

**Remittances, Donations, and Investments  
in Taishan, China, since 1978:  
A Transnational Development Pattern**

by

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## **Abstract**

One of the most prominent points of out-migration from China historically, since 1978 Taishan has again experienced substantial out-migration. My research seeks to describe the effects of monetary inputs from Chinese transnationals – in the form of remittances, donations, and investments – on social and economic transformation in Taishan. To date, the distinct and joint effects of these on ongoing socio-economic developments in China have not been systematically examined. My research demonstrates that transnational remittances, donations, and to a lesser degree investments, have intensive and permanent influences on households, communities and regions.

A large proportion of the residents of Taishan receive remittances via transnational ties. Remittances, a primary income source for many recipients, contribute adversely to the stratification of incomes in the community and have a strong influence on the lifestyles and economic strategies of recipients. Large volumes of transnational donations have effectively modernized schools, hospitals, libraries, village planning, transportation and other sectors in local regions. Local governments therefore depend heavily upon such support for the public sector. Meanwhile, transnational investments in industries, few at first but many in recent years, have gradually changed the economic structure of Taishan, stimulating industrialization and increasing demographic diversity by attracting migrant workers from other places.

The joint effects – the synergy – of transnational remittances, donations, and investments on socio-economic transformation in Taishan form a “transnational development pattern” that is distinct from the industrialization-orientated development course observable in other parts of the Pearl River delta and other coastal regions of China. Underlying the

synergy is a deeply embedded mentality among locals who desire to emigrate themselves and who expect and depend upon external financial support from family members who have already emigrated. This transnational development pattern has created dilemmas specific to Taishan, and deserves global comparison with other regions.

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## **Transliteration**

### **Transliteration of Chinese Terms**

Contemporary China uses *Pinyin* system, the form of romanization of Mandarin or *Putonghua* and the official national standard spoken language based upon the Beijing dialect. Transliterations of most Chinese terms in this thesis are romanized via the *Pinyin* spelling system. Cantonese is a much different pronunciation system from *Putonghua*. My research site is located in a Cantonese dominant region. Though Cantonese spellings have been widely accepted, some terms are given both *Pinyin* and Cantonese spelling forms. For example, the Four Counties has two spellings: Siyi and Szeyap (*Pinyin* and Cantonese respectively). However, with person or place names already widely known in other forms of spelling, the commonly accepted spellings are used in this study, for instance, Sun Yat-sen, and Kuomintang (KMT) in the Wade-Giles system.

## Conversions of Chinese Currency, Measures and Units

### Chinese Currency:

*Yuan*: Unit of Chinese currency, also known as Renminbi (¥RMB).

1 *yuan* (dollar) = 10 *jiao* (dimes) = 100 *fen* (cents)

As of April 30<sup>th</sup>, 2007, the major currency exchange rates for RMB were:

1 *yuan* = 0.14457 Canadian Dollar

= 0.12964 US Dollar

= 1.01391 HK Dollar

For more information of the annual average exchange rates of US dollar and HK dollar for Renminbi yuan, please refer to Appendix 1 of this dissertation.

### Chinese Measures and Units

*Mu*: Chinese imperial system of area. Conversions of this unit to metric are:

1 *mu* = 666.6667 square meter

= 0.06666667 hectare

*Cun & Chi*: Chinese imperial units of length

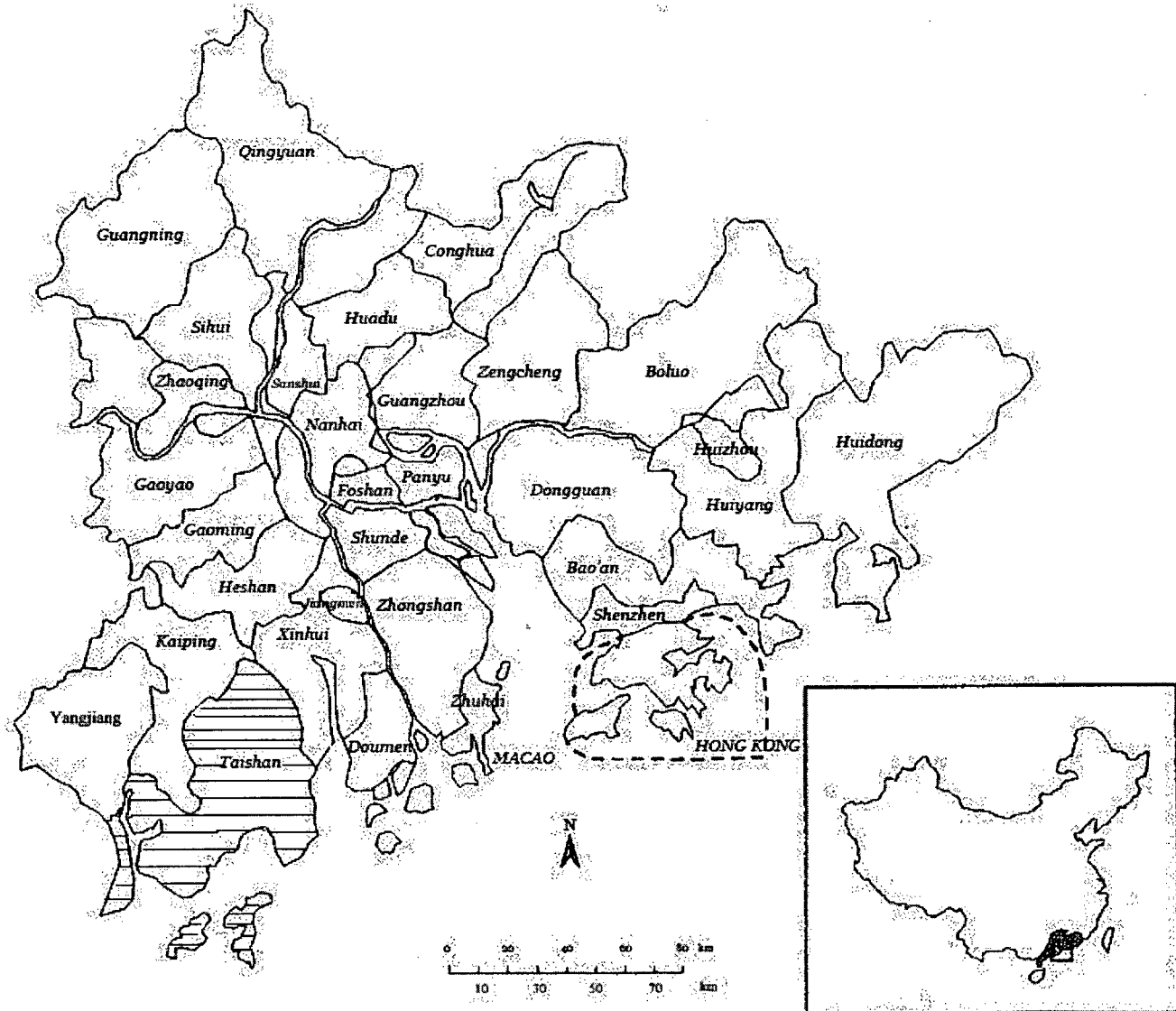
1 *chi* = 10 *cun* = 1 meter

1 *cun* = 3.33 centimeter

## Abbreviation List

Abbreviation	Full Name
ACROF	All-China Returned Overseas Federation
CCP	Chinese Communist Party
COEA	China Overseas Exchange Association
CPPCC	Chinese People's Political Consultative Conference
CPR	Canadian Pacific Railway
FDI	Foreign Direct Investment
IMF	International Monetary Fund
KMT	Kuomintang
NPC	National People's Congress
OCAC	Overseas Chinese Affairs Office
OCC	Overseas Chinese Committee
PRC	People's Republic of China
SEZ	Special Economic Zone

**Map 1 The Pearl River Delta And China**



Source: After Johnson, Graham E. and Woon, Y. F.. 1997. "The Response to Rural Reform in an Overseas Chinese Area: Examples from Two Localities in the Western Pearl River Delta Region, South China", *Modern Asian Studies*, Vol. 31(1):34.



**Map 2 Taishan Townships**



Source: Drawn by Feng Zhang.

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## Chapter 1 Introduction: Taishanese

### Emigrants and Their Influences in the Sending Place

Tuesday, December 28<sup>th</sup>, 2004, was a sunny day in the not-so-cold winter in Taishan, a county-level city located in the southwest corner of Pearl River delta in Guangdong Province, China. A hilarious series of “Celebrating Ceremonies of Awarding, Contract-Signing, Foundation-laying and Opening of Investment Projects in Duanfen,” organized by the Duanfen Township Government of Taishan, was held on an outdoor basketball court on the campus of Duanfen Secondary School<sup>1</sup>. On the huge stage set up with bamboo sticks and fully decorated with red banners, lanterns and balloons, sat twenty-five candidates who were to be recognized in the ceremony. Their formal attire was quite different from that of the local cadres on the stage and the audience. Among the candidates, sixteen were entrepreneurs and nine were donors. To the background of lion dancing, accompanied by drums and gongs, local cadres from Jiangmen Municipality, the senior level of government, Taishan Municipality, and the Township presented an exquisite “Award for Economic Contributions” certificate to each entrepreneur for investments more than RMB ¥10 million *yuan*, and a certificate of “Award for Public Sector Contributions” to each philanthropist for donations totalling at least one million RMB. More than 2,000 people, mostly students from Duanfen Middle School, and local residents participated in the ceremony.

Among the sixteen entrepreneurs, thirteen were emigrants who originated from Duanfen and lived in Hong Kong, Taiwan or North America. Six of the philanthropists were immigrants living in US, New Zealand, or Hong Kong from Duanfen. They represented only

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<sup>1</sup> For details of the celebrating ceremonies, please refer to Special Edition of *Runan zhihua* (Editors of Nei Nam's Flower, 2004).

a small fraction of the thousands of emigrants (*huaqiao* or *tongbao* in Chinese), who originated in or had emigrated from Duanfen to Hong Kong, Macao, Taiwan, North America, Australasia, among other places in the world, and invested in or donated to their place of origin. The ceremony was followed by the signing of investment contracts, laying foundation stones for new construction projects, and ribbon-cutting ceremonies. The celebrations would last for three consecutive days marked with banquets, parties, fireworks displays, sports games, and even a Cantonese opera performance.

Among the bystanders, Mr. Ho strolled into the venue with a toothpick in his mouth after his routine breakfast in a small restaurant at the town marketplace. Mr. Ho<sup>2</sup>, a short and energetic man, was 64 years old, but looked much younger. He lived in Dongbi village in Jianglian, a short walk away from the marketplace. Ho had only finished elementary school, which was considered sufficient in rural China back then, and was recruited as a soldier into the People's Liberation Army, the national military forces. After retiring from the army, he was appointed the village accountant, one of the several key cadre positions in the village, in part because of his military experience and his progressive family background. His elder sister lived in Hong Kong, and several relatives lived in America. In the early 1990s, his two sons, under the sponsorship of a relative, immigrated to Suriname. There, they started a successful gold jewellery workshop. Several years later they returned home, married, and brought their wives to Suriname. Later Ho's daughter was introduced to a young man in New York, who was a second generation migrant from Duanfen, and married him. Every year, Ho received about \$3,000 USD in remittances from his sons and daughter. With this financial help, he built a luxury two-storey house of more than 2,500 square feet at a cost of RMB

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<sup>2</sup> I interviewed Mr. Ho in 2005.

¥80,000 *yuan* in 1995. Ho and his wife had nothing to worry about and lived an enjoyable life. Every morning, Ho went to the marketplace, had *dim sum*, a common Cantonese breakfast, chatted with acquaintances, and would play mah-jong if there happened to be several fellow villagers of his generation available. After having lunch at home, Ho would hang around in the village or return to the marketplace again. As a former village cadre and a rich *qiaojuan* (*qiaojuan* refers to family members or relatives of emigrants), he knew about every big event in town. Mr. Ho would not miss an event like the award ceremony.

Yet not every villager in Duanfen who had family members or relatives abroad was as lucky as Mr. Ho. Several hundred meters away from Mr. Ho's house, Mrs. Ruan<sup>3</sup> was sitting in a low chair in the yard, basking in the warm winter sunshine with her crutch by her side. Behind her was a small and shabby clay building constructed many years before her marriage in 1953. Mrs. Ruan was 72 years old and lived alone. Not long after her marriage, her husband went to the Netherlands and did not return. There was a rumour among the villagers that her husband had remarried in Holland and abandoned her. She would not believe it, but the fact that her husband never returned, and she did not know the truth. She remained as single in the village thereafter. Her only child, a daughter, went to join her father at the age of six. Mrs. Ruan had to do everything by herself, but was now unable to do farming. Every year Mrs. Ruan received two remittances valued at about RMB¥700 *yuan* from her daughter. This was her only source of income. When she looked at her ragged house compared to the new buildings of her neighbours, she sighed knowing that she would never have a chance to renovate it in her lifetime. She could only keep her fingers crossed that her worn shelter

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<sup>3</sup>I interviewed Mrs. Ruan in 2005.

would not collapse before the end of her life, and that her daughter would continuously send her money on time.

At the same time on a construction site in Longtengli, Shandi village of Duanfen, another 72 year-old lady, Mrs. Moy<sup>4</sup>, was busy monitoring several construction workers installing windows and doors in her newly constructed three-story house. She was a temporary returnee from US. In early 1980s, one of her daughters married a Chinese man in Boston and immigrated with him to Boston. In 1984, Mrs. Moy and her husband joined their daughter in Boston, with their four children in Taishan following them one by one. In 1992, her husband passed away in Boston. While her two sons ran a restaurant in Boston, Mrs. Moy returned to her home village on behalf of her children in early 2004, tore down their old house and built a new one costing more than RMB ¥ 200,000. Unlike Mr. Ho, Mrs. Moy had little interest in the on-going ceremonies in town. She was primarily focused on decorating her new house as perfectly as possible and finishing it early enough so that she could return to Boston right after the Chinese New Year. One of her relatives in the village would take care of the new but empty house upon her return to Boston. The house is currently used for short-term accommodation when she or anyone from her family visits. Right in front of her house stood the birthplace of Quong Tart (or Mei Guangda), leader of Chinese immigrants in Australia during later Qing period<sup>5</sup>. Mrs. Moy's family shared the same sub-lineage of Moys with Guong Tart. Her new building, right behind Quong Tart's dilapidated and abandoned one-story house, was so grand and distinctive in contrast.

These vignettes are only short moments of a history which started in the second half of nineteenth century when hundreds of thousands of Taishanese went abroad (Hsu, 2000a).

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<sup>4</sup> I interviewed Mrs. Moy in 2005.

<sup>5</sup> For more information on Guong Tart, please refer to Chapter 3.



When they settled down in their destinations, they sent their savings to their families who were left behind, or returned as a parvenu. They would marry, build new homes, and bring or sponsor their dependents to join them abroad if possible. Some rich migrants donated to the lineage organizations, education, health, or other welfare and infrastructure sectors. The coming and going of the migrants and the monetary inputs fundamentally transformed the social and economic dynamics of Taishan during the century before the 1950s and has continued to do so since 1978 when China reopened its doors to the outside world.

This study will draw upon evidence of the impacts of the donors, investors and remitters on the recipients, like Mr. Ho, Mrs. Ruan and Mrs. Moy, and the local communities in Taishan, one of the major sending places of Chinese immigrants to North America. I will explore how, since 1979, the physical movement of the Taishanese migrants and their financial transfers of remittances, donations, and investments have influenced family life and community development at the sending point. By examining the interacting consequences of remittances, donations and investments of the emigrants, I seek to understand how some regions in China, like Taishan, have been shaped by these external forces. In addition, I attempt to establish new dimensions in China's dramatic on-going social economic transformation which, in a broad sense, is expected to theoretically enrich the area of development in China.

The contents of this dissertation are arranged in the following order:

Chapter 2 sets up the framework of this dissertation. I will briefly review the major academic studies on remittances, donations, and investments of Chinese transnationals, and discuss my research purpose. I will argue that the three types of monetary inflows from outside of China have not been systematically understood in terms of how they have

transformed the local family life at the micro-level and socio-economic development at the macro-level in contemporary China. By putting the economic influences of Chinese migrants in a global context, I will locate this study in a traditional sociological branch – the area of social change and development, arguing that the significance of this research could bring light to China's on-going transformation and sociological development discourse more generally. This chapter also sets up the framework in which analyses of this thesis will fully unfold at three levels: local household, community, and the larger region in Taishan. In the end, I will discuss how to define some of the key terms – conceptualization of migrants who originated from China but participated in China's domestic affairs, their monetary transfers to China, and other related terms.

The research geographically focuses on Taishan Municipality in general and an administrative village of Taishan in particular. Chapter 3 provides background information, such as the historic, geographic, demographic, economic, and cultural context of Taishan and the local community, and the methods this research employs. Three questionnaire surveys were conducted in the village as part of a longitudinal study, which provided the data that I use to analyze the influences of migrant remittances at the household level. This chapter will also elaborate the statistical variables and analytical strategies used in this research. Using a combination of both quantitative and qualitative research, my dissertation also relies on data obtained by documentation, in-depth interview, and observation methods.

Chapter 4 provides a historic background of Taishanese migration and reviews China's policies towards transnational remittances, donations, and investments. Taishan is one of the major sending places of Chinese emigrants; constant out-migration waves from Taishan have taken place since the mid-nineteenth century. The early sojourning trips of

Taishanese abroad were triggered by internal and external conditions while the subsequent waves were characterized by chain migration. Since 1949, when the Chinese Communist regime was established in the mainland, Taishanese emigration and overseas connections and their economic contributions in terms of remittances, donations, and investments to their ancestral land have been significantly directed by China's cyclic "close-open" policies towards Chinese transmigrants abroad and their relatives at home. To attract more remittances, donations and investments, the Chinese governments at different administrative levels have institutionalized various privileges to Chinese transnationals since 1978 when China reopened its doors to the world.

By analyzing the longitudinal questionnaire data collected in Taishan, Chapter 5 quantifies the influences of Taishanese transnationals' remittances on the local household economy. Findings reveal that the local residents have kept intense connections with their transnational relatives, and remittances sent by the latter have played a multi-dimensional role at the household level. For many local people, remittance from abroad is an important and substantial source of income, and many households receive remittances from such connections. Households receiving remittances are generally richer than those without remittances; they live in luxury and tend to engage in non-farming economic activities. However, with the overall remittance volumes steadily increasing, remittances have polarized the households in terms of income level.

The significance of transnational donations and investments can be easily observed at the local community and the larger region beyond. Chapter 6 deals with how large amounts of transnational donations and increasing volumes of investment in industry have profoundly transformed the economic landscape in Taishan. After 1978, Taishanese transnationals

resumed the tradition of donating to education, health, village planning, transportation and other public sectors in astonishing volumes, which in turn, have fundamentally changed the profile of the local public sectors to the benefit of the locals. Meanwhile, Taishanese entrepreneurs began to set up manufacturing factories in their ancestral places. Compared to its once slow pace, industrialization under Taishanese investments has been accelerating in recent years, which has gradually changed Taishan's macro-economic structure previously dominated by agriculture.

In the final part, Chapter 7, I will provide conclusions based on the synergy of transnationals' remittances, donations, and investments in Taishan. Using a historical perspective, I identify Taishan's developmental course, as represented by the western Pearl River delta, as exhibiting a "transnational development pattern." This pattern, featured by the deep participation of Taishanese in the local affairs through the means of remittances, donations and investments, emerged one century ago, matured in the 1920s and 1930s, was disrupted for about two decades after the 1950s, and was revitalized to a new height after 1978. Behind this transnational pattern is a "transnational mentality," the long-established expectation of the locals to emigrate and the taken-for-granted norm of receiving and depending on external help from the émigré. The transnational development pattern in the western wing of the Pearl River delta, along with dramatic industrialization in other parts of the delta, diversifies on-going transformation in the region. However, this development strategy bears inevitable dilemmas and has brought increasing challenges to the local community. Also, Taishan's transnational experience has international matches and deserves global comparison.

## **Chapter 2 Literature Review, Research Purpose and Conceptualization**

This chapter begins with a literature review in which this study will theoretically fit in, and then discusses the research problems that this dissertation aims to resolve. At the end, I clarify some key terms that this research frequently uses.

### **Literature Review**

Scholars have documented the influences of the economic activities of those who originated from China in various ways<sup>6</sup>. Foreign capital, in terms of remittances, from Chinese transnationals and, to a lesser degree, the values and culture brought in by them, have contributed to the economical and social well-being of local households, communities and the homeland. The impact of overseas Chinese remittances on local people's standard of living can be clearly observed - families with overseas relatives receiving financial aid from abroad often: accumulate wealth, live in elaborate and modern houses influenced by foreign architectural styles, are headed by women when husbands and adult sons are abroad, and are ready to join overseas family members by emigration (Mei, 2004; Vogel, 1969:21; Williams, 2002:75; Zhang, 2002).

Particularly in the area of remittance studies concerning Chinese transnationals, there have been efforts to document the volumes of remittances sent to China. This was first attempted by an expatriate Customs official in the late Qing (Morse, 1904), and carried out further by several scholars (Remer, 1933; Yao, 1943; Zheng, 1940). Together with some

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<sup>6</sup> In this thesis I will term those who originate from China and keep connections with China as "Chinese transnationals." See details in the conceptualization in the final part of this chapter.

recent studies (Du, 1999; Hicks, 1993; Lin, 1999; Xia, 1992; Yuan and Chen, 2001)<sup>7</sup>, they laid the cornerstone for studies in this area by focusing on quantifying the overall remittance volumes and/or generalizing about the mechanisms of monetary transfers between transnational destinations and the Chinese homeland during different times throughout the Republican period. Based on the banking records of remittances transferred from Hong Kong, China's *de facto* window to the world during the Cold War period, Wu (Wu, 1967) attempted to describe the scope and channels of remittances to Communist China in the 1950s and early 1960s. All his data were obtained from financial institutions which, in turn, impaired the comprehensiveness of his accounts on the remittances, as money transferred to China through non-institutional channels were not included in his study. Compared to the overwhelming studies on remittances made in the pre-1949 period, systematic studies on the same subject post-1949 appear insufficient in both quantity and depth.

One common flaw in these studies is that they neglect the specific consequences of the remittances on individual lives, the direct target that remittances are expected to reach. In other words, the effects of remittances on the recipients' daily lives are generally not well-scrutinized. Fortunately, Chen Ta (Chen, 1940) carried out a survey in southern Fujian and eastern Guangdong where most overseas Chinese in Southeast Asia originated, marking the first-ever comprehensive sociological research in this area. He found that families receiving regular overseas remittances were generally better off and had different lifestyles than non-emigrant families (Chen, 1940:87-88). Based on her field trip to Guangdong and Fujian at the end of the Cultural Revolution (1966-1978) four decades later, Yu (Yu, 1979a, 1979b), observed that overseas remittances had manifest effects on community economic structure,

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<sup>7</sup> In fact, the work edited by Hicks (Hicks, 1993) is not recent at all. It contains three investigation reports drafted by Japanese colonial banking institutions in Taiwan in the 1920s and 1930s, two of which were also translated from Japanese into Chinese (Ali, 1979; Yang, 1983, 1984).

individual religious and wedding ceremonies, and economic involvement in the collective production. Nearly five decades after Chen Ta's research, Su (Su, 1988) and Woon (Woon, 1990) made similar but small-scale investigations in the western wing of the Pearl River delta in Guangdong, the ancestral point of most North American Chinese. Both of them agreed with Chen Ta that households with overseas connections and remittances were richer than those without. Woon further pointed out that the remittance dependents had little incentive to become involved in long-term lucrative agricultural and industrial activities (Woon, 1990:151-155). Yet, Chen's data were drawn from the early 1930s, during the heyday of remittances and donations from overseas of the Republican period and failed to use random sampling in his data collection. Yu's general observations were based on collective production which was institutionally replaced by the household responsibility system in China in the early 1980s<sup>8</sup>. In addition, Woon's study focused on the typology of overseas connections rather than overseas remittances, and although Su provided some solid figures, there were no detailed explanations or theoretical generalizations. As dramatic economic changes occurred in much of China after the 1980s, especially urbanization and industrialization, the dynamics of the influences of overseas remittances on local households and individuals remain unclear. Furthermore, the dimensions of the remittance flows and their impact need to be scrutinized so that they can be compared with earlier findings.

Chinese transnationals' donations to China have been documented in extensive scholarly works. One common finding of these studies, is that donations from Chinese transnationals have direct or indirect contributions towards providing basic conditions and

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<sup>8</sup>The household responsibility system has been a crucial national policy of China since 1978. Under this system, an individual household, or a set of households, assumes the task of agricultural production from the land assigned by the collective and makes the payment to the government. For the dynamics of the household responsibility system, please refer to the these studies (Feng, 2004; Lin, 1987, 1988b).

facilities to local education and health facilities, establishing welfare systems, and upgrading infrastructure in transportation, marketing facilities, irrigation and drainage channels, and water supply networks at the sending points of migration (Lau, 1986; Li *et al.*, 1993; Lin, 1988a; Lin and Zhuang, 1989; Mei, 1996; Ren and Zhao, 1999b; Woon, 1990; Zhang, 2003; Zhuang, 1999). Thus, such contributions have significantly brought about economic change that has accelerated modernization in the local communities.

Some sociologists and anthropologists have examined the relationship between emigration and the operation of local organizations in the place of origin. Through field investigations in South China, some (Kulp, 1925; Watson, 1975:50-53; Woon, 1984) have found that pre-1949 period donations from Chinese emigrants have generally contributed to conserving and strengthening the local lineage. This is the most crucial collective social organization bonding individuals together in the rural area and the emigrants with their ancestral community (Freedman, 1965). With the resumption of the lineage ties between Chinese transnationals and China after the Cultural Revolution, donations from Chinese emigrants have played a vital role in the revival of local lineage organizations and its activities (Johnson, 1993:131-133; Woon, 1989).

By emphasizing the transnationals' altruism and loyalties to their ancestral places, these studies may reinforce certain stereotypes –that all overseas Chinese, or *Huaqiao*, are rich in their place of settlement and loyal to China, as can be seen through their generous donations. In fact, only a small group of them have such commitments and economic capability. Little research has been done on how such transnational donations could be utilized in a more efficient way. Moreover, most scholars have focused on the positive aspects of transnationals' donations, often overlooking at how such donations could have



constrained, distorted, or impaired the strategy and structure of the local economy in *qiaoxiang*, homeland of Chinese transnationals.

After 1979, China's national strategy placed priority on economic revival and reconstruction by abandoning the Maoist leftist political ideology and opening its door to the outside world. A series of initiatives were created by the Chinese authorities to invite global economic forces to participate in its economic development, or the so-called, "four modernizations"<sup>9</sup>. Foreign Direct Investment (FDI), one of the main streams of international capital flows, has played a significant role in China's rapid economic growth since the early 1980s. Over the past decade, China has accounted for nearly one-third of gross FDI flows to all emerging international markets, with about 60 percent of these flows made to Asia (Prasad and Wei, 2005:6). China has ranked among the top FDI recipients in the world in recent years, receiving \$165 billion USD in direct investment flows between 1998 and 2001. Investments of Chinese entrepreneurs from Hong Kong, Taiwan, Southeastern Asia and other regions to China through small and medium-size firms have played crucial role of FDIs in China since the early 1980s (Ampalavanar-Brown, 1998:612-613; Lever-Tracy, 1996:4). Studies have shown that by establishing various small and medium-size manufacturing factories, firms and multinational corporations in many sectors using both external and internal networks, Chinese transnational investments have effectively brought in managerial skills and technology, provided employment opportunities to both local residents and labour migrants from the hinterland, introduced capitalist entrepreneurial spirit, boosted export-oriented trade, and driven up industrialization and urbanization in general in the local regions (Ampalavanar-Brown, 1998; Ash and Kueh, 1993; Godley, 1981; Huang, 1999; Lever-Tracy,

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<sup>9</sup> The four modernizations include industrial modernization, agricultural modernization, science and technological modernization, and military defense modernization.

1996; Lin, 1990; Luo and Howe, 1993; Tan, 1994). Compared to *huaqiao* investments in the pre-1949 period which flowed into China not primarily for profit, but largely out of duty and loyalty to support the Chinese economy tortured by social chaos and foreign invasion (Wang, 1993:936), investments from Chinese transnationals since 1978 are motivated by profit and market forces.

Most studies of Chinese transnational investments in China have focused on quantifying the volumes of such capital flows, generalizing the patterns of investment behaviour and networks, and highlighting the overall economic integration within South China, Hong Kong, Macao, Taiwan, and Southeast Asia, or the so-called "Greater China" region. As a matter of fact, many Chinese transnational investors are also donors at the same time and, to a less degree, remitters, thus their investing behaviors in *qiaoxiang* are often inter-linked with their donations and remittances. Thus, I argue that their investments cannot be fully understood if they are examined in isolation from their donations and remittances. Also few have paid sufficient attention to the economic effects of such investments on intra-regional development strategies in China's *qiaoxiang* (Smart and Hsu, 2004). In the case of Guangdong province, which is largely occupied by three historically and culturally ethnic groups living in geographically distinct locations<sup>10</sup>, the strategies and processes of economic development have unfolded with different patterns and dynamics. Furthermore, similar to the generally positive views on Chinese transnational donations, critical analyses, such as the negative implications of FDIs to China's participation in the global economy, have been sparse. In other words, are there any side effects of the extensive global capital flows in

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<sup>10</sup> The three ethnic groups are: Cantonese mainly living the Pearl River delta, Hakka living mainly in the eastern mountainous part, and Chaozhou people living in the southeastern costal region. Even the Pearl River delta is economically, socially and culturally heterogeneous in terms of natural endowment, dialect, and development level.

China's long-term development? If so, what are they? What do such industrial investments mean to the demographic homogeneity of the long-established communities?

As previously discussed, the large volumes of remittances, donations and investments by Chinese outside of the Mainland have significantly influenced China's economic transformation since the second half of the nineteenth century. This raises far-reaching questions concerning the past and present development process in the sending places of Chinese transnationals within the global system in which China has already deeply involved and been substantially shaped. Development has been the main source of China's ongoing socio-economic transformation since the end of the political chaos of the Cultural Revolution. However, due to different political, cultural, social, and geographical particularities, different regions may have experienced different development dynamics and patterns, which are yet to be compared with each other and generalized in both local and global contexts. Furthermore, even within the Pearl River delta which carries heterogeneous socio-economic features, it is worth exploring whether different intra-regional development patterns have formed as a result of different internal and external forces.

The illustration and examination of Chinese transmigrants' remittances, donations and investments in this research is ultimately expected to add new elements to understanding China's development course. Thus, it is necessary to review the sociological theories of social change and development. In over 150 years, sociology has witnessed varied theoretical frameworks and methods for the analysis of developmental processes, each of which tries to engage extensively in questions linked to the causes and consequences of societal development. During the formative period of sociology, pioneering sociologists noticed the domestic transformation of the shift from agriculture to industry in Western Europe between

the seventeenth and the nineteenth centuries and attempted to identify the forces which contributed to such a shift (Durkheim, 1964; Tonnies, 1957; Weber, 1947; Weber, 1958). For them, the traditional, rural, and collectively bound societies were disappearing under rapid capitalist industrialization and could only remain as nostalgic memories. Industrial, capitalist, rational, and urban-dominated societies seemed to be inevitable and had already caused substantial social problems.

The capitalist industrialization and urbanization had encountered enormous problems during the first half of the twentieth century when epidemic economic depressions occurred periodically and globally. Economists (and other social scientists as well) began to analyze the shortcomings of the capitalist economy and attempted to derive strategies that could pull the national economy from periodic stagnation and depression. Some of them (Keynes, 1936; Lewis, 1954, 1955; Schumpeter, 1961) agreed that macro-economic means such as government intervention is necessary and pivotal to regulate the fluctuations of the economy. By recognizing the cyclical feature of capitalist economy, they advocated that governments should regulate the supply and demand of money and labourers in the market, stimulate or discourage economic activities and production when necessary, foster knowledge, and encourage technological and organizational innovations. Their theories have brought in tremendous influence on governmental control/intervention over the national economy at the macro-level.

After World War II, some scholars attempted to find a universal model based on the development 'success' of the First World and thus to rebuild the world order. Generalizing the historic economic patterns of Western Europe and North America, Rostow (Rostow, 1960) generated a developmental model consisting of five linear stages -- the traditional

society, the preconditions for take-off, the take-off, the drive to maturity, and the age of high mass-consumption. Parsons and his followers (Parsons, 1966, 1971; Parsons and Shils, 1951) moved further to explain social evolution in terms of a society's structural functions, adaptations, and differentiations. All these theories, known as the modernization school, asserted that the development model of the industrialized countries was the pathway other nations needed to follow in order to achieve modernization.

In the background of accelerated uprising and independency of the former colonies of the West after the World War II, some scholars built dependency theory (Amin, 1976; Cardoso and Faletto, 1979; Dos Santos, 1970; Frank, 1967, 1969). They argued that the Third World, most of which were previously colonies of the West, was not, as modernization theory suggested, an area ripe for development along the pathway taken previously by the West, but instead a subsidiary part of the Western capitalist system. Dependency theory emphasizes the unequal political-economic relationship between developed and developing nations, arguing that due to capitalist expansion and First World exploitation of the Third World, the Third World has become externally dependent upon core capitalist countries and internally underdeveloped. The world system theory, which appeared in the 1970s, seems to make compromises between dependency and modernization theories by acknowledging the existence of an unequal global relationship (dependency theory) while recognizing the possible upward mobility of underdeveloped nations in the capitalist system (modernization theory) (Galtung, 1972; Wallerstein, 1974, 1976). Furthermore, it divides the world into three – the core, the semi-periphery, and the periphery. A country, depending on the degree of its capitalist development, might move from one group to another.

In the late 1980s and 1990s, the so-called "social capital" approach started to enjoy increasing academic affluence (Bourdieu and Wacquant, 1992; Burt, 1992; Coleman, 1990; Putnam, 1992, 2000). According to this theory, social capital, the distinct network configurations of individual or institutional actors, plays a crucial role in explaining development outcomes. Scholars on migration studies have embraced this approach and adapted it to studies explaining how the ethnic entrepreneurship of immigrants helped the intra-community economy flourish in the place of destination (Light and Karageorgis, 1994; Portes, 1995; Waldinger *et al.*, 1990; Wong, 1988; Woolcock, 1998) and how transnational ties facilitate emigrant capital flows into the place of origin, which has significantly fostered and stimulated market economy and industrialization in the local communities (Chen and Wu, 2006; Douw *et al.*, 1999; Lever-Tracy, 1996; Lin, 1997; Nayyar, 1994).

Since the beginning of the 1990s, 'Globalization' has become an increasingly influential parameter in describing interacting global forces. The term "globalization," albeit used without clarification in many cases, refers to the process and status quo of an interdependent and integrated world in which flows of goods, persons, symbols, ideas, ideologies, technologies, capital and social relations interchange and standardize with accelerating means of communication. Globalization strengthens world economic chains (Feenstra, 1998; Gereffi and Korzeniewicz, 1994), spans across a variety of social and institutional settings beyond the nation-state boundaries (Brenner, 1999; Castells, 1997), and reshapes the structure of local and global inequality (Sassen, 1988, 1990). It also results in a new way of life, action and culture (Boli and Thomas, 1999; Giddens, 1990; Meyer *et al.*, 1997). The economic, political, social and cultural globalization occur at both local and global levels, in a process known as "glocalization"/"hybridization" (Pieterse, 1995;

Robertson, 1995). Studies of international migration from the perspective of globalization illustrate that the coming and going of transnational migrants, by linking local and global communities, channel the flow of social, economic, and cultural resources across national boundaries, thereby impacting development trajectories (Basch *et al.*, 1994; Glick Schiller *et al.*, 1992; Guarnizo, 2001; Pries, 2001).

In recent years, some scholars (Caufiled, 1996; Dichter, 2003; Sogge, 2002; Tarp, 2000) abandoning the ideology-debated and rosy jargons of the development theories, have turned their eyes to how global poverty can be alleviated through financial aid from international institutions. This is the so-called "aid theory," which insists that foreign aid, in terms of international loans from the World Bank and the International Monetary Fund, the two most influential monetary bodies in the world in the post-WWII era, has played a crucial role in easing and eliminating poverty in some areas of Asia, Africa and Latin America, where there is no domestic capital available for essential development. This theory also points out that the international organizations and their agents, as well as the local authorities have failed to recognize environmental, cultural, and political capacity in the aid-receiving areas, and thus failed to establish proper technical formulae, strategies, and remedies to maximize the efficiency of foreign aid.

The above development theories, often representing different ideologies from standpoints of different nations or agents (the developed vs. the developing countries, localism vs. globalism, or the third world vs. global organizations), have reached contradictory conclusions. They focus upon nation-states, global markets and capitalism, but often ignore social relationships, particularities of individual actors, and the variety of their responses to external forces. Therefore, the interrelationships between global changes and

individual participants are often overlooked. China, which was originally difficult to position in either the Second World or the Third World during the Cold War due to its complicated historic, economic, and topographic features (Horowitz, 1972:34-35)<sup>11</sup>, has emerged as a major powerhouse of the world economy in the last two decades. However, it has not received enough attention in the above studies in a global perspective, especially given its importance to the world economy<sup>12</sup>. China had been suffering foreign invasions, colonization, underdevelopment, and dramatic political changes for the last two centuries yet has become the world leading figure in economic growth since the 1980s. Its development has multi-dimensional implications in the international community, including both the former Soviet bloc and the former colonies in Latin America, Africa and Asia.

Fortunately, a few China scholars have discussed China's developmental discourse from both historical and contemporary perspectives. Skinner (Skinner, 1971) points out that due to its periodical up-down political instability, Chinese traditional rural society has historically experienced a cyclical trend of closure and openness in which rural communities, based on the standard marketing system (Skinner, 1964, 1965a, 1965b), swing from openness during the heyday of a dynasty to closure during inter-dynastic chaos. Similarly, Huang (Huang, 1990), by reconstructing China's Ming-Qing agricultural history and drawing on twentieth-century ethnographic data and his own field investigations in the lower Yangzi Delta, finds that the Chinese rural economy, due to insufficient capital and technological input, had experienced involutionary growth (or long-term stagnation) rather than

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<sup>11</sup> Horowitz's study is consistent with the Dependency theory in terms of locating the First World and the Third World. He categorizes the international world into three: First World (dominated by the United States, including allies in Western Europe and satellites in Latin America and elsewhere), Second World (dominated by the Soviet Union, including allies and/or satellites in Eastern Europe and parts of Asia), and Third World (non-aligned and non-satellitic nations with clustering in Africa, Asia, Latin America) (Horowitz, 1972:63-71).

<sup>12</sup> In fact, a few scholars, such as Lever-Tracy and Tracy (Lever-Tracy, 1996) and Woon (Woon, 1990), have applied Frank's dependency theory in their studies.



development. Fei Hsiao-Tung (Fei Xiao-tong) (Fei, 1983), China's late prominent sociologist and anthropologist, after conducting a series of investigations in a village in Yangzi Delta for half a century, concludes that apart from grain production, diversified agricultural production (agricultural sidelines) and rural industrialization are the pathways which lead peasants to prosperity. To understand China's rapid socio-economic change after 1978, Nee (Nee, 1989) proposes a market transition theory which refers to China's policy shift from bureaucratic control of resources to market-determined allocation in the 1980s. This shift, by redistributing power and privilege to favour direct producers, has improved incentives for direct producers, stimulated the growth of private market, and provided entrepreneurs with an alternative path for socio-economic mobility. Naughton (Naughton, 1999) agrees with Nee and further points out, however, that after 1992, China has been in a phase of structural transformation from a predominately agrarian economy to an increasingly industrializing, urbanizing economy with increasing population mobility. Realizing China's astonishing economic transformation during the recent decades, Frank (Frank, 1998, 2005), the founder of dependency theory, optimistically predicts that China will probably regain its central position in the world arena in the twenty-first century if it keeps its rapid economic growth just as it did in the world economy before the mid-1800s.

The above scholarly works, based on empirical data of China's mainstream rural society from the past to present, have contributed to varying degrees to understanding the process and patterns of socio-economic dynamics in China. However, one type of community, though geographically and demographically minor in comparison to the mainstream society of China, is neglected in the above literature. Communities in some coastal regions have extensive connections with the outside world by the frequent movements of human and

goods. These so-called emigrant communities have relied more on external forces from their émigrés than from agricultural or sideline production of their own, and thus have been incorporated into the external world more than any other part of China historically. Because of these distinct characteristics, some questions arise -- How are these emigrant communities influenced by external forces? Have they experienced a similar or different developmental course compared to those mentioned previously? If it is different, what is it? What theoretical implications can the experiences of this type of community contribute to China's on-going transformation? These questions constitute only part of what my research aims to address. In the following section, I will scrutinize how this research is going to fill in all the literature gaps.

### **Research Purpose**

As previously discussed, there are literature gaps regarding the consequences of Chinese transnationals' remittances, donations, and investments in China in the reform era. First, the significance of overseas remittances to current China is still largely overlooked and lacks systematic examination with solid quantitative evidence. Few researchers, except two scholars (Su, 1988; Woon, 1990), have attempted to comprehensively quantify the specific influences of overseas Chinese connections and remittances on the contemporary household economy. Moreover, there has been little longitudinal comparison of these external influences over different time intervals. This is probably due to not only the unavailability of remittance statistics released by the Chinese authorities but also by the shift of the Chinese government interest from attracting remittances to emphasizing foreign investment (Qiu, 2004:18-19). Second, the volume and patterns of Chinese transnationals' donations and investments in China have been well documented, but critical analyses on the limitations and

even side effects of such external monetary inputs on the long-term development of *qiaoxiang* lack depth and scope. Their social impact to the local communities is often absent in such literature. Third, available studies often scrutinize transnational remittances, donations, and investments separately in different disciplines and neglect their combining effects. In fact, the three forms of transnational monetary flows, in many cases, often come together in the receiving place. Historically, remittances and donations have often gone hand in hand to *qiaoxiang*. Furthermore, some of the donors are also remitters and investors. Thus, the story cannot be completely told if remittances, donations, or investments are analyzed in isolation. Finally, the joint effects, or synergy, of transnational remittances, donations, and investments in some minor communities of China are seldom theorized and incorporated into the area of sociology of development, and provide no comparison with other developmental initiatives in China, such as sideline production and industrialization.

This research, by combining both quantitative and qualitative data of Chinese transnationals' remittances, donations and investments at household, local community and regional levels, aims to fill in these academic gaps and to see their synergy in the local development course. Dynamics and influences of transnational participation in Taishan will be examined as their remittances, donations, and investments are identified and analyzed separately in these different levels. The ultimate goal of this research is, by exploring the synergy of the three forms of transnational monetary inputs, to uncover a development pattern which is distinctive from other development courses in China.

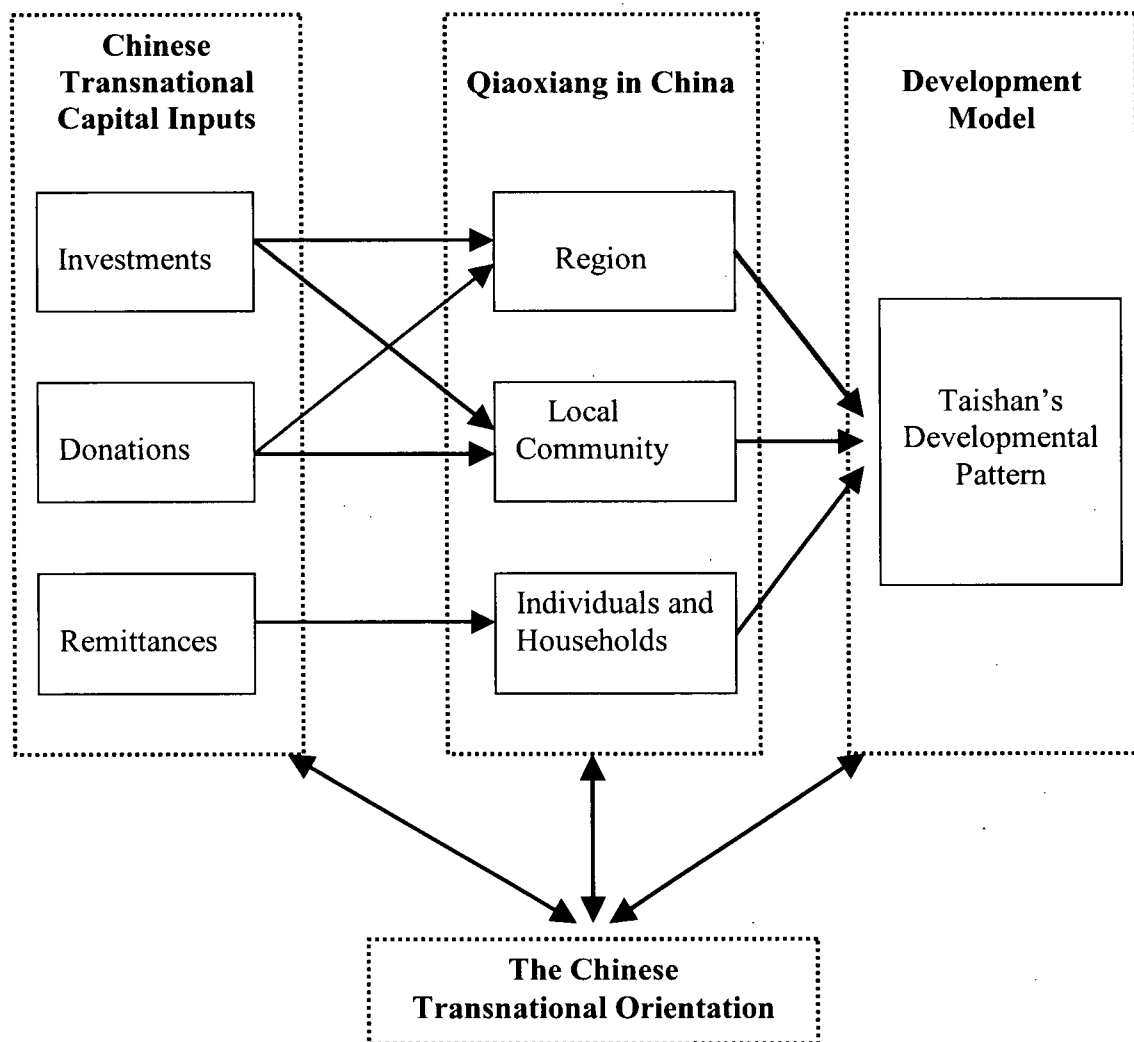
This is an empirical study in which a local community in the west wing of the Pearl River delta in South China is selected to illustrate the economic influences of Chinese transnationals in the context of a larger area – the Pearl River delta (See Map 1). Analyses

will firstly focus on the effects of remittances on the local household economy at the micro-level and then extend to broader levels— the influence of donations and investments on education, health and other social welfare systems, transportation, and industrialization of the local community and the wider region. Only by combining both micro and macro data, is it possible to obtain a comprehensive understanding of how the dynamics of the Chinese transmigrant capital inputs to the delta, especially in the west wing of the Pearl River delta region, have affected the process and result of local socio-economic transformation in multiple dimensions since 1978. In addition, this could shed light on the intra-regional development initiatives within China and contribute to the development paradigms in general.

Figure 2.1 shows the operational framework of this research, in which my analysis will unfold. It identifies the major forms of transnational contribution to the local area – Taishan, and illustrates multiple dimensions of the synergy of these factors at various levels. The Chinese transnational monetary inputs are transferred into China in three forms: remittance, donation and investment. In the homeland of Chinese transmigrants there are three levels of recipients of such inputs: household, the local community, and the larger region in the western Pearl River delta. Remittances from Chinese transnationals go directly into the hands of the individuals who have transnational ties abroad. Donations from Chinese transnationals mainly contribute to the public sectors in the local communities, such as education, health, welfare systems, lineages, transportation, and other branches of the infrastructure. Investments mainly concentrate in the manufacturing industry within the local community and the wider region. These have gradually changed the macro-structure of the local economy. All three types of capital flows in many cases are transferred into China

together and have interactively transformed the local economy and social spheres. The main body of this thesis will illustrate in what form and to what degree this transformation has taken place under the transnational monetary inputs in Taishan during the reform era, and ultimately try to theoretically generalize the characteristics of this transformation.

**Figure 2.1 Operational Research Framework**



This study will illustrate that the Chinese transnational capital inputs, as a result of long-term intensive mass emigration, have caused significant socio-economic transformation at the household, community, and regional levels in the sending place in China. The characteristics of the socio-economic transformation under tremendous external capital flows are much different from those in regions without economic influences from Chinese transnationals. This developmental course in Taishan can be generalized as a development model which is typical in the western Pearl River delta and other coastal regions in Guangdong and Fujian provinces. Behind the transnational remittances, donations, investments, and the transnational development pattern is the historical, cultural and psychological orientation deeply rooted in the local area – the Chinese transnational mentality, the faith in emigration and relying mainly on remittances and donations and, to a lesser degree, investments from the emigrants. This mentality has a long history in Taishan – it was formed in the second half of the nineteenth century and has penetrated the western Pearl River delta for more than a century. It is deeply embedded in the comings and goings of Taishanese transnationals, goods, and ideas accompanied with such movements, and their participation in Taishan. This development model, a different strategy from industrialization which has dominated and been proven effective in most parts of China in the last two decades, is the manifestation of the Chinese transnational mentality, and in turn, justifies and strengthens such a mentality.

The dynamics of Taishanese remittances, donations, and investments will be examined separately, and their synergy and theoretical implications will be generalized in the final part. This thesis will focus on those who are of Chinese origin and currently reside outside of the Chinese mainland and their influences on China's economic development

through financial transfers. It is often debatable both academically and politically on how to define and distinguish those of Chinese origin, especially when they keep close economic connections with the Chinese mainland. Similarly, it is worth clarifying how the monetary flows to China in the form of remittances, donations, and investments are measured and examined in this research. To avoid misunderstanding and misuse of the key terms that this study will frequently mention and discuss, it is necessary to clarify and define these terms here.

### **Conceptualization of Overseas Chinese, Compatriots and Transnationals**

Studies referring to those with Chinese ancestral origins residing outside of China always encounter a problematic issue – how to define these people in terms of their ethnicity, citizenship and residential status, and connections with China. According to both the governments of the People's Republic of China (PRC) and the Republic of China in Taiwan, those of Chinese origin, who do not live in China, no matter whether or not they are citizens of the countries they reside in, are called “*huaqiao*” in mandarin, which is usually translated into English as “overseas Chinese.” “*Hua*” means Chinese, and “*qiao*” means guests or visitors in other places. Together, *Huaqiao* implies that the individuals are Chinese by descent residing temporarily as “sojourners” in “foreign” countries, who will, or are expected to return to China in the future, and who are seen to have potential commitments to China. *Huaren* or *huayi*, a term which parallels *huaqiao*, are regarded as those of Chinese origin but holding citizenship in their country of settlement. This term can be translated as “Chinese overseas.” The government of the PRC considers Chinese living in Hong Kong, Macao and Taiwan as “*tongbao*,” or compatriots. Since 1949, these three entities have been seen as

integral parts of China by the PRC government. They were contested places, and remain so in the case of Taiwan; Chinese in these places share or are expected to share in Chinese sovereignty<sup>13</sup>.

Thus overseas Chinese, or *huaqiao*, are categorized by both the PRC government and the Republican government in Taiwan with exclusive political meanings and are accordingly offered some political privileges. The meaning of *huaqiao* from the perspective of the PRC government began to change in the 1990s as the government realized the political ambiguity of the concept based upon the notion of *jus sanguinis*. In Clause Two of *The PRC Law on Protecting the Rights and Interests of Guqiao (Returned Overseas Chinese) and Qiaojuan (Overseas Chinese Dependents)*, passed by China's National People's Congress in 1990, *huaqiao* is clearly defined as "those who are Chinese citizens but residing in foreign countries." By this definition, *huaqiao* often refers to Chinese businessmen, students and visitors who carry Chinese passports in other countries. In *de jure* terms, *huaqiao* does not include those who are of Chinese origin and citizens of their countries of residence. But the *de facto* implications of *huaqiao* remain the same as before<sup>14</sup>. If a person who originated from China, but has obtained citizenship in another country visits China, he/she is still considered by Chinese as *huaqiao* when he/she is in China. If he/she has to deal with the local government, he/she must go to the local *Qiaoban (Qiaowu bangongshi)*, the Overseas Chinese Affairs Office. If he/she donates or invests in China, he/she will be offered *huaqiao*

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<sup>13</sup> China resumed sovereignty over Hong Kong on July 1<sup>st</sup>, 1997, and over Macao on December 31<sup>st</sup>, 1999. Taiwan, the PRC insists, will be united sooner or later. Interestingly, Hong Kong citizens after 1997 and Macao citizens after 1999 have still been addressed as *tongbao* in PRC's official statements.

<sup>14</sup> A typical example is the recent riots against Chinese in the Solomon Islands in April 2006. Sparked by the result of the national election, protests and rallies broke out among local residents in Honiara, which turned out as riots against prosperous Chinese businessmen. Mob violence, arson, and looting took places in commerce districts dominated by Chinese, and Chinese became the target of the attack. The government of the PRC boldly made a rare decision to evacuate Chinese from Honiara to China. A total of 323 Chinese, either Chinese citizens or Solomon Islands citizens, flew to Guangzhou by two flights sent by the Chinese government (Overseas Chinese Office of the Guangdong Provincial Government, 2006).



privileges (*huaqiao daiyu*) by the local authorities. Similarly, the *huaqiao* usage extends to many popular names and institutions in China, such as *huaqiao* schools, *huaqiao* universities, *huaqiao* hospitals, *huaqiao* museums, *huaqiao* associations, etc.

Related terms are *guiqiao* -- overseas Chinese returnees to China, and *qiaojuan*, or *qiaoshu* -- family members and relatives of *huaqiao* and *guiqiao*, who currently live in China and who might live on economic support from their *huaqiao* and *guiqiao*. *Qiaojuan* also includes dependents of *tongbao*. The majority of *qiaojuan* are children, spouses, and elderly parents of *huaqiao*, *guiqiao* and *tongbao*.

Another term that frequently appears in this thesis is *qiaoxiang*, the native place of Chinese living outside of the Chinese mainland. It also extends to the native place of compatriots (*tongbao*). By referring to a *qiaoxiang*, there is general agreement that there are a considerable number of emigrants who have moved from China while maintaining connections with their places of origin or migration, and observable socio-economic influences of emigrants in the homeland (Zhou and Zeng, 2001:16). *Qiaoxiang* links between the place of destination and that of origin are crucial at this point, which maintain and stimulate economic, social and cultural interaction between the two poles (Williams, 2002; You, 2000). Geographically, *qiaoxiang* is quite flexible in its extent. It can refer to a village, a township, a county, a city, or a whole region. For instance, Taishan is a famous *qiaoxiang*, as indeed is the entire Pearl River delta. Guangdong and Fujian provinces are also regarded as *qiaoxiang*. The term *qiaoxiang* has been so widely used in Chinese since 1949 that some scholars directly introduce the *pinyin* form of *qiaoxiang* into English, instead of hometown or native place of overseas Chinese (Chen and Ding, 2006:2; Douw *et al.*, 1999; Williams, 2002, 2004).

Scholars have, however, pointed out that the meaning of *huaqiao* and, to a lesser degree, *tongbao* are problematic, as they may not be suitable for and accepted by those living out of the Chinese Mainland since they carry some political implications (Bolt, 2000:14; Cheng and Ngok, 1999:113-114; Fitzgerald, 1972:X; Johnson and Woon, 1997b:32; Wang, 1991:6-8). When referring to overseas Chinese (*huaqiao*, *huaren*, or *huayi*), some have suggested the use of the term “ethnic Chinese” (Bolt, 2000:14; Suryadinata, 1997) or “Chinese diasporas” (Lever-Tracy, 1996; Ma and Cartier, 2003). The term “ethnic Chinese” may be associated with the idea of being demographic and/or cultural minorities in a host country, often with the assumption that they occupy a subordinate or inferior social position. Yet in Singapore, for instance, Chinese are both demographically and socially dominant, and the majority of them have citizenship and identity with the Singapore state. Thus there are virtually no *huaqiao*, and the term “*huaren*” or “ethnic Chinese” is inappropriate (Wang, 1998:25). The concept of “diaspora,” originally referring almost exclusively to the experiences of Jews who had dispersed throughout the world after the fall of Jerusalem after 64 A.D., remaining as aliens in a array of cultures for nearly 2000 years, usually connotes some unpleasant episodes – forced displacement, victimization, alienation, and loss of roots and identity (Vertovec and Cohen, 1999:xvii). The term has been applied to Chinese émigré who have also become widely dispersed in the past two or three centuries. There are some similarities in the diasporic and excluded experiences of both Jews and Chinese, but whereas Jews had no homeland until 1948, Chinese have always had a home nation. However, Chinese in Hong Kong, Macao and Taiwan are nevertheless diasporic in regards to their history and cultures. When studying Chinese in a specific country, many people address them as “X Chinese” or “Chinese X” by combining both the ethnicity and the citizenship. For

instance, Chinese with Canadian citizenship are identified or self-identify as Canadian Chinese (or Chinese Canadian). Although this type of address is definite and exclusive, it encounters practical difficulties when referring to Chinese as a whole living out of the Chinese Mainland. Also it is not fitting when referring to a Chinese who holds dual or multiple citizenships (like many Hong Kong citizens do). The problem is in creating a suitable term for those who are of Chinese origin, remain some sort of connection with the Chinese mainland, but are citizens of other countries.

Fortunately, the concept of transnationalism provides a solution for the dilemma and confusion discussed above. Schiller and her colleagues (Schiller *et al.*, 1992), realizing the limits and insufficiencies of the available conceptions to address migrants who physically move between nation-states and have a series of consequences from such movement beyond boundaries, have set up a new framework to understand international migration – transnationalism. Transnationalism is defined as “the process by which immigrants build social fields that link together their country of origin and their country of settlement” (Schiller *et al.*, 1992:1). Migrants who are involved in such social fields are labeled as “transmigrants.” This framework has cast new light on studies of international migration in three dimensions: (1) transnationalism bounds both the host country and original country, and emphasizes the characteristics of the movement of human beings, goods and ideas; (2) the experience of transmigrants is inextricably linked to the development of the world capitalism system, and must be analyzed within globalization; (3) transmigrants carry multiple identities (especially national, cultural, and ethnic) that link them simultaneously to more than one nation (Schiller *et al.*, 1992:8-12). Ong further points out that transnationalism can help individuals develop a flexible notion of citizenship as a strategy to accumulate

capital and power in the era of globalization (Ong, 1999:6). By flexible citizenship, Ong implies that transnationality can provide transnationals with a fluid and opportunistic response to changing political-economic conditions across boundaries.

Transnationalism has been increasingly applied by scholars to refer to the act of building up multiple links between the original country and resident country and beyond the nation and nationalism (Chrisman, 2003; Hiebert, 2003; Hitchcock, 2003; Portes *et al.*, 2002; Vertovec and Cohen, 1999; Yeoh and Willis, 2004). In the area of Chinese international migration, transnationalism is also well applied in depicting Chinese's physical movement, diaspora experiences, their multiple or hybrid identities, and the facilitated flow of ideas and goods (Chan, 2006b; Duara, 1998; Hsu, 2000a; Louie, 2000; Murata, 2001; Nyíri and Breidenbach, 2005; Tan, 2007). In my research, I will apply the transnationalism framework and, unless specified, label those who originate from China and maintain ties with China as "Chinese transnationals" or "Chinese transmigrants." By using these terms, I intentionally emphasize not only the flow of human beings, but also ideas and goods associated with the movement of people between China and other nations or areas. Thus overseas Chinese, *huaqiao*, *huaren* (ethnic Chinese), *tongbao* (compatriots), *guiqiao* (Chinese returnees) or members of the Chinese diasporas, with their inherent political implications and biases or academic flaws, are included in the general category of Chinese transnational as long as these people originate from China (the Chinese mainland), have built up certain types of links with China, and occasionally or frequently cross the national border to China.

### **Other Key Terms: Remittance, Donation, and Investment**

To avoid misunderstanding and misuse, it is necessary to clarify the meanings of three other key terms in this research - remittance, donation, and investment. The three concepts are always interconnected and overlap to some degree, but each has basic differences in terms of transaction target, function, and historic pattern. According to *The Oxford English Dictionary* (hereafter *Oxford*), "remittance" is "a sum of money sent from one place or person to another," "a quantity of some article sent in this way," or "the act of sending money, etc, to another place" (Simpson *et al.*, 1989:VIII, 594). *The Chambers English Dictionary* also explains remittance as "sending of money in payment or the money sent" (Allen, 1994:1062). The *Oxford* defines "donation" as "the action or faculty of giving or presenting presentation, bestowal, grant" or "the action or contract by which a person transfers the ownership of a thing from himself to another, as a free gift" (Simpson *et al.*, 1989:IV,951). "Investment" in this dictionary is summarized as "the investing of money or capital (for profits)"(Simpson *et al.*, 1989:VIII, 48). All the three terms describe a common feature – the action of transferring money or articles from a person/place to another. The definitions from the dictionaries emphasize the status of remittances as the action of sending money, according to which money of donations and investments sent by certain channels may also be categorized as "remittances." In other words, "remittances" include donations and investments if the latter two are transferred through sending.

In fact, some scholars (Li *et al.*, 1993:225; Wu, 1967:15; Xia, 1992:8 & 53; Zheng, 1940) view all volumes of monetary transfers sent by Chinese transnationals to China as "remittances" (*qiaohui*), no matter whether or not they are actually remittances, donations, or investments. They do, however, distinguish them from each other by looking at their

intended targets and what they are expected to achieve. "Remittances" sent by overseas Chinese to China are often categorized as (1) "family-supporting remittances" (*shanyang qiaohui*) -- remittances for living expenses, housing, and ceremonial and ritual expenses for family members and relatives; (2) "donation remittances" (*juanxian qiaohui*) -- remittances donated for charitable and public uses; and (3) "investment remittances" (*touzi qiaohui*) -- remittances for investment (Lin, 1998:211; Xia, 1992:53-71). Some scholars (Li *et al.*, 1993:225) in China denote "family-supporting remittances" as a narrow definition of remittances and all the three types together as a wide definition.

In this dissertation, I separate the three terms from each other because of their intended targets, expectations, and effects – the different social functions. Remittances are defined according to the so-called "narrow definition," that is, remittances only include monetary transfers from Chinese transnationals to their family members and relatives in the Chinese mainland for personal use, such as daily expenses, housing, clothing, ceremonies and rituals, and the purchase of land and other property. Donations differ from remittances in their public sector purposes. Money and gifts given by Chinese transnationals help create or improve social infrastructure in educational, health, or lineage activities. Investment differs from remittances and donations in its nature of searching for profits which will return to the investors, as private individuals with no public sector component. Yet, these three forms of financial input from Chinese transnationals are not always exclusive to each other. In some cases one form could be transferred for other functions. For instances, in history remittances were used to purchase/build extra houses/land, and then the houses/land were sublet or sold for profits. After 1949 as the CCP controlled China, land ownership was collectivized, and purchase and land was not allowed in general. Rural Taishan, people usually build new

houses for self-living rather than selling for profits. Remittances to individuals can also be donated for public uses. In all these cases, the monetary transfers, according to their final target, will be identified as one of the three forms.

In reality, Chinese transnationals not only send money to their family members or relatives in China, but also bring cash to their family members or relatives when they visit them. In the latter situation, there is no action of sending money. The phenomenon that cash is brought into China by Chinese returnees, go-betweens or other individuals/agents in history has been well documented by scholars (Hicks, 1993:177-179; Xia, 1992:13; Zheng, 1940:42-44). During the last two decades, the visits of *huaqiao* from overseas and *tongbao* from Hong Kong, Macao and Taiwan to the mainland are so frequent that bringing cash of the Chinese transnationals to their family members or relatives during the visits has become easier, due to the looser control of Chinese Customs on foreign cash brought by travelers. Thus, *yichao daihui* (or bringing cash instead of remitting) by the Chinese transnationals is regarded as a cheap and effective means to transfer money to China and at the same time to escape government monitoring, one of the aspects by which the Chinese government implements its financial policy of limited foreign currency control<sup>15</sup>. For Chinese transnationals who go to the Chinese mainland frequently, *yichao daihui* is common, especially in Guangdong and Fujian provinces, the two major points of origin of Chinese emigrants. Thus, in this thesis, remittances include money and gifts both sent and brought back by Chinese transnationals to their family members and relatives in the Chinese mainland for the latter's personal use.

*Qiaohui* is an abbreviation for *huaqiao huikuan*, which means overseas Chinese remittances in Chinese. Similar to the term *huaqiao*, *qiaohui* appears quite ambiguous and

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<sup>15</sup> In Chapter 5, I will discuss the effects of *yichao daihui* policy to the statistics of remittance volume to China.

problematic, as it is unclear as to who should be considered “*huaqiao*.” Scholars (Li *et al.*, 1993:225) have realized this dilemma, thus generally consider remittances from all *huaqiao*, *huaren*, and *tongbao* as *qiaohui* (overseas remittances). As discussed previously in this chapter, *huaqiao* is not always appropriate for referring to those who are Chinese emigrants or of Chinese origin living outside of the Chinese mainland. Similarly, *qiaohui* should be used with caution. The terms “overseas Chinese donations” (*huaqiao juankuan*) and “overseas Chinese investments” (*huaqiao touzi*) also contain political bias and ambiguity. Unless referring specifically to these concepts, I prefer to use the terms Chinese transnational (transmigrant) remittances, donations and investments to those of *huaqiao/tongbao* remittances, donations, and investments.

In the next chapter, I will introduce my field site and data sources, and discuss how the data are organized and analyzed under the guidance of this framework.



### **Chapter 3 Field Site, Data, and Research Methods**

This chapter will provide background and general information on this research. It begins with an introduction to the field site by outlining some historic, geographic, demographic, and socio-economic dimensions of Taishan, in the Pearl River delta of Guangdong province. Then I will introduce the sources of data and the research methods I employ in this dissertation. In the final part, I will discuss the limitations of this research.

#### **Field Site**

My research examines the economic influences of Chinese transnationals in Taishan of China after 1978, with a specific focus on Jianglian village at the Duanfen Township of Taishan. Taishan is located in the Southwestern corner of the Pearl River delta of Guangdong Province. The South China Sea lies to its south, Enping Municipality to its west, Kaiping Municipality to its north, and Xinhui District to its northeast (Map 1). It is close to three international ports, located 130 kilometers south-southwest of Guangzhou, 170 kilometers west of Hong Kong, and 119 kilometers west of Macao. With 77 various islands and several peninsulas, Taishan has a total area of 3,286 square kilometers, with a coastline of 587 kilometers in length. It contains Shangchuan Island and Xiachuan Island, the top two islands in the province, which are renowned for their picturesque beach resorts. Several mountains, numerous hills, and small river valleys and alluvial deltas characterize Taishan's topography. 16 percent of Taishan is covered by mountains, 40 percent by hills, and 44 percent by plains. Within the area there are 1.86 million *mu* of cultivable land, 1.99 million *mu* of forest and 0.42 million *mu* of water area (Editing Committee of Taishan Gazette, 1993:3). Like other

coastal regions in South China, Taishan is subject to subtropical weather which gives substantial precipitation, heat, and sunshine. Subtropical weather also has unpleasant effects – frequent storms, floods, typhoons from the South China Sea, as well as droughts, which often trigger emigration<sup>16</sup>.

Taishan has a long history. Archaeological artifacts dating back to the Neolithic period have been discovered within the region. Beginning from the West Han Dynasty (206 B.C.-24 AD), when Nanyue or Lingnan area (of which Taishan is a part) was brought under the subjection of the China Empire in the north, to the Ming Dynasty (1368-1644 AD), Taishan had been ruled by a number of administrative entities. Taishan's original name was Xinning (San Ning in Cantonese). Xinning County was officially established by the Ming in 1499. In 1867, due to ethnic conflict between the local Cantonese speakers and the Hakka, the county was split into Xinning County and Chixi Ting which was renamed Chixi County in 1912. In 1914, Xinning County was renamed "Taishan County" to avoid confusion since there were also three other "Xinning" counties in China at that time<sup>17</sup>. "Taishan" was named after a hill in the north of the county capital. This is why early Chinese immigrants and their descendants from this region called their place of origin Xinning (San Ning) and not Taishan<sup>18</sup>. Chixi County was abolished and merged into Taishan County in 1953. Taishan County was renamed Taishan Municipality, a county-level city, on May 28<sup>th</sup>, 1992. Taishan Municipality, together with Kaiping (Hoi Ping) Municipality, Xinhui (San Wui) District, Enping (Yan Ping) Municipality, and Heshan (Hok San) Municipality, is under the

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<sup>16</sup> More details of the reasons for emigration in this area will be discussed in Chapter 3.

<sup>17</sup> The other three were Xinning County in Hunan Province, Xinning County in Guangxi Province, and Xinning County in Sichuan Province.

<sup>18</sup> In this dissertation, except when specifically addressed, the term "Taishan" is used when referring to either Xinning or Taishan. The people living in Taishan or speaking in Taishan dialect are considered "Taishanese."

administration of Jiangmen, a prefecture-level administrative entity, which is one of China's famous departure points for Chinese emigrants. The former four counties of Taishan, Kaiping, Enping and Xinhui, the ancestral points of origin of the great majority of Chinese in the Americas, especially the US and Canada, were historically referred to as "Siyi" or Sze-yap in Cantonese (Four Districts) <sup>19</sup>.

By the time Xinning County was established in 1499, it had 203 villages. In 1867 when Chixi separated, the number of villages in Taishan was 633. After Chixi reunified with Taishan in 1953, Taishan consisted of 20 administrative districts (Editing Committee of Taishan Gazette, 1993:42-44). Taishan Municipality, hereafter Taishan for short, now administers 28 towns, 4628 villages, and about one million residents (Huang, 2005). Statistics show that the population of Taishan had been steadily increasing from 1949 to the late 1990s (See Table 3.1). However, since then, population growth has stagnated or even slightly shrunk. Yet, it is unclear if this is due to China's rigid family planning or the drainage of emigration, or both, since no figures on total emigrants has been made public by local authorities.

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<sup>19</sup> Together with Heshan Municipality, which is also an original place of some Chinese emigrants, Jiangmen City is referred to as Wuyi, the five districts. But Wuyi is not as popular as Sze-yap among many overseas Chinese communities.

Table 3.1 Taishan Population in Selected Years

Year	Population			Household Number
	Total	Male	Female	
1949	574,004	264,040	309,865	169,842
1950	583,932	269,358	314,574	173,297
1955	670,694	320,178	350,616	185,742
1960	690,588	334,160	356,428	176,054
1965	757,435	377,384	380,051	181,315
1970	845,994	424,925	421,069	194,972
1975	907,896	460,755	447,141	201,089
1980	934,981	47,7897	45,7084	203,686
1985	948,614	48,9095	45,9519	22,0324
1990	983,471	507,726	475,745	--
1995	1,009,718	520,279	489,439	--
1999	1,006,990	515,910	491,080	--
2003	986,373	505,318	481,055	--
2004	990,838	506,375	484,463	--

Sources: Figures are compiled from different sources (Editing Committee of Taishan Gazette, 1993; Guangdong Provincial Bureau of Statistics, 1991, 1996, 2000, 2004, 2005).

As a part of the Pearl River delta where Cantonese is commonly spoken, Taishan is unique not only for its large number of overseas emigrants<sup>20</sup>, but also for its dialect. Taishan dialect, or Taishanese, is often regarded as a branch of, or merely accented Cantonese. There are many similarities between Cantonese and Taishanese in terms of terminology, pronunciation, and grammar. Yet, Cantonese is not a homogenous regional dialect and varies according to location. The standard Cantonese is called *Guanhua*, *Shenghua* or simply *Baihua* (Common Speech), which is spoken mainly in Guangzhou (Canton) and its adjacent areas, Hong Kong and Macao. In other places of the Pearl River delta, local dialects may differ from *Baihua* to varying degrees, like the Shunde, Zhongshan and Dongguan dialects, for instance. In any situation, standard Cantonese is used as *lingua franca* at least in the Pearl River delta (including Hong Kong and Macao), much of western Guangdong and the lower Xijiang Valley in the northwest. Taishanese phonology is very similar to Cantonese, however, its pronunciation and vocabulary differ, sometimes greatly (See examples of Table 3.2)<sup>21</sup>. Taishanese and Cantonese are not necessarily mutually intelligible. Due to Cantonese dominance, most Taishanese vernacular speakers can understand spoken Cantonese, but Cantonese speakers cannot easily understand Taishanese. As Taishanese people are ubiquitous in many Chinese communities across North America, such as San Francisco, Oakland, and Vancouver, Taishanese dialect is still spoken everyday in North American Chinatowns.

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<sup>20</sup> In chapter 4 I will discuss the history of Taishanese transnationals and explain why they choose to emigrate.

<sup>21</sup> Mandarin, Cantonese, and Taishanese use the same written form, regardless of whatever differences.

Table 3.2 Difference of Pronunciation among  
Mandarin, Standard Cantonese, and Taishanese

<i>English</i>	<i>Mandarin</i>	<i>Cantonese</i>	<i>Taishanese</i>
<b>Taishan</b>	Taishan	toi-san	hoi-san
<b>Duanfen</b>	Duanfen	Dun-fen	Un-fun
<b>We/us</b>	Wo-men	ngo-dei	ngoik
<b>You (plural)</b>	ni-men	nei-dei	kek
<b>They/them</b>	ta-men	koei-dai	kek
<b>Big</b>	da	dai	ai
<b>Canada</b>	Jia-na-da	Ga-na-dai	Ga-na-ai

Compared to the center of the Pearl River delta and the Guangzhou-Hong Kong and Guangzhou-Macao corridors, Taishan is less economically developed and agriculture occupies a higher proportion in the overall economy than that of the central area and eastern wing of the Pearl River delta<sup>22</sup>. In recent years, Taishan's economy has seen growth in industry; the secondary industry has become the economic backbone of Taishan. Major economic indicators are compiled in Table 3.3<sup>23</sup>.

<sup>22</sup> In the last several chapters, I will fully explore the influences of Chinese transnationals' remittances, donations, and investments on the economic development of Taishan.

<sup>23</sup> For more economic indicators of Taishan over time, please refer to Appendix 5.

Table 3.3 Major Economic Indicators of Taishan in 2004 (Unit: *Yuan*)<sup>24</sup>

Indicator	Value
GDP	14.1 billion
Per capita GDP	14,310
Primary Industry GDP	2.02 billion
Secondary Industry GDP	6.35 billion
Tertiary Industry GDP	5.77 billion
Industry gross output	26.1 billion
Local government budgetary revenue	385.99 million
Local government expenditure	667.26 million

Source: Compiled from Guangdong Statistical Yearbook 2005 (Guangdong Provincial Bureau of Statistics, 2005)

Duanfen Township is one of the sending points of Chinese emigrants from Taishan<sup>25</sup>. Located in the middle-southern part of Taishan, Duanfen is 27 kilometers south of Taicheng, Taishan's capital, and about a 20 minute drive to Guanghai (Kwong Hoy in Cantonese), Taishan's sea gateway (See Map 2). Duanfen was named after the Duan Mountain and Fen River in the region. With a total area of 300 square kilometers, Duanfen Township administers 37 administrative villages, including Jianglian Village, and two residential committees (*Juwei hui*) (Duanfen Township Government, 2005:34). The total population of Duanfen is 50,200 with 13,197 households (Duanfen Township Government, 2005:38-39). In

<sup>24</sup> According to China's statistic tradition, the primary industry includes agriculture, forest, fishing, stock-raising, and their affiliated sectors. The secondary industry mainly includes raw material manufacturing. Tertiary industry refers to the service sector.

<sup>25</sup> For more information of Duanfen's emigration history, please refer to Chapter 4.

2001, Longwen Township, Duanfen's southeast neighbour, was administratively abolished. Part of Longwen was merged into Duanfen, causing a sudden surge in Duanfen's population and an increase in area to the south. Its estimated total population in 2005 was nearly 60,000 (Duanfen Township Government, 2005:34). The town government is located at Shandi Marketplace, the commerce center of the local community. There are also other four marketplaces distributed in Duanfen. Newly built highways have linked Duanfen with other parts of the region and major cities in the Pearl River delta. It only takes an hour and half by highway to get from Duanfen to Guangzhou, the provincial capital.

There are eight ethnic groups living in Duanfen: Han, Zhuang, Yao, Miao, Buyi, Hui, and Dong. Ninety-nine per cent of the residents are Han Chinese, and there are 111 Chinese surnames in the Township region. The three most common surnames are Mei (Mui or Moy in Cantonese) -- 21 percent of the total population, Chen (Chan in Cantonese) -- 13 percent, and Huang (Wong in Cantonese) -- 8 percent (Duanfen Township Government, 2005:39). The Mei people are scattered throughout many villages in the region and it is said they live nowhere outside of Duanfen in the Siyi area (Zhang, 2005c:156). People with the same surname in a village are often part of an extended kinship group and form a lineage, build ancestral halls and graves, record their genealogy, hold ancestral ritual ceremonies, and even publish lineage association newsletters. These were serious political liabilities forbidden and attacked during the Cultural Revolution but have been restored in the post-Mao era. The lineage revival in this region since the 1980s relies on an increasing participation of the Chinese transmigrants in Duanfen's domestic affairs, whose out-migrants have moved abroad since the eighteenth century (Johnson and Woon, 1997b:51-53). In Duanfen, the Mei (Moy) lineages and associations have been influential in local issues, not only because they



are historically the dominant surname responsible for creating and occupying several important marketplaces<sup>26</sup>, but also because currently many key official positions at both village and township levels have the surname Mei. In recent years, the Mei throughout the world, especially from many Chinese communities of metropolitan areas in North America, have been active in organizing worldwide networks and hometown visits (Mei, 2000:32-52).

The first emigrant who moved abroad from Taishan was originally from Duanfen. Over the past two hundred years, waves of migrants ventured to Southeast Asia, Australasia, the Americas, and Europe to settle down. About 40,000 persons from Duanfen left China between 1979 and 2000. An estimated 110,000 people and their descendants originating in Duanfen are now scattered throughout more than 50 countries and areas (Duanfen Township Government, 2005:97). The Overseas Chinese Affairs Office (*Qiaoban*) of the Duanfen Township Government is responsible for issues related to Chinese transnationals. It also publishes a semi-annual journal, *Runan zhihua* (The Nei Mam's Flower), and sends it to overseas communities. The journal, started in 1931, has been financially sponsored by overseas emigrants for more than seven decades.

Agriculture provides Duanfen's economic backbone as nearly 90 percent of its population engages in agricultural production (Duanfen Township Government, 2005:39). Rice cultivation is the major economic activity; banana, vegetable and pond fisheries provide sideline sources for the local peasants. To speed up its industrial development, the township government set up the Longshan Foreign Investment Zone in 1999 and the Fengshan Industrial Zone in 2003. The two zones have attracted a number of manufacturing investments. As several industrial factories and companies raising eel have chosen to locate

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<sup>26</sup> According to Johnson, the Meis struggled with the Jiang (*Gong* in Cantonese) in Jianglian village over the control of a major market in the east side of Duanfen River in the 1930s (Johnson, 1998).

in Duanfen, more and more immigrant workers from the hinterlands and other provinces economically poorer than Duanfen, have moved to Duanfen to work. In 2004, Duanfen even accepted more than twenty displaced migrant families from the Three Gorges, the site of the Three Gorges Reservoir project, China's largest hydro investment<sup>27</sup>. Thus, due to the constant in-migration and out-migration, people living in this region are linked both internally behind and externally beyond, and the population is no longer ethnically and culturally homogeneous.

In Jianglian (*Gongluen* in Cantonese) Village, three questionnaire surveys were conducted as part of this research. The village is located in the southeast of Duanfen, and occupies 2,197 *mu* of land (See Map 2). Stretching onto the Duanfen River plain, most of its land is arable. Rice, banana and sugar cane are its major agricultural products. In 2004, there were 507 households and 2,011 residents in Jianglian Village. It currently consists of seven Village Groups (*Cunmin xiaozu*)<sup>28</sup>: Dadun, Dayangmei, Jiujia, Bajia, Gaoyang, Duimianyang, and Dongbi (Duanfen Township Government, 2005:194). Dongbi in the west Jianglian village neighbors Shandi marketplace, the location of the town government. Each of these village groups is a small geographical settlement historically dominated by villagers of one surname. The Jiang (Gong in Cantonese) is the most popular surname; the Chinese name of Jianglian means United Jiang. Other family names in the village include Chen, He (Ho in Cantonese), Li, Liang, Wu, and Ruan. Jianglian villagers have enormous overseas connections. According to the local records, more than 2300 immigrants who have originated

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<sup>27</sup> Under this project, 1.15 million residents in the Three Gorges are planned by the Chinese government to abandon their homes and migrate elsewhere. In Taishan, 701 of such migrants had moved by 2004 (news from South News Network at <http://www.southcn.com/news/dishi/jiangmen/shizheng/200408160242.htm>, accessed on April 14, 2006).

<sup>28</sup> In rural areas, the villager group is the bottom unit that the administrative influence can reach. From the bottom to the top along the Chinese administrative hierarchy are the villager group, village, Township (or Xiang), County (or county-level Municipality), prefecture city, province, central government.

from Jianglian village have scattered throughout dozens of countries and areas including the US, Canada, Australia, New Zealand, France, Hong Kong, and Macao (Duanfen Township Government, 2005:194). Dayangmei Village, for example, has over 800 people overseas who originated from the village<sup>29</sup>. It is reported that forty percent of the houses in Jianglian stand empty due to extensive out-migration (Johnson, 1998:319). To maintain solid contact with its Chinese emigrants, the Jianglian Village Committee has irregularly published a booklet, *Jianglian Xiangyin* (Jianglian Hometown Voice) since 1982 and has circulated it among its overseas communities.

### **Data Sources and Research Methods**

This dissertation originated from my involvement in the research projects of Dr. Graham Johnson, my principal advisor. Since the early 1970s Dr. Johnson, and later on some of his colleagues, have focused on the Pearl River delta, viewing it as a window to understand China's rural economic strategies and its process of social transformation in a global context (Johnson and Johnson, 1976; Johnson, 1982, 1989, 1992, 1993, 1994, 1999; Johnson and Woon, 1997a, 1997b, 1998; Tan, 1988). With support from local authorities in China, Dr. Johnson purposely selected five villages or production brigades in early 1970s, for his studies, one of which was Jianglian. Jianglian came into his view largely because it was one of the major original points of many Chinese immigrants in North America who had extensive connections abroad<sup>30</sup>. At this point Jianglian was considered a representative case in the west wing of the delta as it shared similarities with many other villages in the region in

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<sup>29</sup> Fieldwork notes of an interview of the leader of Dayangmei village group in January 2005.

<sup>30</sup> The other four villages and the reasons they were selected by Johnson are: Wentang village in Dongguan for its famous rice and lychee production, Qiangang village in eastern suburb of Guangzhou for its famous orange plantation, Yahu village in northern suburb of Guangzhou for its combination of rice and vegetable production, and Nanshui village in Shunde for its pondfish and silk production.

several dimensions— economically dominated by traditional agriculture, relatively less industrially developed compared with that of the central delta and Guangzhou-Hong Kong corridor, economically supported by remittances and donations from Chinese transnationals, highly influenced by western style architecture, frequently visited by Chinese transnational migrants and the site of waves of emigration over the past century and half. Johnson's research on the five villages began in 1973, when he was identified by the Chinese government as a "friendly international scholar," and given permission to enter these sites in Guangdong. Since 1979, he has made at least one short visit to the five villages every year to make observations. To obtain original micro-data on the economic strategy, kinship network, family composition, and other demographic information at the local household level, three questionnaire surveys were conducted under his direction in 1986, 1994, and 2000.

The questionnaires partially contain efforts to acquire information about overseas Chinese, such as overseas connections, whether or not a household was receiving overseas remittances, the frequency and volume of the remittances, and visits of overseas Chinese (See Appendix 2 for related information about the questionnaire). Questionnaires of the last two surveys were slightly different from those of the first in terms of the arrangement of the questions and particular topics, since a large proportion of the local villagers began to engage in non-agricultural jobs when the coastal regions in China were overwhelmed with rapid industrial transformation in the later 1980s. Yet questions related to Chinese transmigrants remained the same. To address the increasing numbers of labour migrants moving to the Pearl River delta in search of employment opportunities, the last survey uses a new type of questionnaire designed to target this group of people who are often considered by the local

residents as “outsiders”<sup>31</sup>. As these migrant workers were non-Taishanese and usually had no overseas immigrant relatives, their questionnaire did not contain any questions on Chinese transmigrants. Each questionnaire consisted of four parts: composition of family and kinships, education, economic activities, and family livings. Most questions were open-ended; however, there were some that were semi-closed or closed.

I was fortunate to get involved in Dr. Johnson’s projects while he was to conduct the third survey<sup>32</sup>. In 1999, he invited me to join his project team. That December, I accompanied Dr. Johnson on a trip to the five villages, which marked my first visit to Jianglian village. In July 2000, we made another visit to the villages. From October to December 2000, the third questionnaire survey was conducted with the assistance of six interviewers who were Cantonese-speaking undergraduates of the Zhongshan University of Guangzhou. Under Prof. Johnson’s supervision, I was in charge of the fieldwork. Since entering my doctoral program at UBC in January 2001, I have completed four follow-up field trips with Dr. Johnson to Jianglian village -- July 2001, December 2001, June 2002, and January 2005. Each time, we spent several days in Taishan and Duanfen, and sometimes in Jiangmen City, interviewing the local peasants, migrant workers, village key figures, government officials, and the Chinese scholars for update information. We also visited related government offices and non-governmental organizations including the local lineages.

Questionnaires from the first and second surveys were coded right after they were finished. As a research assistant, I coded the questionnaires from the third survey and entered the data into SPSS, completing this by the end of 2001. In 2002, I began to perform some

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<sup>31</sup> For the study of the labour migrants in the survey, please refer to *Partners, Neighbours, Yet Outsiders -- Understanding Labor Migrants in the Pearl River Delta* (Johnson and Zhang, 2006).

<sup>32</sup> The projects were “Social Economic Transformation in South China” and “Continuing Transformation of the Pearl River Delta Region, Guangdong Province, South China: Insiders and Outsiders in an Increasingly Globalized Context”. Both were sponsored by SSHRC.

preliminary statistical analyses. I have concentrated on the available data and information of Taishanese transnationals. With gracious permission and generous support from Dr. Johnson, I have been granted access to all the data gathered from the three surveys, in addition to documents and other information he collected during his field trips for use in my own research. I extracted the data on Chinese transnational remittances from the first and the third questionnaire survey in Jianglian to explore the general patterns of remittances from abroad in the last two decades. These analyses were used in a conference paper, "*Overseas Connections, Dollars, and Household Strategy: Influences of Overseas Chinese Remittances in South China*," presented at "The Inaugural Graduate Seminar on China" held in the Chinese University of Hong Kong between January 13<sup>th</sup> and 15<sup>th</sup>, 2005<sup>33</sup>, during which I received insightful comments and suggestions. This paper was the prototype of Chapter 4 in this dissertation.

Obviously this study requires both quantitative and qualitative methods. With regards to the analyses of the remittances sent by Chinese transmigrants and the local household economic situation, this thesis heavily relies on data from the three surveys. To obtain additional information, I have taken advantage of three qualitative methods – document study, in-depth interview, and observation.

The three questionnaire surveys conducted over fourteen years from 1986 to 2000 are part of a longitudinal study, a comparative perspective of the long-term trend of a population. They comprise a trend study, during which different individuals were sampled within the same population frame in the same site for the same research purpose (Bailey, 1994:36-37). Another type of longitudinal study is a panel study that targets the same samples and follows

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<sup>33</sup> This seminar was co-organized by South China Programme of Hong Kong Institute of Asia-Pacific Studies and the Universities Service Center for China Studies.

them throughout different periods. This longitudinal study utilized trend sampling rather than panel sampling due to problems of “panel mortality” – the loss of samples during the course of the study. Due to the high rate of emigration in the village, as previously discussed in this chapter, and the changes in household registration status and population mortality, panel mortality would have been high in a village of around 500 households. The trend study ensures each survey will have enough cases of each survey wave.

During each survey, several university students were chosen, trained as interviewers, and sent together to each village. In each village, the household register (*Hukou dengji ce*) was obtained from the local police station (*Paichusuo*) in each township, which is responsible for social security and population registration issues. In the police station, there is a general household register of each village, which contains a list of the names of each household head, their *Hukou* registration status, and detailed demographic information of each family<sup>34</sup>. Interval (systemic) sampling was used to obtain random samples for each survey. In the 1986 survey, 100 households were selected from a population of 498 households. In 1994, the number of interval samples was 54 out of 489 households and 75 households of 510 were successfully interviewed in 2000<sup>35</sup>. In the case that a sample would be unavailable or unwilling to participate, a waiting list of several samples was prepared from a second interval sampling. All questionnaires of the surveys were filled by the interviewers who conducted face-to-face interviews with the subjects. Under assistance of the village cadres, an interviewer attempted to reach the household head of each sample to ask the questions. When the head was unavailable, his/her spouse or any adult available in the

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<sup>34</sup> For more information of the origin and dynamics of China's Household Registration system (or *Hukou* system) in China, please refer to the studies of Cheng and Selden, and Mallee (Cheng and Selden, 1994; Mallee, 1995). A comprehensive discussion of the system can also be found in Solinger's book (Solinger, 1999).

<sup>35</sup> The total sample population of each survey was determined by Prof. Johnson on the basis of financial budget and the length of time of the whole survey at the five villages.

family would be interviewed instead. Most of the interviews took place at the participants' homes during lunch or dinnertime when the majority of interviewees, most of whom were local peasants, were free from farming or other physical work. Some interviews were conducted in the headquarters of the village, a grocery store, or a teahouse on the condition that the interviewees were reached there and felt comfortable with the interview.

The response rate of each survey was 100 percent, and the substitute list of samples was never used. In each survey there was at least one student interviewer born in Jiangmen, who spoke both fluent Cantonese and Taishan dialect. He/she would act as the translator in case there was a language communication problem. On average, it took approximately one and half hours to complete an interview. The socio-demographic characteristics of the respondents in each survey are shown in Table 3.4.

Information directly and indirectly related to Chinese transnationals was extracted from the data sets and were statistically analyzed<sup>36</sup>. I focused on several broad types of information: transnational connections, remittances, household incomes, and household life styles and economic strategies. Each type can be identified in several variables. With the available data, I have done some descriptive analyses, of which the major results can be found in Chapter 5 of this dissertation. Quantitative methods are also used in other chapters when statistical analyses were necessary.

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<sup>36</sup> For questions on Chinese transnationals in the second and third questionnaire survey, please refer to Appendix 2.



**Table 3.4 Socio-demographic Characteristics of the Survey Samples**

Survey Item/Variable	Response Categories	Distribution		
		1985	1994	2000
Sex	Male (N, %)	71 (71.0)	45 (83.3)	58 (77.3)
	Female	29 (29.0)	9 (16.7)	17 (22.7)
Age	Mean (N, SD)	51.6 (9.8)	48.4 (11.8)	55.0 (13.3)
Marital Status	Married (N, %)	59 (59.0)	52 (96.3)	66 (88.0)
	Unmarried	4 (4.0)	1 (1.9)	1 (1.3)
	Widow/widower	37 (37.0)	1 (1.9)	6 (8.0)
	Divorced	0 (0)	0 (0)	0 (0)
	Separated	0 (0)	0 (0)	2 (2.7)
Education	Illiterate (N, %)	14 (14.0)	2 (3.7)	2 (2.7)
	Some primary school	64 (65.0)	18 (33.3)	35 (46.7)
	Completed primary school	1 (1.0)	15 (27.8)	9 (12.0)
	Junior middle school	14 (14.0)	12 (22.3)	16 (21.4)
	Upper middle school	5 (5.0)	6 (11.1)	12 (16.0)
	Post-secondary	1 (1.0)	0 (0)	1 (1.3)
Occupation	Peasant (N, %)	80 (80.0)	48 (88.9)	50 (66.7)
	Worker	2 (2.0)	1 (1.9)	6 (8.0)
	Cadre	2 (2.0)	1 (1.9)	15 (25.8)
	Businessman	0 (0)	2 (3.7)	12 (22.3)
	Retired	16 (16.0)	1 (1.9)	1 (1.3)
	Household wife/no job	0 (0)	1 (1.9)	6 (8.0)
	Student	0 (0)	0 (0)	1 (1.3)

Documentation is essential for any academic study, and this research is no exception. Much of Chapter 4 of this dissertation showcases my efforts in documentation research. UBC is proud of its collection of Asian materials, including Chinese materials, in its library system, and this research has greatly taken advantage of its resources. For instance, in the

Asian Library some Chinese local gazettes such as Taishan Gazette and many other archival materials of Chinese Canadians are available. Right before and after "The Inaugural Graduate Seminar on China," I spent ten days doing documentation research in the Universities Service Center for China Studies, the best place in the world for contemporary Chinese materials for scholars, and the Chinese Overseas Collection in the University Library, where I got some scholarly works unavailable in Vancouver. During each field trip, Prof. Johnson and I visited the local government to obtain unpublished official reports and statistics, museums, bookstores, and libraries, when possible. Since the mid-1980s, Prof. Johnson has subscribed to *Taishan wenshi* (Taishan Culture and History) published by the Taishan Political Consultative Conference, *Runan zhihua* (The Nei Nam's Flower) published by the Duanfen Overseas Chinese Affairs Office, and Guangdong Province Yearbook. He gave me access to these materials since the *Taishan wenshi* and *Runan zhihua* were most likely unavailable in any library in North America. These were invaluable resources allowed me to trace the dynamics of Chinese transmigrants' donations and investments from a local perspective. During my last trip to Duanfen, I was given an electronic copy of the draft of *Duanfen zhenzhi* (*Duanfen Gazette*) by the officials in the township government. During his visit to Vancouver in May 2005, Prof. Weiqiang Mei, a prominent overseas Chinese expert in Wuyi University of Jiangmen, brought me a copy of several draft chapters of *Taishan huaqiao zhi* (*Taishan Overseas Chinese Gazette*) for which he was writing. For me, the drafts of these two books were invaluable.

Conducting in-depth interview was my major task of each post-survey visit in Taishan. Most interviews were conducted following a guideline using structured and semi-structured questions. From my first trip in Taishan to the last, I conducted 15 interviews with

local peasants, three with lineage leaders, eight with village cadres, 12 with government officials, and six with local scholars. Some of the interviewees, such as officials in the township government and village cadres in Jianglian village, were interviewed more than once. Interview topics varied with different interviewees in different circumstances. With local peasants, my questions concentrated on how the remittances and donations from outside changed their family life. When facing village cadres and government officials, I would ask about the general situation of the donations and investment from Chinese transnationals and the changes that arose under such external inputs. I would focus on lineage revival activities when I interviewed lineage leaders. Such interviews took place in various locations -- offices, individual houses, restaurants or teahouses, grocery stores, and even by rice patch fields. Sometimes I just took casual conversations without an interview guide when I encountered potential individuals who could provide important insights. During my fieldwork, semi-structured interviews were administered to local cadres and key informants in the village.

Unstructured and non-participant observations were also employed during each of my visits to Taishan. The time restraints of my visits, made it impossible for me to engage in structured and long-term ethnographic observation. I did not deliberately choose subjects for observation. I paid attention to interesting things whomever I met, and whatever I saw, and wherever I went. Sometimes I just took a walk in the village, hung around in the local marketplace, or observed other local customers while I was eating in a restaurant. After each day's visit, I wrote notes of what I had observed during the day, recorded observations which I thought would be useful to my research. For instance, during the last questionnaire survey when I visited the sample households and talked with individuals, I paid special attention to the residential houses, the interior decor and the demeanor of the family members. I could

easily see the manifest influences of the remittances from Chinese emigrants – big two- or three-storey buildings which gave families more than enough space to live in, luxurious decorations within the houses, expensive furniture and electronic appliances, and the pride on the faces of the interviewees when they talked about their overseas family members and relatives. Every time I visited the township government, I would see something recently donated by Chinese transnationals. In my first visit, I was surprised to see how much of the office furniture was purchased with donations evident from the painted names of the donors on each item – desks, chairs, sofas, air-conditioners, water boilers, and even bathroom mirrors. During my last visit with Prof. Johnson in Duanfen, we took a minivan, a new Toyota Sienna sent by township government, to the villages. On both sides of the van several huge Chinese characters were painted: “Donated by an American fellow couple of Mr. Mei and his wife.” I have been so amazed by the images of the landscape, settlement, and lifestyles in Taishan brought about by the influences of Taishanese emigrants. This has inspired me to further explore the stories behind the images.

### **Limitations of This Study**

One flaw of this study may be the statistics data of household remittances in the three surveys. When Dr. Johnson initiated his survey work in the Pearl River delta, he aimed to collect the demographic and socio-economic information at the local household level in the five localities in the Pearl River delta during China's reform era. The subject of transnationals and their influences was not the sole focus of these surveys. Questions related to Chinese transnationals were scattered throughout the questionnaire. Only in the data from Taishan did I find the potential topic which was eventually developed into a part of this

dissertation. Also, I had no involvement in or control over the preparatory stages of each survey – identifying research problems and formulating hypotheses, and designing the questionnaires. Hence not surprisingly, some variables that might have made this research more comprehensive are absent<sup>37</sup>. This unrecoverable data-deficiency may undermine the comprehensiveness of this research on the topic. However, the flaw should not affect the validity and reliability of the available data in this study, as the data were scientifically collected, processed, and analyzed with accuracy to the best of my ability. This research, especially the part on overseas remittances, attempts to provide a better understanding of the influences of Chinese transnationals from a household level in the past two decades. I have also tried to make up for the deficiency of the quantitative data in my qualitative research which I had control over. For example, the overall input volume of remittances in the local community can be obtained by documentation method, and the effects of remittances on housing and daily life can be found through in-depth interview and observation methods.

Another drawback of this research might lie in how representative Taishan is of *Qiaoxiang*, hometowns of overseas Chinese, in Guangdong and perhaps in China. In other words, to what extent does Taishan in this research share similarities with other *Qiaoxiang*, and to what degree does Taishan differ? Admittedly, this is a tough question that a study of this scope could never fully answer, since it only focuses on Taishan, with reference from the west wing of the Pearl River delta. Whatever quantitative data that have been collected in Taishan, Taishan on its own can be regarded as a case study which, as a methodology, is often criticized for the dependence on a limited number of cases and incapability of providing generalizable conclusions (Hamel *et al.*, 1993; Yin, 2003). However, as frequently

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<sup>37</sup> For instance, the number of transnational ties of a household and the income level of the remitters. It could be hypothesized that remittances are positively correlated to the number of transnational ties.

compared with the Siyi (Sze-yap) -- the west wing the Pearl River delta, and the East wing the delta -- the original point of many *Tongbao* (compatriots) in Hong Kong and Macao, and the south coastal region in Fujian Province -- the sending place of many Chinese in Southeast Asia, Taishan is discussed throughout this research in order to reveal its characteristics of the socio-economic transformation in the reform era under the intensive influences of external monetary input. Hence, throughout this research, I try to answer this arduous question.

## **Chapter 4 History of Taishanese Emigration and China's Policies toward Chinese Transnationals after 1978**

In this chapter, I will provide a historical overview of out-migration from Taishan. China's policies toward Chinese transnationals during the reform era will also be briefly explored. I shall first illustrate how the Taishanese stepped out of China and scattered throughout the world, and discuss some of the internal and external social, economic and geo-political factors that triggered such mass out-migration from Taishan. I shall then examine the governmental policies of the People's Republic of China towards the Chinese transmigrants in the reform era, with particular references to Taishan. I will suggest that these policies have tremendously influenced the relationship between the Chinese transmigrants and their homeland and their willingness to become involved in China domestic issues. Finally I will discuss the implications of China's policy shift to both China and Chinese transnationals.

### **Origins and Flows of Taishanese Emigration**

Initially, Chinese migrants chose to move to Southeast Asia, which is close to China by way of the South China Sea. The beginning of Taishanese emigration can be dated to the late eighteenth century, during the mid-Qing, when it was still technically illegal for Chinese to leave China. According to local records, Chen Xuejin and his son, Chen Shebao, who went to Southeast Asia in 1774, were possibly the earliest Taishanese emigrants (Mei and Zhang, 2001:18). They were possibly traders, but how they migrated and how long they stayed at their destination is unknown. It is widely accepted that Mei Yaoxuan was the first Taishanese emigrant for whom there is a reliable record documenting that he left and stayed at a known

destination (Mei and Zhang, 2001:18; Taishan Overseas Chinese Affairs Office, 1992:261). He was born in Duanfen and was a carpenter in the *Nanyang* (Southeast Asia). By 1786, he was already living in Malacca. In the same year, Mei Yaoxuan moved to Penang as one of the first consignment of labourers “recruited” by British shippers. Mei managed to survive there, and a few more Taishanese, most of whom were carpenters and construction builders, joined him shortly after. In 1831, Mei helped found the Penang Ningyang Benevolent Association.

Another well-known Taishanese pioneer emigrant is Cao Yazhi, alias Cao Yazhu. He was born into a poor family in Duanfen in 1782, and finished several years of elementary education in his home village. Cao ventured to Macao to learn carpentry as a teenager. Introduced by a friend, he boarded an English ship and became a hired labourer to Penang in 1802. Seven years later, Cao followed the English troops of Stamford Raffles<sup>38</sup> and landed in Singapore. He gradually accumulated wealth, and became a leader in the local Chinese community and founded the Ningyang Company in 1822. This organization provided a gathering place for people from Taishan and as typical in an overseas Chinese context, the company was expected to meet Taishanese needs and to serve their interests (Hsu, 2000a:23; Mei, 2000:72; Taishan Overseas Chinese Affairs Office, 1992:261). Later, the Ningyang Company changed its name to the Ningyang Benevolent Association (Ningyang Huiguan) and even provided education for Taishanese children<sup>39</sup>.

It is certain that by the early 1800s, sizeable numbers of Taishanese had moved to the Malacca region and set up their networks and organizations. At the same time, Taishanese

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<sup>38</sup>Sir Thomas Stamford Bingley Raffles, 1781-1826, was the founder of the city of Singapore (now the Republic of Singapore), and is one of the most famous Britons who expanded the British Empire.

<sup>39</sup>For more information about Cao Yazhi and his Ningyang Benevolent Association, please refer to Jiangmen News Net at [http://www.jmnews.com.cn/c/2004/09/01/08/c\\_371329.shtml](http://www.jmnews.com.cn/c/2004/09/01/08/c_371329.shtml) (accessed on December 16, 2005).



also moved to other parts of Southeast Asia, such as Malaya, Vietnam, Thailand, Burma, and Indonesia, meeting some of the labour demands of European colonization in the region (Hsu, 2000a:24).

The tide of emigration from Taishan and China, more generally, changed its direction from Southeast Asia to North America and Australia after the first Opium War (1839-1842) as migrants were drawn to the gold rushes in these 'new worlds' during the 1850s and 1860s. It is believed that some Chinese had entered the United States as early as 1785, and there is a record of at least 13 Chinese living in the U.S. between 1820 and 1840 (Mei and Zhang, 2001:75). According to a local gazetteer of Guanghai (a seaport in southern Taishan), the first Taishanese in America was probably Chen Maoqi, alias Chen Qizong, who migrated to the US and died in California in 1841 (Mei and Zhang, 2001:75). During the gold rush in California, hundreds of Taishanese went to the United States to chase the "Gold Mountain" dream<sup>40</sup> (Hsu, 2000a; Mei, 1979). After gold became harder to find, large numbers of Taishanese entered the US and sought jobs in a variety of construction projects, most notably building railroads. By the 1870s, Taishanese in the US had moved into other occupations such as merchants, farmers, manufacturing workers, domestic servants, gardeners, fishermen and the like. Taishanese migrants spread to major cities across the United States and gradually became the dominant group in American Chinese communities, especially in Chinatowns (Hsu, 2000a:30).

With the influx of large numbers of Chinese into North America, there arose anti-Chinese sentiment in the US, a society dominated by a white population. For a variety of reasons, angry white men urged the government to forbid Chinese from entering the country.

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<sup>40</sup> "Gold Mountain" is a colloquial expression for the United States, particularly California, as in the early days Chinese immigrant moved there for their dream of finding gold and becoming rich. Later "Gold Mountain" also referred to Canada as the Gold Rush spread to British Columbia. Gold Mountain in Cantonese is "Gum Sam."

On May 6<sup>th</sup>, 1882, *The Chinese Exclusion Act* was passed, which banned the immigration of Chinese<sup>41</sup>. Chinese were the only people targeted and excluded from the United States because of their race and class (Chan, 1976). Chinese immigration became increasingly difficult over the following six decades. Only in December 1943, when the United States was allied with China in the war against Japan, was this notorious exclusion law repealed. During this period of exclusion, Chinese still managed to enter the U.S., many of whom were Chinese immigrants' family members, but also many who came illegally as "paper sons"<sup>42</sup>. According to Helen Chen, there were 168,659 Chinese who managed to immigrate to the United States during the 62 years from 1879 to 1940 (Chen, 1980:174) (See Appendix 3).

Canada was another significant destination in North America for Taishanese immigration. The first Chinese in Canada were possibly artisans who arrived in 1788 in the Nootka Sound area of British Columbia, possibly as part of an abortive settlement organized by Captain Mears. According the Chinese Canadian Head Tax Registers<sup>43</sup>, the first identified Taishanese in Canada was a four-year-old boy who was brought from San Francisco to Victoria in 1852. In 1858, Goon Wah, a 23 year-old male merchant, arrived in Victoria from Taishan (San Ning). When the gold rush spread along the Pacific coast from California north

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<sup>41</sup> However, the act permits six categories of Chinese to immigrate: teachers, students, tourists, properly certificated returning labourers, merchants and their family members, and diplomats and their families.

<sup>42</sup> Paper sons refer to those who are sons (native- or foreign-born) of Chinese American citizens living outside of the US. They had the right to US citizenship and were required to bring their identical certificate upon entry into the US. For information, please refer to Chin and Hsu (Chin, 2000; Hsu, 1997).

<sup>43</sup> The author is currently a chief research assistant of "The General Registers of Chinese Immigration" project supervised by Dr. Peter Ward and Henry Yu in the Department of History at the University of British Columbia. The Library and Archives Canada hold the General Registers of Chinese Immigration 1885-1949 (RG 76 D2a), which were produced as microfilms (Reel number C-9510, C-9511, C-9512, C-9513, T-3484, T-3485, and T-3486). The first purpose of this research project is to input all the entries of the Chinese immigrants of the Registers into electronic files to create a searchable online database. The second purpose is to analyze the statistics to determine the characteristics of the demographic features of the immigrants (such as the original places, occupations, etc), the circulation flows of the migration, total amount of head tax paid by the individuals, and height of anthropometry of the Chinese immigrants. This research is currently in its first stage. In this dissertation, unless the source of citation is acknowledged, the information on the Chinese Canadian Head Tax is from this author's project data.

towards British Columbia, Taishanese gold miners followed this route into what was later called Canada<sup>44</sup> (Burney, 1995). In 1858, Chinese gold prospectors from San Francisco founded Barkerville, located in the north of what was to be the province of British Columbia. Hundreds of Chinese gold miners rushed to the BC interior and a large segment of Barkerville was a Chinese quarter<sup>45</sup>. Later, a Chinatown emerged in Victoria, the capital of British Columbia, and Chinese were variously employed in coal mining and as domestic servants. BC joined the Canadian Confederation in 1871 and was promised a railway link to central Canada. Between 1881 and 1885, over 15,000 Chinese labourers, most from Taishan and the nearby Siyi region, were recruited to tackle the difficult and dangerous task of building the Canadian Pacific Railway (CPR), thereby achieving the Canadian dream of a nation "From Sea to Sea"<sup>46</sup>. For instance, Yip Sang, a successful Chinese immigrant who became one of the most influential merchants and community leaders in Vancouver's early Chinatown, worked as a superintendent for the CPR and hired thousands of contract labourers from China to work on the railway's line construction in British Columbia<sup>47</sup>.

But as soon as the railway was completed in 1885, the message was clear -- Chinese were no longer welcome in Canada. On July 20<sup>th</sup>, 1885, the Canadian Parliament passed *The Chinese Immigration Act* legislating that every Chinese, upon entering Canada, must register and pay \$50 to the Consolidated Revenue Fund of Canada<sup>48</sup>. This was the beginning of the so-called head tax, a notorious discriminatory legislation only targeted against Chinese in

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<sup>44</sup> Canadian Confederation, the birth of Canada as a nation, took place on July 1, 1867, and originally included the provinces of Nova Scotia, New Brunswick, Ontario, and Quebec. British Columbia joined the federation in July 1871.

<sup>45</sup> <http://www.thecanadianencyclopedia.com/index.cfm?PgNm=TCE&Params=A1ARTA0001588>. Accessed April 30, 2006.

<sup>46</sup> Source: "A Brief History of CPR" at CPR Archives: <http://www.cprheritage.com/history/display1.htm>. Accessed on Jan. 12<sup>th</sup>, 2006.

<sup>47</sup> Source: Website of "A Chinese Canadian Story: the Yip Sang Family," the biography of Yip Sang at <http://collections.ic.gc.ca/yipsang/biograph/index.html> (Accessed on April 25, 2006).

<sup>48</sup> Under the *Chinese Immigration Act*, diplomats, tourists, merchants, scientists and students were exempted.

Canadian history. The head tax was raised to \$100 in 1900 and \$500 three years later. On June 30<sup>th</sup>, 1923, the Canadian government passed another *Chinese Immigration Act* prohibiting any Chinese entry into Canada, save for a few minor exceptions. The majority of Chinese immigrants lived as bachelors as their family members were blocked from Canada by the exclusion law. This exclusion law was repealed only in 1947. Between 1923 and 1947 about 120 Chinese entered Canada legally, one of whom was Adrienne Clarkson, who would become the first Governor-General of Chinese origin in the early part of the 21<sup>st</sup> century. According to the General Registers of Chinese Immigration, 97,114 Chinese entered Canada between 1885 and 1949<sup>49</sup>. After 1947, Chinese were legally allowed to join the migration flow to Canada, although admission was greatly restricted until the regulations were changed in 1962 and 1967, finally removing all forms of exclusion on the basis of race. Between 1968 and 1994, 115,167 Chinese from the mainland were admitted entry into Canada. During this same period, 355,200 immigrants came from Hong Kong, and 51,694 from Taiwan (Li, 1998:99). The Chinese Canadian population has dramatically increased since. According to Statistics Canada, 1,029,000 Canadians identified themselves as Chinese in the 2001 Census, accounting for 26% of the visible minority population<sup>50</sup>.

Apart from the United States and Canada, Australia has also been a major destination for Taishanese out-migrants. The story of the Chinese in Australia is very similar to that of the Chinese in North America. In 1851, Taishanese Lei Yamei (Louis Ahmouy) went from Malaya to Australia as a coolie and then worked as a gold miner. He sent letters back to Taishan describing the gold finds in the new world, inspiring hundreds of people from the

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<sup>49</sup> Source: web site of Library and Archives Canada <http://www.collectionscanada.ca/genealogie/022-905.002.01-e.html>. Accessed on Jan. 12<sup>th</sup>, 2006.

<sup>50</sup> See web site of Statistics Canada at <http://www.statcan.ca/Daily/English/050322/d050322b.htm>. Accessed on Jan. 10<sup>th</sup>, 2006.

Siyi area to migrate to Australia. He eventually became a successful merchant importing tea from China to Australia, set up the Siyi Benevolent Association in Australia, co-wrote a report protesting government maltreatment of Chinese in 1878, and later became an owner of the Australia Commerce Bank (Taishan Overseas Chinese Affairs Office, 1992:262-263). The gold finds in Victoria and New South Wales resulted in a large influx of Chinese diggers into Australia in the mid and late 1850s. During the height of the gold rush, the number of Chinese in Victoria rose from 2,341 in 1854 to 25,424 in 1857, and then fell to 17,795 in 1871 (Choi, 1975:19, 20, & 22). It is estimated that about 45,000 to 50,000 Chinese lived in the six colonies in Australia during the gold rush period (Choi, 1975:42).

After the 1850s, agitation and discontent with Chinese immigrants gradually increased in Australia, and restrictive and exclusionary laws, similar to those in the US and Canada, were passed (Yong, 1977:11-17). In June 1855, the first anti-Chinese legislation was passed in the Colony of Victoria. Under this act, a ten-pound poll tax on Chinese immigrants was imposed on every Chinese arrival. This was the typical attitude of all six colonies, and similar restrictive legislation was intermittently introduced in other colonies in the following four decades. The last ten years of the nineteenth century saw an extension of anti-Chinese legislation to all Asiatic and coloured races. In 1901, shortly after the Australian Commonwealth was established, for which anti-Chinese measures were crucial to creating a white Australia, the Australian Parliament passed *the Commonwealth Immigration Restriction Act*, under which all Asians including Chinese, Pacific Islanders and other non-Europeans were largely excluded. It was not until 1958 that this act was repealed.

It is difficult to know the exact number of Taishanese out-migrants over time. It is generally accepted that the Taishanese dominated the population of Chinese immigrants in

North America before the 1950s. In 1876, the first Qing minister to visit San Francisco recorded that 70,000 or about 46% out of 155, 000 Chinese in the US were members of the Ningyang Benevolent Association (Chen, 1877:59-60; Hsu, 2000a:31), whose members were all Taishanese (Lai, 1987:15)<sup>51</sup>. During the gold rushes of the 1860s and 1870s and the construction of the CPR between 1881 and 1885, hundreds of Chinese moved from the US, especially from California, to British Columbia in Canada, or from their homeland in Guangdong province to Victoria and Vancouver via Hong Kong.

According to the Chinese Canadian Head Tax Registers, 62 Chinese male immigrants landed at Vancouver by the steamship "Abyssinia" on Sept. 28<sup>th</sup>, 1889, 58 of whom came from Taishan (San Ning). On August 11<sup>th</sup>, 1890, 101 Chinese arrived in Victoria from Hong Kong by the steamship "City of Peking," most of whom were from Taishan and its three neighbouring counties. On Sept. 24<sup>th</sup>, 1890, 31 Taishanese of 44 Chinese departed from San Francisco to Victoria, BC by the steamship "Queen." Statistics from the General Registers of Chinese immigrants who registered for the Head Tax from Sept. 1<sup>st</sup>, 1885 to June, 1891 show that among the 8,220 Chinese immigrants whose birthplace can be identified, 4,037 or 49% originated from Taishan<sup>52</sup>.

In 1898, an immigrant returned from Mexico to Taishan and recruited about 2000 people to build railways in southern Mexico (Liu, 1994:14). Taishanese also occupied a considerable proportion of Chinese in Australia. According to records of the South Melbourne Chinese Joss House, operated by the Siyi Society, 5,452 Taishanese or 57% of

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<sup>51</sup> According to Lai (Lai, 1987), the Ningyang Benevolent Association (*Ningyang huiguan*) separated from the Four District Association (*Siyi huiguan*) in the US in 1853, to serve its Taishanese members exclusively.

<sup>52</sup> Before 1914 Taishan's original name was Xinning so that, according to the pronunciation of Cantonese, in the General Registers of Chinese Immigration Xinning was romanized and written as Sin Ning, Sin Ming, Sing Ning, San Ning, Sun Ning, San Ling, Sin Ling, San Hing, Sun Hing, Sining, Saning, Suning, etc.

9,567 persons from the Siyi area registered in the society and finally died in Australia (Choi, 1975:79).

In 1900, about 160,000 Taishanese resided abroad, with 120,000 living in the Americas (Editing Committee of Taishan Gazette, 1993:135). Research shows that nearly 64% of Chinese immigrants to Canada before WWII came from Siyi, and 96% from the Pearl River Delta (including the Siyi area, Zhongshan, Heshan, Shunde, Nanhai, Panyu, Zengcheng, Dongguan, and Bao'an)<sup>53</sup>. By 1948, the number of overseas Taishanese increased to 93,413 (Editing Committee of Taishan Gazette, 1993:136). The first national population survey of the new People's Republic of China in 1953 indicated that 159,074 persons abroad originated from Taishan (Editing Committee of Taishan Gazette, 1993:136). In 1984, the Office of Overseas Chinese of Taishan County estimated the population of Taishanese abroad was nearly 750,000 and that of Taishanese in Hong Kong and Macao had reached 350,000 (Editing Committee of Taishan Gazette, 1993:136). Scholars estimate that about 50% of Chinese Americans, 45% of Chinese Canadians and 37,844 Chinese Australians are of Taishanese descent (Mei and Zhang, 2001:76, 79). According to the recent figures released by the Taishan Government, more than 1.3 million people originated from Taishan are currently residing in 92 countries and areas in the world, in comparison with the figure of 1.01 million locals within the Taishan Municipality<sup>54</sup>. Thus, local Taishanese officials often inform outsiders and visitors with great pride that there are two "Taishans" existing demographically in the world – one in China and one outside of China. Taishan is

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<sup>53</sup> Electronic source: web site of "*Across the Generations A History of the Chinese in Canada*" of Sumner Group at <http://collections.ic.gc.ca/generations/index2.html>. Accessed on December 7, 2005.

<sup>54</sup> Electronic source: Homepage of the Government of Taishan Municipality (Taishan Zhengfu menhu gongzhong wang) at <http://www.tsinfo.com.cn/Disp.aspx?ID=1753&ClassID=65>. Accessed on December 9, 2005.

undoubtedly renowned as the premier *qiaoxiang* in China (Taishan CCP Head Office *et al.*, 2002:Preface).

Duanfen is one of the sending points of emigrants from Taishan. As mentioned previously in this chapter, Duanfen is the native place of the first Taishanese, Mei Yaoxuan, who went abroad more than two hundred years ago. After Mei Yaoxuan and Cao Yazhi, many people from Duanfen followed them. Mei Dongxing, from Duanfen, went to New South Wales of Australia in 1852, and was probably one of the pioneering immigrants from Siyi in Australasia (Mei, 2000:77). In the 1850s or 1860s, a Mei person from Duanfen arrived in California and in 1876 he went to Chicago (Mei, 2000:75). His brothers soon followed him, where they started a grocery business. In 1885, more than 40 immigrants from Duanfen lived in Chicago and by the 1920s the Mei population in Chicago alone increased to 800 (Mei, 2000:75). According to *The General Registers of Chinese Immigration*, the earliest Duanfen immigrant to Canada was Mui Chik, who arrived in Victoria as a labourer in May 1882. During the high point of immigration in the late 1880s and early 1890s, many Duanfen natives moved to Canada. For example, six Duanfen immigrants arrived in Victoria, British Columbia from Hong Kong by the steamship the “Empress of Japan” on November 3<sup>rd</sup>, 1891, and paid \$50 CAD head-tax.

Probably the most famous overseas figure from Duanfen was Quong Tart or Mei Guangda (1850-1903). He was born into a poor family in Longtengli (Longteng Alley) near Shandi market in Duanfen. He was brought to Australia by an uncle in 1859 as a nine-year-old boy and was subsequently “adopted” by a white-Christian family. He learned to speak English with a broad Scottish accent and fell in love with the poetry of Robert Burns<sup>55</sup>. After working as a storekeeper and gold mine owner, he accumulated enough wealth to establish a

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<sup>55</sup> Robert Burns, 1759-1796, was a famous Scottish poet and a lyricist.



tea trading business, and opened a chain of tearooms in Sydney. He also took a Scottish bride. Gradually he became a leading merchant and trader with China, and also a local community leader and philanthropist with established connections with political and social elites, which was most unusual in late Victorian Australia. He protected many Chinese in the anti-Chinese, white-dominated Australian society, wrote a report for the New South Wales government on "the Chinese issue," and was widely regarded as the *de facto* consul of the Qing Dynasty in Sydney, and was recognized by the Qing government (Travers, 1981)<sup>56</sup>.

It is asserted that any Taishanese in the world whose family name is Mei (*Moy* or *Moi* in Cantonese), originated from Duanfen (Zhang, 2005c:156). In the early 1990s, it was reported that the Duanfen population was 75,000 worldwide (Mei, 1991:3). By 2005, the figure had jumped to 110,000 (Duanfen Township Government, 2005:97). It is reported that overseas Duanfen natives and their descendents are distributed throughout 50 countries and areas. In the USA alone, there were more than 50,000 who originated from Duanfen in the mid-1990s (Mei, 1996:70).

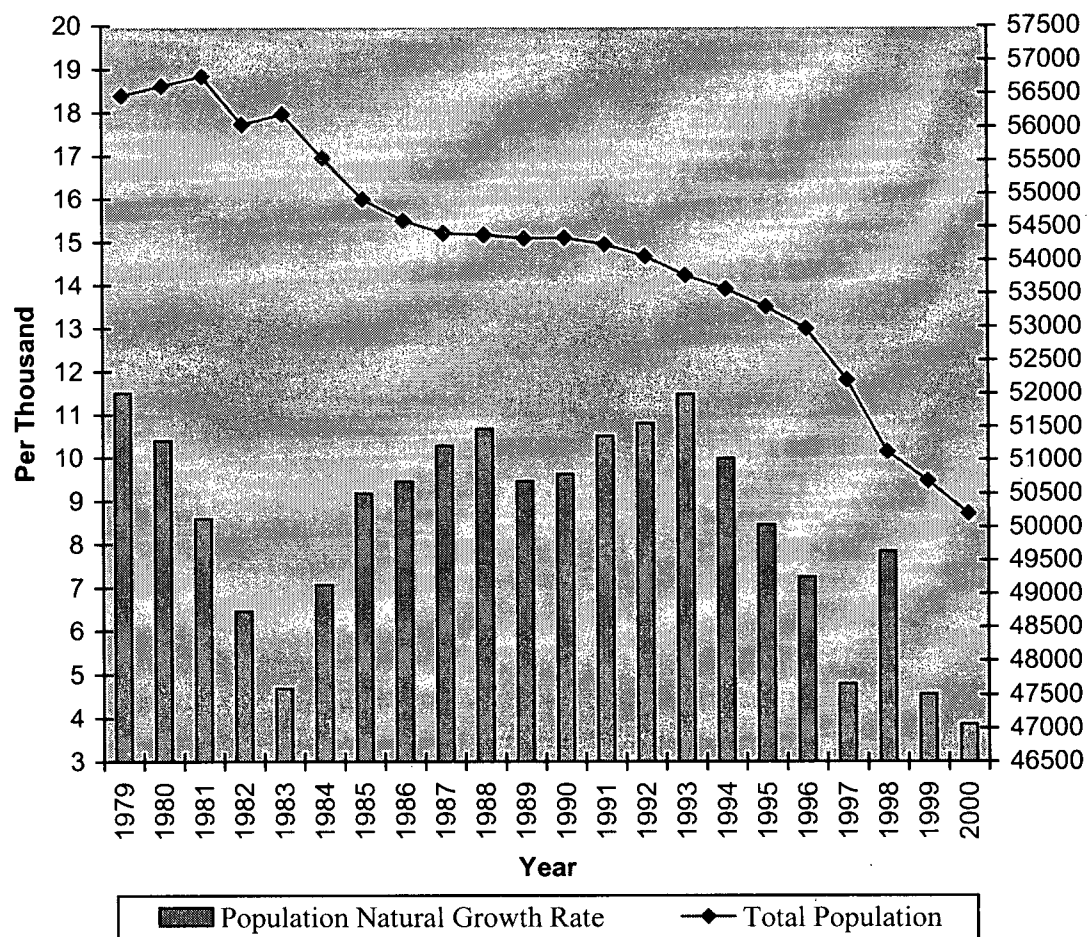
An examination of the Duanfen population trend from 1979 to 2000 will illustrate the demographic drainage of emigration from the local area. The total population in Duanfen has been steadily decreasing since 1981. However, during the same period the population's natural growth rate has remained higher than 3.86%, though varied from year to year (See Table 4.1). How can we explain the decreasing population size despite positive natural growth rates? The answer lies in the outflows of migration. Ever since 1978, when China reopened its doors to emigration, hundreds of local Taishanese have succeeded in applying for immigration visas to the USA, Canada, Australia, and Hong Kong. According to official

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<sup>56</sup> More bibliographical information and images of Mei Guangda can be found on the website of Chinese-Australian Historical Images in Australia at <http://www.chia.chinesemuseum.com.au/biogs/CH00021b.htm>.

records, Duanfen has lost about 40, 000 persons through emigration from 1978 to 2000 (Duanfen Township Government, 2005:229). Thus, the drainage of population by emigration has counteracted the natural population growth.

Figure 4.1 Population and Its Natural Growth Rate of Duanfen, 1979-2000



Source: Edited from *Duanfen Gazette* (Duanfen Township Government, 2005:38-39)

The drainage of emigration from Taishan is also evident. In the late 1970s, the Chinese Government allowed *qiaojuan*, the dependents of *huaqiao* and *tongbao*, to join their family members and relatives outside of China by means of emigration, triggering a new

migration wave. According to statistics, between 1978 and 1998, 25,268 families and 168,067 individuals, or about 16.3 percent of Taishan's total population have gone overseas (Mei, 2005:67). The average emigration population per year was about 84,000 persons. In Taishan, business related to emigration is quite prosperous. Offices, banners, and advertisements for emigration agents offering to help emigrants prepare documents and apply for passports and visas are visible on every major street. English and cooking classes for emigrants are also popular.

### **Reasons and Mechanisms of Taishanese Emigration**

Why does Taishan have such a long emigration history and an enormous emigrant population? Scholars have suggested that frequent natural disasters, an increasing population with limited arable land, and socio-political turmoil were the common internal reasons pushing Taishanese abroad in search of survival in the early period (Chan, 1983:25-36; Hsu, 2000a:18-29; Mei, 1979:466; Wickberg *et al.*, 1982:9).

Taishan is located on the southwestern edge of the Pearl River delta with the South China Sea to its south, and various rivers and mountains scattered within its boundaries. It is influenced by typical sub-tropical weather that frequently brings natural catastrophes such as floods, typhoons, tropical storms, and drought. In July 1833, a typhoon hit Taishan and caused tremendous floods, in which 6,000 houses were ruined (Editing Committee of Taishan Gazette, 1993:114). In the 57 years from 1851 to 1908, there were ten floods, seven typhoons, five earthquakes, four droughts, five famines, and four epidemics in Taishan (Taishan Overseas Chinese Affairs Office, 1992:39). In April 1892, flooding caused by a rainstorm inundated 17 villages and large areas of crops. On July 18<sup>th</sup>, 1946, a mountain

torrent after a typhoon destroyed 103 houses and 37 boats, injured 10 persons and resulted in a death toll of 26 in several villages (Editing Committee of Taishan Gazette, 1993:114).

According to the *Taishan Gazette*, there were 16,357 taxpayers in Taishan in 1572, with the number slightly increasing to 17,190 in 1746<sup>57</sup>. The number of households in Taishan was 2995 in 1667 and only increased by 67 over nearly eight decades (Editing Committee of Taishan Gazette, 1993:127 & 128). All these figures imply that there was a stagnation in population growth during the early Qing dynasty. Since the late eighteenth century, Taishan has seen a rapid population increase. In 1838, the number of taxpayers tripled to approximately 56,000. It rose to 120,467 in 1911 when the Republic of China was established, an increase of 215 percent in 34 years. In 1932, the total population of Taishan hit a record of 984,491 (Editing Committee of Taishan Gazette, 1993:128). Besides the natural population growth, the influx of migrants from other places to Taishan played a crucial role after the thirteenth century. In 1263, during the Southern Song, 13 clans moved to Taishan from Nanxiong, northern Guangdong. During the course of the Qianlong (1736-1795) and Jiaqing (1796-1820) reigns of the Qing dynasty, about 30,000 Hakka settled in Taishan from other prefectures of eastern Guangdong (Editing Committee of Taishan Gazette, 1993:129). Moreover, according to Hsu's research (Hsu, 2000a:21), Taishan is poorly endowed with natural resources, as 56% of the region's surface is covered by hills and mountains; only about 35% of the land is cultivable. Wakeman (Wakeman, 1966:179) finds that the average cultivable land per person in Guangdong in 1812 was only 1.67 *mu*, or one-quarter acre. Land was concentrated in the hands of the few, which resulted in large peasant populations living on land-renting, debts, or bankruptcy in a subsistence level (Wickberg *et*

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<sup>57</sup> According to the gazette, a tax-payer only refers to a male adult who had to pay various taxes and serve in the military. It is hard to know the exact figures of the local population due to lack of historical records.

*al.*, 1982:9). In a region like Taishan, which is endowed with poor natural conditions and frequently affected by natural disasters, the contradiction between land and population made the livelihood of peasants increasingly difficult.

Taishan had also been set back by frequent social turmoil. The influx of Hakka, an ethnic group with a different dialect and set of customs from the Cantonese-speaking Taishanese, resulted in a thirteen-year-long war (1856-1867) between the *Bendi* (natives) and the Hakka (in-migrants; Hakka meaning "Guest Families") for control of land, political power and other resources. During the war<sup>58</sup>, about 200,000 persons perished (Leong, 1997:74); Duanfen was also deeply affected by the war (Duanfen Township Government, 2005:100). During an attack by the Hakka in Guanghai (south Taishan), 4,000 villagers were killed on the fourth day of the Chinese New Year 1863 (Liu, 1994:5). Those Hakka captured by the *Bendi* were either killed or sold as coolies to Peru and Cuba (Taishan Overseas Chinese Affairs Office, 1992:40). Just two years before the break of the *Bendi*-Hakka war, Taishan was threatened by the Triads, or Red Turban bandit invasion<sup>59</sup>. By entering Taishan from the neighbouring Kaiping County, the Triad militia attacked the Taishan capital. After three fights in two months, the Triads were finally defeated and retreated from Taishan (Editing Committee of Taishan Gazette, 1993:223). Apart from these bloody conflicts, local people were constantly harassed and bullied by small-scale bandits and robbers. From 1911 to 1916, there were 73 bandit attacks within Guanghai, leaving 3,214 families victims of robbery, 734 person killed or injured, 1,114 houses set on fire, and 25 watch-towers ruined (Liu, 1994:6). In August 1917, 105 bandits raided a school in Duanfen (Mei, 1991:143). The

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<sup>58</sup> The Bendi-Hakka war ended up in 1867 with the split of Taishan and Chixi at the east coast of Taishan was separated from it. Hakka were concentrated within Chixi.

<sup>59</sup> The Triads, or Three Unities Society, later known as the Red Turban, aimed to topple the Qing and return the Ming to power, was set up in Guangdong in 1838, and then recruited members in the Pearl River delta. After raging through the province, the uprising of Triads was beaten down by the Qing magistrates in 1855.

presence of watch-towers (military buildings) all over the Siyi area is good evidence of the widespread severity of these attacks and the desperation of the villagers who were forced to take self-protective action (Zhang, 2002).

Therefore, Taishan experienced constant duress from frequent natural catastrophes, ethnic conflict, military rebellions and banditry. Every disaster, whether natural or man-made, followed stories of casualties, broken families, loss of property, refugees, and departures overseas in search of a better life. Yet, there was also a crucial external factor, the spread of capitalism and colonialism in the world, which made Taishanese immigration possible.

Taishan is close to three international ports in the Pearl River delta. It is 130 kilometers southwest of Guangzhou, 119 kilometers west of Macao and 170 kilometers west of Hong Kong, making it easy for Taishanese to travel to these three locations. Before the First Opium War (1839-1842), China was by and large closed to the outside world. After the Nanking Treaty (1842), the Qing government had to open up five coastal cities, including Guangzhou, as ports to the West, and Hong Kong Island were ceded to Great Britain in perpetuity. Under this treaty, the "coolie trade" (contracted, kidnapped, or abducted labourers) and the forced migration of Chinese to the West was legalized in China. With the Second Opium War (1856) and the following Tianjin Treaty (1858), Western privileges and power in China were legally strengthened. Coolie agents and brokers were permitted to establish recruitment spots in Hong Kong, Macao and Guangzhou. Thus the penetration of the colonial forces in coastal China, especially in the Pearl River delta, provided the colonialists and their compradors opportunities to contract, lure, and abduct Chinese peasants by whatever means to work abroad.

As previously discussed, since the mid-nineteenth century, the gold rush in western North America had attracted mass Chinese migration. In 1848, gold was discovered in John Sutter's Mill along the Sacramento River in California. This attracted many adventurers who dreamt of becoming rich overnight to rush to this region. But they would need labour which would endure bitter working conditions and low wages. These fortune-seekers turned to their eyes to Chinese. News spread to South China, and America was illustrated as a "Gold Mountain" where gold could be easily found everywhere and people could become rich in short time. Hundreds of Chinese determined to achieve the "gold dream" were recruited or lured to California. Between 1848 and 1852, up to 25,000 gold miners from the Pearl River delta were working in the gold fields (Mark and Chih, 1982:5-6). At the end of the gold rush fever in 1860s, Chinese immigrants switched their occupations to other areas such as railway builders, laundry workers, cigar manufacturers, grocers, fishermen and the like. At the same time, they moved to British Columbia in the north for new findings and settled in the interior area of the Fraser valley. During the construction of the Canadian Pacific Railway, hundreds of Chinese immigrants were recruited for this project. The gold rush in Australia also attracted a large number of Chinese immigrants.

As a consequence of improved means of transportation and communication, the Pacific Rim and the Pearl River delta, including Taishan, was more closely linked with the New World. During the early period, Chinese immigrants took sailing ships to their places of destination. Since the late 1840s, there were regular steamships traveling between Hong Kong and San Francisco, and later Hong Kong-Victoria and Vancouver, and Hong Kong-Sydney, Australia, which made mass migration possible. These steam lines also made mail services, trade, and monetary transfers in terms of remittances efficient. Taishanese

immigrants could travel safely to the “Gold Mountains” and “remain in touch with life in Taishan through letters, remittances, return visits, migration chains, the consumption of Chinese groceries, books, magazines, and participation in local charitable projects and war relief drives” (Hsu, 2000a:17). From a global perspective, Taishan became entwined with the global capitalist system through emigration and perpetuated its status quo through the consequential activities of Taishanese migrants.

Most of the early Chinese immigrants went abroad by two channels: contract/coolie and chain migration (Wickberg *et al.*, 1982:5). As mentioned in preceding part, coolie brokers and compradors were allowed in coastal China after the first Opium War. Male peasants, who were lured by the “gold dream,” enslaved in ethnic or clan battles, or whose families were forced to pay off debts because of gambling or opium addiction, were contracted as labourers and transported to the New Worlds. In this process, immigrants were obligated to sign an indenture with the brokers, in which they agreed to work off their indebtedness to the brokers who had paid for their passage from China and arranged a job for them in their new location before they were free to seek out opportunities on their own. For instance, from 1847 to 1862 about 6,000 Chinese coolies per year were shipped to Cuba on American vessels (Tsai, 1986). A Chinese immigrant, Yip Sang, was responsible for hiring and transporting thousands of males from China to work on the CPR construction line in British Columbia<sup>60</sup>. During the long journey, the immigrants were squeezed into steerage and endured unpleasant living conditions. Many of them became sick and died on the way to the “gold mountains.”

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<sup>60</sup> Web page of “A Chinese Canadian History: The Yip Sang Family” produced by the Vancouver Museum at <http://collections.ic.gc.ca/yipsang/biograph/index.html>. Accessed on Feb. 14, 2006.



In a few instances in the nineteenth century, but more commonly in the twentieth century, Chinese migrated through chain networks – migration through family, kinship, friendship, and ethnic ties (Graves and Graves, 1974b). In practice it takes place in several ways: husband-wife reunification, parent-children reunification, sibling following, home village or community linkage. As the early Chinese immigrants were male labourers, the population of Chinese immigrants was dominated by males. According to the General Registers of Chinese Immigration in the period of Sept. 1<sup>st</sup>, 1885 to June 1891, 97.4% of 9,761 Chinese immigrants in Canada were males; the sex ratio was 377:1. In these bachelor communities, a Chinese adult male had to save money in any way possible, hoping to return to his home village once he had accumulated enough savings. There, he would marry a local woman if he was single, and if already married, would probably find a second wife or more. Then he would build a big house and buy a patch of agricultural land. Upon his return to the “gold mountain,” he would arrange to bring back with him his wife/wives and a teen-aged son or nephew. If he could not return to home village, he would send remittances to his family members and sponsor them to join him. Through consequent return trips and such snow-balling chain migration, a Chinese immigrant works to bring family members, relatives, lineage members, or even those without any blood or marriage relationship by whatever means (legal or illegal) to the country of settlement. The stories of “paper son” migration exemplify such extreme efforts under the exclusion act in the US (Chin, 2000; Hsu, 1997). However, not all Chinese migrants could achieve this goal of establishing a new family and life in a new home with all his family members and relatives. It was only after the exclusion laws were repealed that the dream of family reunification could be realized.

## China's Policies on Chinese Transmigrants since 1978

After the People's Republic of China was founded in 1949, the Chinese Communist Party (CCP) government inherited the Kuomintang (KMT) government's overseas Chinese policy<sup>61</sup>, which tried to win the recognition of overseas Chinese to the new sovereignty and to absorb overseas remittances and donations by providing them with some privileges. During the Land Reform (1953-1956), *huaqiao* who had a large number of properties in the homeland, also labeled as "landlords," had their big houses confiscated by the local government, and their dependents at home were forced to surrender their remittances to the collective (Peterson, 1986:106-110). In some places, local authorities put pressure on *qiaojuan* who were dependents of remittances to contact their overseas relatives and demand more remittances. Upon the arrival of the remittances, they had to hand them to the collective (Zhuang, 2001:271). During the Communization Movement (1958-1963), Communist government appropriation of overseas remittances continued (Yang, 2002:91), and *qiaojuan* who lived on remittances were asked to join the collective and engage in physical production (Editing Committee of Guangdong Gazette, 1996:218-219). Empty *huaqiao* houses and large ancestral halls were either used as collective headquarters, warehouses, workshops, or torn down (Johnson, 1998:320). Lineage properties, not least ancestral halls, were confiscated, and ancestral tablets were destroyed. These were critical issues in Taishan and the entire Siyi where large lineages had been established and maintained by transnational remittances. Hence, during the seventeen years from 1949 to 1965, the communist government generally mistreated those who had transnational connections and created difficulties in control over transnationals' properties in China. There was one issue, however, that remained at the center

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<sup>61</sup> For details of KMT's policy on overseas Chinese, please refer to Ren and Zhao's book (Ren and Zhao, 1999a).

of the overseas Chinese policy – the necessity to attract hard currency for national reserves (Chong, 1988:127-134; Fitzgerald, 1972:124). Thus, whatever China's overseas Chinese policy had been, in general, it essentially focused on obtaining monetary transfers from the purses of Chinese transnationals and their relatives at home, though not always with success, since the ideological impulses of domestic transformation ran counter to local practices.

The most difficult period was after 1966, when the Cultural Revolution (1966-1976) created chaos and spread a leftist anti-foreign ideology throughout China, which was especially virulent in the various *qiaoxiang*. The Chinese government repudiated the previous policy which had been in practice and took a hostile stance towards *huaqiao*, *tongbao*, *guiqiao*, *qiaojuan*, and those who had any overseas connections. These people were considered ideologically suspect, undesirable, and reactionary because of their "bourgeois background" and foreign (mostly pro-American) connections, which were stigmatized at the time. The privileges and rights previously given to them were repudiated and removed. Thus, the *guiqiao* and *qiaojuan* were purged, criticized, and physically abused. Their properties and those of the *huaqiao* and *tongbao* were confiscated either for official use or distribution among the "poor." Overseas visits, remittances, and donations were blocked (Chong, 1988:134; Fitzgerald, 1972:162-184; Zheng, 1996). After the fall of the "Gang of Four" in 1976 and Deng Xiaoping's re-emergence in China's political arena, the leftist ideology gradually faded away, and economic and administrative reform became China's major priority. The urgent issue was where to obtain the capital, technology, and management skills necessary for China's economic development. Once again, the Chinese government thought of Chinese living abroad and turned its attention to the possibilities of obtaining capital and other resources from these outside sources. Thus, China's policy on overseas Chinese made a

sharp turn from revolutionary appeals and policies which had discriminated against overseas Chinese and victimized their dependents, to patriotic appeals which encouraged Chinese abroad to contribute to China's modernization. Chinese transnationals, in the eyes of the Chinese government, shifted from "class enemies" to "patriots" (Nyiri, 2002). If it meant that they could profit from this patriotism, as China would benefit from this renewed economic activity, so be it.

The government urgently needed to win back the confidence and loyalty of Chinese transnationals. They needed to abandon the past discriminatory and leftist policies against overseas Chinese, admit their wrongdoings of the 1950s and the Cultural Revolution, and redress and compensate the grievances and suffering they caused, if necessary. By doing these things, the Chinese government could claim to protect the rights of overseas Chinese, their dependents and properties in China. Various measures were taken at different administrative levels to rectify the past wrongs. In Taishan, the first step was to remove the "bad" class labels from those who were categorized as landlords or rich peasants at the time of the land reform. By the early 1990s, such class labels from of total 5,097 households who had overseas connections had been eliminated (Taishan Overseas Chinese Affairs Office, 1992:203). The second step was to resolve legal injustices. 550 persons and 1690 cases involving false and unjust charges against *huaqiao*, *tongbao*, *guiqiao* and *qiaojuan* during the land reform and the Cultural Revolution were redressed (Taishan Overseas Chinese Affairs Office, 1992:205). Finally, the local government returned the confiscated houses of *huaqiao*, *tongbao*, *guiqiao* and *qiaojuan* to their original owners (overseas Chinese houses, or *qiaofang*). This was a painful and complicated process since many of the confiscated properties had been occupied for official use, allocated to local cadres and to so-called "poor

peasants,” or even sold for commercial purposes. The local government had to evacuate and renovate the *qiaofang* (Overseas Chinese houses) before they were handed back to the original owners. By 1991, the project of *qiaofang* restitution was finished and 3,646 cases from land reform, 1290 cases from the Great Leap Forward, and 6214 rooms confiscated during the Cultural Revolution were settled. The total cost to the government was 22.193 million *yuan* (Taishan Overseas Chinese Affairs Office, 1992:204). Similar measures had also been taken nationwide. It was reported that by 1989, 64,500 unjust charges against *huaqiao*, *tongbao*, *guiqiao*, and *qiaojuan* had been redressed, 25,99 million square meters of confiscated *qiaofang* had been returned to their rightful owners, and more than 10,000 intellectuals of *guiqiao* and *qiaojuan* had been appointed to official positions (Ren and Zhao, 1999a:288-289).

Another aspect of the shift in China’s overseas Chinese policy was the resurrection and establishment of the official organs for dealing with Chinese transnational issues<sup>62</sup>. The former Overseas Chinese Affairs Office (*Qiaowu weiyuanhui*) returned in 1978 as the Overseas Chinese Affairs Office (OCAC - *Qiaowu bangongshi* or *Qiaoban* for short) under the State Council. The OCAC is the governmental body responsible for the administration of overseas Chinese affairs. The former All-China Returned Overseas Federation (ACROF - *Quanguo guiqiao lianhehui*), a mass organization of overseas Chinese returnees (*Quiguo huaqiao*), was restored at the end of the same year. In 1983, the National People’s Congress (NPC) set up the Overseas Chinese Committee (OCC - *Huaqiao weiyuanhui*) which assumed responsibilities for legislation and monitoring the work of the government in overseas Chinese issues. A similar committee was also established under the Chinese People’s

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<sup>62</sup> For information about China’s administration of overseas Chinese affairs from 1949 to 1977, please refer to Stephen Fitzgerald’s work (Fitzgerald, 1972).

Political Consultative Conference (CPPCC, *Zhengzhi xieshang huiyi*), which gives priority to providing advice. The China Overseas Exchange Association (COEA, *Haiwai jiaoliu xiehui*) was developed in 1990, engaging in liaising with overseas Chinese communities and organizations. Gradually, various governmental and non-governmental organs have been re-established or set up at provincial, municipal, prefecture, county, and township levels in areas where there are overseas Chinese connections (Cheng and Ngok, 1999:116-118).

In Taishan, the ACROF of Taishan was revived in November 1979 (Taishan Overseas Chinese Affairs Office, 1992:196). In March 1980, the OCAC of Taishan was established (Taishan Overseas Chinese Affairs Office, 1992:191). Later, the Overseas Chinese Committee of Taishan People's Congress and that of Taishan Political Consultative Conference were also set up (Taishan Overseas Chinese Affairs Office, 1992:200-201). The main task of these bodies in charge of overseas Chinese has been to attract overseas Chinese contributions to China. Governmental officials and leaders of non-governmental organizations at various levels frequently go abroad to visit overseas Chinese communities and organizations and invite them to come back to their *Qiaoxiang* (Cheng and Ngok, 1999). More than 300 officials from Taishan made visits overseas from 1984 to 1990, and the number of overseas Taishanese visits to Taishan increased from 20,000 in 1979 to more than 100,000 per year in the 1990s. During the same period, 437 overseas Taishanese organizations sent delegations to visit Taishan (Taishan Overseas Chinese Affairs Office, 1992:221).

After redressing the repressive and discriminatory policy of the past and reviving the governmental and non-governmental bodies in the end of the 1970s and the early 1980s, the Chinese government began to focus its overseas Chinese policy on attracting Chinese

transnationals to participate in China's economic production and construction (Zhuang, 2000:5). A series of laws and regulations at various levels of government have been implemented during the last three decades to encourage them to send remittances, donate and invest in China.

For both the *qiaojuan* who used to depend on overseas remittances in the past and the Chinese government, remittances became easy to obtain once the institutional barriers were lifted. Since the mid-1970s, in order to attract overseas remittances the government has restored privileges to the overseas returnees (*guiqiao*) and to those whose have overseas relatives and depend upon receiving foreign remittances. Privileges included the reopening of *Youyi shangdian* (friendship shops) which provided difficult-to-obtain commodities, allowing the purchase of these commodities with remittances receipts, and permitting visiting overseas Chinese to bring clothing, food, alcohol, cigarettes, watches, bikes and one electronic appliance (such as a television set, camera, fridge, or washing machine) into the mainland without customs duties (Editor of China Yearbook, 1984:480). In 1981, a new ordinance on foreign currency issued by the State Council permitted Chinese citizens to save their overseas remittances and exchange them at the local branch of Bank of China (Bolt, 2000; Dept. of Regulations and Laws, 1993:208-210). In 1984, the Bank of China allowed Chinese citizens to open joint banking accounts with their overseas relatives and save foreign currencies (Editor of China Yearbook, 1985:281). In the following year, the Bank of China issued another regulation allowing those who had received remittances from abroad to save the remittances in five major foreign currencies that could be directly exchanged in the bank and withdrawn in such currencies after a fixed term of saving. Moreover, all overseas remittances are now free of income tax. At the same time, Chinese citizens who are going

abroad are permitted to bring their savings of foreign currencies out of China (Dept. of Regulations and Laws, 1993:212). In July 1993, the State Council issued thirty-one *Measures to Implement the PRC Law on Protecting the Rights and Interests of Guqiao and Qiaojuan*, a comprehensive law on *guqiao* and *qiaojuan*, which was passed by the NPC two years ago. According to the Article 19:

“Overseas remittances are legal incomes of *guqiao* and *qiaojuan*. They are protected by law and free of taxes. Any organization or individual should not seize, deduct, postpone to cash, forcibly borrow, defraud, illegally freeze, or confiscate overseas remittances” (Editor of China Yearbook, 1994:96).

With these rules, people in China have more and more freedom to receive, spend, and save foreign currencies for their own use. At the same time, since foreign currencies must be exchanged at the Bank of China, the official institution administrating the financial market of China, China has accumulated large amounts of foreign currency for its foreign reserves.

As most of the overseas remittances have been made to individuals and have been spent by the individuals, from the perspective of the government, donations from Chinese transnationals are a concrete and visible substance that can be monitored and manipulated by the government. There has been a long history of overseas Chinese donations to support education. As early as 1957, the PRC established its first law regarding donations: *Rules on Overseas Chinese School Donations*, which made clear that overseas Chinese donations to schools were encouraged and allowed schools to be named after/by the overseas Chinese donors<sup>63</sup>. The reform and open-door policies allowed Overseas Chinese to visit their ancestral land and Taishan immediately benefited from overseas Taishanese donations. The

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<sup>63</sup> Information is from the home page of Overseas Chinese Affairs Office of the State Council of the People's Republic of China: <http://www.gqb.gov.cn/node2/node3/node5/node9/node105/userobject7ai1348.html>. Accessed on March 3<sup>rd</sup>, 2006.



first donation came from an American Taishanese who donated RMB¥30,000 *yuan* to a small project, a reservoir electricity generation station, in his home village (Mei, 2006:77). The Taishan government realized that such donations could help Taishan in many ways, and thus it soon established five measures to encourage and attract overseas donations: (1) schools and buildings could be named after the donors, with monuments or plaques put in place to commemorate such donations; (2) donors were given the power to choose the location, scale and operation of the schools their donations funded; (3) the construction of the schools would occur under the close supervision of the local government to ensure that all requirements were met; (4) governments guaranteed donations would not be abused, punishing any violators; and (5) donors would be acknowledged by the local government and provided with honorary titles in the schools (Mei, 2006:77). One year later, the Taishan Government implemented a similar policy to attract overseas donations to hospitals and health care (Mei, 2006:77). Since then, hundreds of titles and awards have been given to those who have made large donations. As one example, an American Taishanese entrepreneur was granted “Guangzhou Honorary Citizenship” and “Taishan Honorary Citizenship” for his large donations to Guangzhou and Taishan (Mai, 2005:135). In a ceremony at the end of 2004, the Government of Duanfen Township awarded those who had donated more than RMB¥1 million *yuan* a with “Contribution Award” (Duanfen Township Government and Editors of *Runan zhi hua*, 2004).

In January 1997, the People’s Congress of Guangdong Province passed *The Guangdong Administrative Rules on Huaqiao Donations to Public Services*. According to these rules, any donation from *huaqiao* to any public sectors, such education, technology, culture, health care, sports, infrastructure, welfare, and agriculture was to be warmly

welcomed and encouraged. The donations were to be protected and used properly according to the donors' will. Also, donation certificates and other acknowledgments were to be given to the donors<sup>64</sup>. Two years later, a similar law, *The Public Sector Donation Law of the People's of Republic of China*<sup>65</sup>, passed by the National People's Congress, spread Guangdong's experiences of dealing with donations of Chinese transnationals to the whole nation. In 2001, the Ministry of Finance, the National Revenue Bureau and the General Customs Bureau jointly promulgated *The Contemporary Measures on Customs Tax Free for Poverty-Alleviating and Benevolent Donations*, and showed to the world again that no customs tax would be collected from donation projects geared towards welfare and the elimination of poverty<sup>66</sup>. In April 2005, the Guangdong Provincial Government issued *The Guangdong Measures of Administrating Donation Projects on Public Services*, emphasizing again that donations from overseas Chinese would be strictly monitored to ensure that there would be no misuse of donation money<sup>67</sup>.

If Chinese transnationals' remittances were to improve individual livelihood and donations helped build and strengthen local public services, welfare and infrastructure, their investments would greatly accelerate China's industrialization and development. One objective of Deng Xiaoping's reform policy was to stimulate China's stagnant industrial development by absorbing foreign capital and attracting foreign investment. China's initial establishment of the Special Economic Zones (SEZs) in the early 1980s was the first major

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<sup>64</sup> Information is from the home page of Guangdong Overseas Chinese Affairs Office: <http://gocn.southcn.com/qzfg/dfxfg/200306140080.htm>. Accessed on March 3<sup>rd</sup>, 2006.

<sup>65</sup> Information is from the home page of Overseas Chinese Affairs Office of the State Council of the People's Republic of China: <http://www.gqb.gov.cn/node2/node3/node5/node9/userobject7ai1270.html>. Accessed on March 3<sup>rd</sup>, 2006.

<sup>66</sup> Information is from the home page of Overseas Chinese Affairs Office of the State Council of the People's Republic of China: <http://www.gqb.gov.cn/node2/node3/node5/node9/node103/userobject7ai1314.html>. Accessed on March 3<sup>rd</sup>, 2006.

<sup>67</sup> Information is from the home page of Guangdong Overseas Chinese Affairs Office: <http://gocn.southcn.com/qzfg/dfxfg/200505170088.htm>. Accessed on March 3<sup>rd</sup>, 2006.

step towards achieving this goal. The four SEZs of Shenzhen, Zhuhai, Shantou, and Xiamen, located in the coastal regions of Guangdong and Fujian provinces, were chosen largely because of their geographic links with *Tongbao* in adjacent Hong Kong, Macao, Taiwan, and *Huaqiao* in Southeast Asia. About 230,000 Hong Kong Chinese have family ties with the residents of Shenzhen. Approximately 70 percent of Taiwan's population has ancestral roots in southern Fujian Province (Chen, 1993:102). In such regions where there is an abundance of cheap land, labour and raw materials, *huaqiao*, *tongbao* and other foreigners were allowed to set up foreign-capital (*waizi*), sino-foreign joint capital (*zhongwai hezi*) and sino-foreign joint management (*zhongwai hezuo jingying*) enterprises which engage in material-imported, design-imported, and accessory-imported manufacturing and compensation trade (*sanlai yibu*).

As early as 1979, China enacted *The Chinese-Foreign Joint Capital and Joint Management Enterprise Law of the People's Republic of China*, which allowed foreigners (including *huaqiao* and *tongbao*) to set up joint business ventures with Chinese partners. In 1986, the NPC passed *The Foreign Enterprise Law of the People's Republic of China*. In this law, China explicitly allowed foreign investment in China and promulgated measures to protect the investors' properties and profits. In 1990, the central government issued "*The State Council Regulation on Encouraging Overseas Chinese, Hong Kong, and Macao Compatriots to Invest in the Mainland*," which provided tax benefits and preferences to Chinese investors from abroad. Similar policies, such as reducing land use fees, offering tax reduction or tax exemptions for a fixed period, and granting investors special titles and rewards, have been implemented in different provinces. In July 1993, the State Council issued *The Thirty-one Measures to Implement the PRC Law on Protecting the Rights and*

*Interests of Guiqiao and Qiaojuan*, which was passed by the NPC two years ago. This law laid the cornerstone in providing assistance to *huaqiao* returning to China permanently, providing them with jobs, allowing *guiqiao* and *qiaojuan* to invest and open enterprises in any part of China, protecting their private properties and their rights to communicate with and visit their relatives abroad, providing them with favorable education for their descendants in China, and so on (The State Council, 1994). As economic contacts from across the Taiwan Strait have increased since the 1990s, the NPC passed *The Taiwan Tongbao Investment and Protection Law of the People's Republic of China* in 1994 and emphasized China's efforts and commitment to encourage and protect the investments of Taiwan compatriots in the mainland.

Taishan is no exception in working to attract investment from Chinese transnationals. Since the mid-1980s, Taishan's policy toward overseas Chinese added a new dimension – appealing to Taishanese transnational investment to accelerate industrialization in Taishan. The Taishan government implemented *Some Rules on Guiqiao and Qiaojuan's Developing Commercial Economy of Rural Agriculture* in 1987, followed by *Some Favorable Rules of Encouraging Foreign Investments on Export-Oriented Economy* in 1991, and *The Regulations of Encouraging and Rewarding Foreign Investment* in 1992. Another similar policy was also introduced in 1992. Two years later, the government promulgated *The Measures of Package Service for Foreign Investment*. In 1998, *The Favorable Policy to Further Encourage Foreign Investments and Domestic Private Enterprise Development* was promulgated (Mei, 2006:80). The central aim of these regulations were to encourage, attract, and utilize foreign investment, including Taishanese transnationals, by providing privileges

on taxation, financing, land use, hydro, communication, environment, licensing, and administration fees, etc.

Similar local rules have also been established in other municipalities and provinces. Guangzhou, in 1984, implemented *Temporary Preferential Measures Regarding Investments by Overseas Chinese and Hong Kong and Macao Compatriots in Guangzhou*, which reduced land use fees, relaxed restrictions on the domestic markets, awarded special titles to those who made major contributions to Guangzhou, and provided other benefits to the *huaqiao* and *tongbao* investors. In Zhuhai city, one of the four SEZs, overseas Chinese and compatriots were exempt from the "house tax" for five years, whereas other foreign investors were only exempt for three years (Bolt, 2000:61). In Fujian Province, Chinese transnational investors also enjoy privileges if they invest in real estate, agriculture, port construction, electricity, and highways (Zhuang, 2001:296). In Guangxi Zhuang Autonomous Region, enterprises owned by *guiqiao* and *qiaojuan* are exempt of income tax for a maximum of three years<sup>68</sup>.

Apart from policies regarding Chinese transnationals' remittances, donations, and investments, there have also been other policies established by various levels of government to regulate issues other than these monetary ones. For instance, young overseas returnees (*guiqiao*), their children, and children of *huaqiao* are provided with schooling privileges. Larger pensions were given to *guiqiao* retirees who had returned to China since 1949. In addition, there are policies stating that *huaqiao* tombs should be preserved and allowed to be repaired (Mei, 2006:52). In some cities, *huaqiao* cemetery parks have been built (Editors of China Yearbook, 1986:161). In 2003, the Taishan Government issued a rule that allowed

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<sup>68</sup> *Preferential Policy to Guiqiao and Qiaojuan Enterprises in Guangxi Zhuang Autonomous Region*. Information from website of the Overseas Chinese Affairs Office of the State Council of the PRC at <http://www.gqb.gov.cn/node2/node3/node5/node9/node102/userobject7ai1530.html>. Accessed on March 7, 2006.

foreigners of Taishanese origin to purchase land and build residential houses in their ancestral village<sup>69</sup>.

Discussed above are policies of the domestic sphere. In other words, many of the policies reflect certain expectations of *huaqiao* (Overseas Chinese), *tongbao* (compatriots), *guiqiao* (the overseas returnees), and *qiaojuan* (families members and relatives of *huaqiao*, *tongbao*, and *guiqiao* in the homeland) rewarding those who fulfill such expectations. The only precondition is that all these take place within the sovereignty of the PRC. Little, except for Chinese nationality, has been regulated in regard to the rights and obligations of *huaqiao* and *tongbao* abroad. Thus, Fitzgerald's remarks might be true -- the essence of overseas Chinese work is in fact domestic overseas Chinese affairs (Fitzgerald, 1972:73). Hence, China's policy toward Chinese transnationals has dealt with domestic issues rather than international ones. Essentially, what China has done with regards to overseas Chinese policy is only changed its attitude toward overseas Chinese's nationality. In 1980, China passed its first nationality law. It codified former premier Zhou Enlai's proposal during the Bandung Conference in 1955 (Fitzgerald, 1972:107-110), which required overseas Chinese to renounce their PRC citizenship after voluntarily acquiring citizenship in their country of settlement. Thus, by this law China rejected the possibility of dual citizenship.

Historically, the Chinese government's attitude toward Chinese abroad has always been shifting from an antagonistic to a patriotic perspective (Nyiri, 2002:208-211). During the Song (960-1279) and Yuan (1271—1368) dynasties, emigration, regarded as an act of disloyalty and betrayal to both ancestors and the empire, was largely prohibited. The Ming (1368-1644) lifted the ban and allowed Chinese to go abroad. When the Manchurian took

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<sup>69</sup> Web site of Taishan Foreign and Overseas Chinese Affairs Bureau (Taishan waishi qiaowu ju): <http://waiqiao.ts.gd.cn/Disp.Asp?ID=99&ClassID=2>. Accessed on Feb. 23, 2006.

power in 1644, had to deal with the resistance of and threats from the Ming survivors and loyalists, the Qing government not only reinforced the emigration ban, but also evacuated the coastal strips in the East and South. According to law, anyone going abroad would be executed upon capture. It was only after the first Opium War that the Qing government was obliged to open up its coastal regions to foreigners and lift its ban against emigration from the coastal regions such as Taishan (Zhuang, 1989). The punishments for emigration were not formally abolished until the early 1890s, and the Qing government tried to protect its citizens abroad (Yen, 1985). The patriotism perspective towards overseas Chinese originated from Sun Yat-sen's campaigns to obtain financial support from overseas Chinese for his efforts to overthrow the Manchurian monarchy. During the Republican period (1911-1949), the inclusion of overseas Chinese's participation in China's domestic issues was institutionalized; patriotism was the theme<sup>70</sup>. The PRC government followed this tradition during its early period but quickly became hostile towards Chinese outside of the mainland during the Cultural Revolution. After 1978, China resumed its policy of encouraging patriotism amongst Chinese transnationals.

For a historical viewpoint, the PRC's perspective of patriotism of Chinese transnationals is not new at all. It is only a recent episode in a historic cycle in which China's policy toward Chinese transnationals sways from an open to a closed attitude, or from a favorable to a hostile perspective. Hence, the CCP government's overseas Chinese policy in the reform era fits the old proverb of 'old wine in new bottles.' There have been different policies under different governments toward Chinese transnationals in different periods, but the purpose and essence of such patriotic policies remain the same – to obtain sizable remittances, to attract a large source of investment and donations, and to acquire useful skills

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<sup>70</sup> Taiwan authorities still maintain this policy.

and knowledge from the Chinese living abroad for China's domestic development are the major triggers of such policies.

Scholars have pointed out that the PRC's policy shifts have been based on China's "economic needs" (Chong, 1988; Fitzgerald, 1978:136) or "national interests" (Chang, 1980:291), rather than the "interests of overseas Chinese." True, the Chinese government has appreciated external economic forces by absorbing large amount of remittances, donations, and, to a lesser degree, investments since the early twentieth century. Besides, during the Land Reform and the Cultural Revolution when the Chinese transnationals, their dependents and other relatives were under attack, they were victims of China's leftist ideology and China's deteriorating relationship with some Southeast nations and the West. In all these cases, China's interests have been given priority. However, this assertion is only partially correct, as it considers only one side of the "coin." It is important to take into account Chinese transnationals' nostalgia, familism, and the culture of filial piety that compel them to uphold commitments to provide financial help to their dependents, relatives and the ancestral communities in the sending places. Some recipients, unlike the dependents in the past, do not even need remittances, but accept such external support anyhow. For them, it is simply a taken-for-granted notion that emigrants are obliged to financially support their wives, parents, and children. By remitting and donating, Chinese transnationals maintain or resume ties with their ancestral place, win recognition and even form identities when home away home. Their Chinese roots are thus strengthened. From the investment perspective, Chinese transnational entrepreneurs and businessmen are attracted to China's huge market, cheap raw materials and labour in the accelerating process of globalization, and in some cases, the favorable privileges offered by the local government. Their capital expands, and they are able



to earn profits when their investments are successful in the market. Therefore, by examining both sides of the “coin,” we can see that Chinese transnationals’ remittances, donations, and investments made under so-called “patriotism” are stimulated by common interests held by both the nation and its emigrants, and in turn, result in a win-win situation in which both China and the Chinese transnationals abroad are mutually benefited.

## **Chapter 5 Transnational Ties, Remittances, and the Household Economy**

From the very beginning of Chinese emigration, economic motivations have featured outward population flows. Chinese migrants were often considered “sojourners” by both themselves and local residents in the place of destination. They managed to make a living in their place of settlement, saving every penny they could to either transfer their savings to their families left behind in China, or use to bring their family members to join them overseas. The remittance flows of Chinese migrants are one of the tangible links between the place of destination and the homeland. As mentioned in Chapter 1, the importance of remittances from Chinese transnationals is often easily observable in the place of out-migration, but has unfortunately not been systematically examined. This chapter, by analyzing statistical data of the three longitudinal surveys in Jianglian village, Taishan, aims to fill in this gap. Specifically, I will explore the situation of Taishanese transnational connections and remittances, and attempt to examine the effects of remittances on family economic structure. I will also describe the patterns of the remittance flows over the last two and half decades.

### **Transnational ties and remittances**

The western part of the Pearl River delta is the major point of out-migration of Chinese to North America in terms of emigration history and emigrant population. Residents in this region, therefore, have extensive connections with Chinese transnationals by either blood or marriage (Johnson and Woon, 1997b; Woon, 1990). Jianglian village is likely typical of the region as a whole. Questions in the surveys regarding Chinese transnationals

start with inquiries into whether the local families in Jianglian have connections with any transnationals, what the nature of these ties are and how these ties are maintained (see Appendix 2). The research shows that it is common for local residents to have a high proportion of transnational ties. Around two-thirds of the households in Jianglian have reported that they have close connections with Chinese transnationals (Table 5.1).

Table 5.1 Proportions of Households with Transnational Ties  
and Remittance Households<sup>71</sup>

Category	1986	1994	2000
Households (N)	99	54	75
Households with transnational ties (N, %)	65 (65.7)	35 (64.8)	52 (69.3)
Households who receive remittances (N, %)	60 (60.6)	30 (57.4)	45 (60.0)

This is consistent with the finding within the Duanfen Township that nearly 70 percent of residents have family members or relatives living abroad (Mei, 1991:2-3). In the Siyi area (Taishan, Kaiping, Xinhui, and Enping Counties), official statistics show that some 60 percent of the total population (about six million residents) have transnational links (Guangdong Provincial Bureau of Statistics, 1987:313). This is the reason why Taishan and, more widely, Jiangmen, are considered famous *Qiangxiao* in China, not only because they have a long history of emigration and a large transnational population abroad, but also

<sup>71</sup> Survey questions: Have you or any of your family members been in touch with a family member or a relative who currently resides in Hong Kong, Macao, or overseas? Does this person remit to you/your family or bring cash to you/your family when they come to visit?

because they have maintained extensive connections with the emigrants and their descendants.

For the local residents, most of whom are formally titled *nongmin* (peasants), having transnational ties involves communicating with overseas relatives through visits, phone calls and letters, but most importantly is characterized by receiving financial help from their transnational family members or relatives. Thus, remittances are often associated with transnational connections. In all three surveys, more than fifty-seven percent of the total households received remittances (hereafter, remittance households) at the time surveyed (Table 5.1). Furthermore, of the households that have transnational ties, around ninety percent receive remittances<sup>72</sup>.

It is also worthy to note who these remitters are in terms of their relationship to the receivers. Yu (Yu, 1979a:452) has noted that the amount of remittances varies according to the closeness of the overseas ties. Woon and Johnson (Johnson and Woon, 1997b:47-48; Woon, 1990:150), in their discussion of the closeness of Chinese transnational connections, categorize local households into three types: non-*qiaojuan* households (households without overseas relatives), distant *qiaojuan* households (those with distant overseas relatives) and direct *qiaojuan* households (those with immediate family members abroad). However, as I argued in Chapter 2, using the term “*huaqiao*” and other related terms such as “*qiaojuan*” contain political bias and are thus inappropriate. Based on the nature of transnational ties, I divide the remitters into two types – immediate remitters (remitters of immediate relationship with the receivers’ households) and distant remitters (remitters of distant relationship with

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<sup>72</sup> Calculated from Table 5.1, the percent is 92.3, 85.7, and 86.5 in each survey respectively. It would be interesting to examine the correlation between the number of transnational ties and the amount of remittances. For instance, the more transnational ties a local household has, the more remittances it likely receives. However, the surveys do not have such data on the number of ties.

the receivers' households), which are quite similar to Johnson and Woon's categories. By "immediate," a remitter has a nuclear-family relationship (spousal, parent-child, or sibling relationship) or a stem family relationship (includes grandparent-grandchild relations in addition to nuclear-family relationships) with any one of the receivers' households. In other cases, remittance senders that have a distant relationship with the receivers' households are called distant remitters. Theoretically, a remitter could have both immediate and distant relationships with at least two receivers' households. Likewise, a local household could have multiple remitters who could be of both relationships. The survey data show that a local household may have more than one remitter; however, these relationships are either of all immediate or all distant. A possible explanation is that, in the case that a local household has multiple transnational ties of both immediate and distant relationships, the transnational ties, often as a consequence of chain migration, know each other and leave the most capable tie to remit. Thus the remitters are usually of the same relationship with the recipient. This assumption needs to be tested in future studies.

Table 5.2 below shows the household proportions categorized by the nature of the remitter ties. The majority of remittance sources are from remitters with an immediate relationship with the receivers. Most of the remittance households benefited from immediate relationships with transnationals, especially those in the last two surveys. Relationships between individuals in traditional Chinese society are based upon kinship, the connection by blood, marriage, or adoption (Freedman, 1965; Kulp, 1925). According to Fei Xiaotong's (or Fei Hsiao-t'ung) theory on the cobweb networks of Chinese society (Fei, 1998:26), obligations and commitments of one person to another is positively associated with the closeness of their relationship. From another angle, the statistics in Table 5.2 confirm that

behind the transnational remittance flows is the dominance of close personal relationship between the remitters and receivers.

Table 5.2 Household Categories by Relationship with Remitters<sup>73</sup>

Category		1986	1994	2000
Households With Immediate Remitters	N	32	21	33
	% of all households	32.3	38.9	44.0
	% of remittance households	53.3	70.0	73.3
Households With Distant Remitters	N	28	9	12
	% of all households	28.3	16.7	16.0
	% of remittance households	46.7	30.0	26.7

Another trend observable from Table 5.2 is the decrease of the proportion of distant remitters over the years. This can be explained by two factors. On one hand, during the 1980s when China reopened its door after it had largely cut off international migration for nearly two decades (as discussed in Chapter 4), many family members of the Chinese emigrants in the places of origin had passed away. Were there transnational ties, remittance receivers would most likely be descendents of the older generations who emigrated before the 1950s, and thus were likely to be distant relatives. This is why the percentage of distant remitters was relatively high in the first survey. On the other hand, an increasing number of Taishanese who have been allowed by the government to emigrate during the recent decades has resulted

<sup>73</sup> Survey question: What is (are) the relationship(s) between you and the remitter(s)?

in new and more immediate transnational ties. They keep frequent and close contact with their family members left behind and remit to them.

Table 5.3 Occupation of Primary Remittance Contributor, 2000<sup>74</sup>

Occupation of Remitters	N (%)
Labourer	28 (62.2)
Business owner	11 (24.4)
Economic dependent (housewife, no job, or other type of economic dependent)	6 (13.3)

In addition to the nature of transnational ties, one may argue that the economic situation of the remitters at the place of destination should also be taken into consideration. In all the surveys, North America, Hong Kong, and Macao were the top three sending places of remittances. More than two-thirds of the remitters were from the US and Canada. Income levels in these economically advanced areas are much higher than in the Chinese mainland. Yet, many of the remitters are not well off according to the income standards in these places of destination. In the 2000 survey, we asked about the occupation held by the primary contributor of remittances for each household. Statistics revealed that the majority are wage labourers, such as factory workers, restaurant waiters/waitresses, and cashiers (Table 5.3). Some are even economic dependents (household wives or those with no occupation). In these cases, the transnationals remit to their relatives in Taishan because of their obligations to

<sup>74</sup> Survey question: What does the remitter do for a living?

those left behind, not because of their economic status which is likely lower class. A few of the remitters own chain restaurants and groceries.

### **Remittance flows**

As discussed in the literature review of Chapter 2, neither the volume nor the dynamics of Chinese transnational remittances over the years has been well-documented, which is largely due to the lack of data at both the micro and macro levels. Since the early 1990s, Chinese authorities have released little statistical data on *qiaohui* (Chinese transnational remittances) as FDI is assumed to dominate the international monetary transactions to China. This reflects a taken-for-granted assertion that the flows of remittances to China are insignificant and thus warrant little or no attention<sup>75</sup>. However, statistics from the surveys reveal that transnational remittances are not only a dependable source of income to the receiving households in the local community, but also flow into China in significant volumes.

Table 5.4 shows the number of remittance households, average remittances per household, and the total volume of remittances to Jianglian village recorded in the three surveys. The average remittances per remittance household and the total volume of remittances to Jianglian village in 1999 increased 6.3 and 4.7 times respectively since 1985. However, we cannot conclude that remittances have dramatically increased over the years based on this information alone; inflation must be taken into account. The retail price index of industrial products of rural Guangdong in 1993 was 2.0 times that in 1985, and the index

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<sup>75</sup> In my interview of a key official of the Guangdong Overseas Chinese Affairs Office in January 2005, I explained my research purpose on remittances to him. The official said, "Why do you want to engage in such a study? *Qiaohui* (overseas Chinese remittances) are meaningless, and nobody cares them. *Mei yi si, mei yi si* (meaningless)!"



in 1999 was 2.4 times that in 1985<sup>76</sup>. After adjusting for inflation, it can be concluded that both average household remittances and total remittances to Jianglian village, in terms of Renminbi value, have significantly increased from 1985 to 1999.

Table 5.4 Remittance Flows to Jianglian Village<sup>77</sup>

(Remittance: RMB yuan)

Category	1985	1993	1999
Households (N)	100	54	75
Households providing remittance income (N)	57	31	43
Average remittances/per remittance household	1,386	5,141	8,713
Sum of remittances in Jianglian Village	79,002	159,380	374,650

The increasing remittances can be explained by two factors. First, the general economic situation in the source countries/areas of remittances, such as the US, Canada, and Hong Kong, had greatly improved during the 1980s and 1990s, thus raising personal income. For instance, the mean income of US families was \$32,944 USD in 1983, increasing to \$47,221 in 1993, and rising further to \$62,636 in 1999<sup>78</sup>. Second, foreign exchange rates also influenced the potential purchasing power of the remittance recipients. During the 1980s and

<sup>76</sup> Calculated from Appendix 8. This index in 1985, 1993 and 1999 was 113.3, 225.6, and 275.6 respectively.

<sup>77</sup> Survey question: On average, how much money does this person remit or bring each time?

<sup>78</sup> Figures come from US Census Bureau. Statistics of historic average family income in US can be found at <http://www.census.gov/hhes/income/histinc/t07.html> (Accessed on July 10, 2006).

1990s, China's Renminbi had been dramatically devalued against foreign currencies, such as the US dollar and Hong Kong dollar (See Appendix 4)<sup>79</sup>. As a result, remittance recipients greatly benefited from the changing currency exchange rates.

Yet, official macro-data of the volume of remittances flowing into Taishan do not support my findings in Jianglian village. According to the official statistics from the Taishan Branch of the State Administration Bureau of Foreign Exchange, the total volume of transnational remittances in 1979 was \$33,361,087 USD and hit a high of \$36,371,066 in 1980 (Table 5.5). Since 1984, transnational remittances had generally experienced a sharp decline, with a record low in 1993. During the late 1990s, the volume of remittance rebounded, and reached a new high of \$77,482,893 in 2002<sup>80</sup>. Statistics of foreign currency transfers to China at the national level during the 1980s and 1990s also reflect a similar pattern (Ding, 1998:29).

These figures might suggest that the overall amount of remittances from Chinese transnationals had decreased during the ten years after 1983. However, statistics of personal savings in foreign currencies from the same official resource tell another story (Table 5.5). Personal savings in foreign currencies in Taishan has steadily increased every year from 1987 to 2002. In 2001, the total amount of such savings was more than forty-seven times that in 1987 (Table 5.5).

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<sup>79</sup> According to Appendix 4, the exchange rate of US dollar for RMB in 1985, 1993 and 1999 was 293.67 yuan, 576.19 yuan, and 827.83 yuan respectively. The exchange rate of HK dollar for RMB in the same years was 37.57 yuan, 74.41 yuan, and 106.66 yuan respectively.

<sup>80</sup> Figures of total annual remittances to Taishan in Table 5.5 are questionable since the statistics dramatically changed over a short period. For instance, the figure was \$39,963,057 in 2000, but jumped incredibly to \$63,555,663 in 2001 and \$77,482,893 in 2002, then dropped to \$13,658,275 a year later.

Table 5.5 Annual Remittance Volume and  
Personal Savings in Foreign Currencies in Taishan, 1979-2003

Year	Transnational remittances (US dollars)	Personal savings in foreign currencies (10,000 US dollars)
1979	3,336,187	
1980	36,371,066	
1981	31,934,855	
1982	35,652,686	
1983	30,221,714	
1984	22,266,079	
1985	12,660,260	
1986	13,487,882	
1987	9,818,601	914
1988	5,769,148	1,886
1989	2,921,387	3,477
1990	4,462,250	5,891
1991	7,278,473	7,729
1992	6,910,264	8,342
1993	2,180,344	1,0101
1994	11,741,005	11,326
1995	19,261,650	12,341
1996	23,450,000	12,939
1997	20,030,000	15,088
1998	21,375,864	20,914
1999	41,595,748	37,695
2000	39,963,057	41,460
2001	63,555,663	43,189
2002	77,482,893	
2003	13,658,275	

Source: provided by the Taishan Branch of State Administration Bureau of Foreign Exchange.

So, where are these personal savings in foreign currencies coming from? China has implemented a policy of controlled foreign currency (on both exchange rates and transfers across the national border) since the early 1950s, under which Chinese citizens cannot purchase any foreign currency in a financial institution without official approval or a legal reason recognized by the government (for example, to travel or to migrate to other countries). Also, given that Chinese citizens are only allowed to exchange a limited amount of foreign currencies, most prefer exchanging currency on the black market instead of in banks designated by the government as black market exchange rates are often higher than those set officially<sup>81</sup>. During my fieldwork, I interviewed several persons in Jianglian and Taicheng, Taishan's capital, who were remittance receivers. All of them said they would save their remittances in foreign currency in banks and exchange them for Renminbi on the local black markets when they needed to spend the remittances. Hence, such personal savings in foreign currencies come mainly from transnational remittances, which flow into China through two channels – institutional transfers and cash brought by travelers (*yichao daihui*)<sup>82</sup>.

Yet, the Chinese authorities can do little to monitor and follow the volumes of cash brought in by individuals, and the statistics of remittances include only those funds transferred by legal channels, such as banks and post mail. This gives rise to an inconsistency in the dynamics of transnational remittances and those of personal foreign currency savings. In the case of Taishan, it is clear that the volume of foreign remittances fluctuates while the

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<sup>81</sup> The black market, greatly stimulated by the foreign currency demand in China and China's stubborn official exchange rates, plays a not-to-be-ignored role in China's foreign exchange industry. As the black market often provides traders better prices and a larger supply of desired foreign currencies, its existence is common in metropolitan cities and coastal regions. The more information about China's foreign exchange black market, please refer to Ding (Ding, 1998).

<sup>82</sup> For Chinese policy of institutional transfers of transnational remittances, please refer to Chapter 4. For information of *yichao daihui*, please refer to Chapter 2.

amount of personal foreign currency savings increases steadily. With the evidence from the surveys, the latter is more convincing in reflecting the trend of remittance flows into Taishan than the former which systematically underestimates (or even ignores) the cash brought by transnationals crossing the border and excludes the activities of the foreign exchange black market.

Therefore, it is safe to say that during the last two decades of the last century, the volumes of transnational remittances into Taishan, and possibly in other *qiaoxiang* areas in the western Pearl River delta as well, have significantly increased. Volumes of remittances are influenced by both the economic situation of the senders and the institutional changes within China.

### **Remittances and household income inequality<sup>83</sup>**

It has been observed that *qiaojuan* families usually have higher standards of living than other villagers in many *qiaoxiang* of Guangdong and Fujian provinces (Chen, 1940; Parish, 1978:57; Yu, 1979a:451). Behind this phenomenon is the fact that many *qiaojuan* families have higher family incomes than non-*qiaojuan* (Su, 1988:31; Woon, 1990:151). The fact that *qiaojuan* households have higher incomes is a direct cause/consequence of remittances sent by their Chinese transnationals, which are a dependable source of non-earnings. Findings of the three surveys confirm that remittances are an important source of income for the receivers. They not only play a crucial role in the income gap between non-

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<sup>83</sup> Household income in the three surveys refers to gross total of earned and non-earned income in the previous year. The former type includes cash income and other types of income, such as grain income and property income. The latter mainly includes remittances. Grain Income is converted into cash according to the local market price at the time the survey was conducted. Peasants in China before 2004 only paid agricultural tax which is an insignificant quota of cash or grain. Thus, there is no significant difference between income-before-tax and income-after-tax.

remittance households and remittance households, but also in widening income inequality among the remittance households as remittances evenly distribute.

Table 5.6 Weight of Remittances in Household Income

Percent of remittances in household income	1985	1993	1999
	(%)	(%)	(%)
Valid N	57	30	43
Percentage of total income from remittances (mean)	35.1	31.0	43.5
100% or complete remittance dependents (N, %)	6 (10.5)	3 (10.0)	9 (20.9)

According to the three surveys (Table 5.6), the average weight of remittances in total household income exceeds 30 percent in each survey, and the average weight in the last survey is as high as more than 40 percent. All these numbers show that remittance income occupy a considerable proportion of total household income in general. Particularly, there were some households that depended completely on remittances for their source of income (complete remittance dependents). For instance, there were 9 households (about 21%) in the 1999 survey whose income came entirely from remittances. For these households, a disruption of remittances means a loss of their source of income.

Table 5.7 Remittances and Household Income

(RMB *yuan*)

Category		Annual Average income			Annual Per capita income		
		1985	1993	1999	1985	1993	1999
All households	<b>Mean</b>	<b>3,712</b>	<b>13,277</b>	<b>16,430</b>	<b>812</b>	<b>2,579</b>	<b>4297</b>
	Valid N	91	53	73	91	53	73
Non-remittance households	<b>Mean</b>	<b>2,889</b>	<b>10,274</b>	<b>9,963</b>	<b>651</b>	<b>1,772</b>	<b>2,201</b>
	Valid N	35	23	30	35	23	30
Remittance households	<b>Mean</b>	<b>4,204</b>	<b>15,580</b>	<b>21,079</b>	<b>909</b>	<b>3,199</b>	<b>5,820</b>
	Valid N	56	30	43	56	30	43

Remittances, as an additional non-earning source, stratify remittance households (the haves) and non-remittance households (the have-nots) in terms of income level. Table 5.7 illustrates the average income and per capita income of all households, non-remittance households, and remittance households of the Jianglian village in the previous year of each survey<sup>84</sup>. Statistics show that similar trends exist in all three surveys – in terms of either annual average income or annual per capita income, households that have remittances are much richer than those without remittances (Table 5.7)<sup>85</sup>. The average income of remittance households was 1.45 times of that of non-remittance household in 1985. The figures for this

<sup>84</sup> Annual household income is the most common indicator of the income level of a household. However, in some cases per capita income is an important indicator reflecting a household's real financial situation with respect to daily expenses. For instance, a household of a couple and three school children with an annual household income of 20,000 yuan will have a completely different financial situation from that of a household without children earning the same amount. This is why I am using both of the indicators here.

<sup>85</sup> Another interesting finding from Table 5.8 that might be less related to the focus of this chapter is that the average household income of non-remittances household in 1999 slightly declines from that in 1993. This is because non-remittance households, whose major income relies heavily on agricultural production, had suffered stagnation of agricultural development in the 1990s (Gao, 1995).

in 1993 and 1999 were 1.52 and 2.04, respectively. This confirms the finding that those with external financial aid in the form of remittances are wealthier than those without in the local community. In addition, it seems the income disparity between the haves and have-nots has been growing over the years, and thus non-remittance households become more and more relatively deprived in terms of income.

Table 5.8 Interquartile Range (IQR) of Each Household Group

Category		1985	1993	1999
All Households (yuan)	N	91	53	73
	<b>IQR</b>	<b>2,065</b>	<b>13,900</b>	<b>14,600</b>
	Median	2,780	8,900	10,000
Non-remittance Households (yuan)	N	35	23	30
	<b>IQR</b>	<b>1,500</b>	<b>7,000</b>	<b>10,625</b>
	Median	2,200	6,800	8,500
Remittance Households (yuan)	N	56	30	43
	<b>IQR</b>	<b>2,200</b>	<b>16,150</b>	<b>21,000</b>
	Median	3,500	12,700	13,000

To further illustrate the income gap among the household groups, I turn to the interquartile range (IQR), the gap between the first (lower) and the third (upper) quartiles and a measure of dispersion. Table 5.8 summarizes the results. In each survey wave, non-remittance households had the lowest IQR, and remittance households had the largest. This



means non-remittance households have the least income disparity, whereas the remittance households have the highest.

To better understand the income disparity with standardized figures, I introduce an economic indicator – the Gini coefficient. The Gini coefficient (Gini, 1921, 1955) is an important indicator that measures the degree of inequality in the distribution of income, property, welfare and other socio-economic indices in a given population. The coefficient is a number ranging from 0 to 1, where zero indicates the minimum inequality for a society in which each member receives exactly the same income and one indicates the maximum inequality where one individual collects all the income and the rest get nothing.

In rural China, collective lands (the basic economic security for a peasant) and other social and economic benefits are often distributed among households according to the number of members in each household. Also, the majority of household daily expenses (expenses on education, birth/wedding ceremonies, housing, etc.) vary according to the number of children in a household. Thus, I chose the annual per capita income of each household for the calculation of the Gini coefficient, for per capita income is better than the total household income in reflecting household income-expense situations<sup>86</sup>. These calculations<sup>87</sup>, the Gini coefficients of annual per capita income distributions of all households, remittance households, and non-remittance households, are shown in Figure 5.1 which, again, illustrates income inequality among grouped households. In all the surveys, the Gini coefficient of remittance households is significantly larger than that of non-remittance households, which means that remittance households are more stratified in terms of income

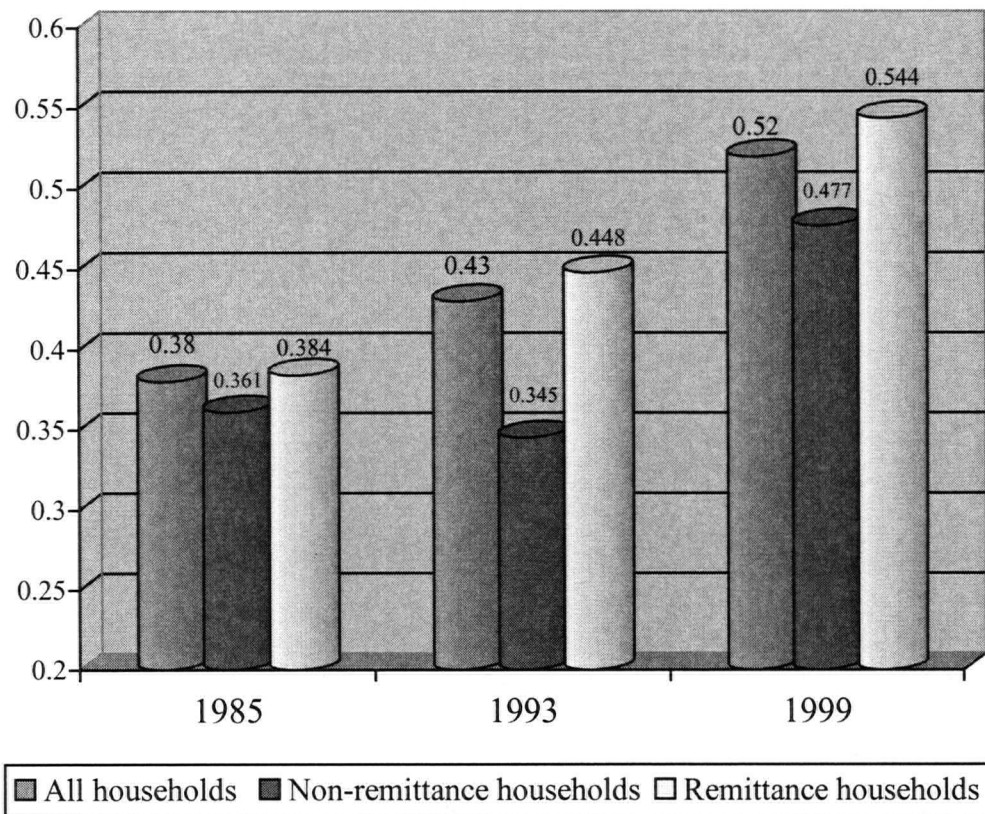
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<sup>86</sup> However, I also calculated the Gini coefficients of grouped households according to the household income. The results reflect a similar trend, though the coefficients are slightly different from the calculation by per capita income.

<sup>87</sup> The Gini coefficient is computed in a free on-line calculator provided by the website of “Free Statistics and Forecasting Software” at <http://www.wessa.net/co.wasp>, to which I am extremely grateful.

than non-remittance households. Although the longitudinal Gini coefficients of non-remittance and remittance households exhibit a similar trend of significant increases (Figure 5.1), that of remittance households is still larger.

Figure 5.1 Gini Coefficient of Annual Per Capita Income



It is easy to understand that remittance households have higher incomes than non-remittance ones because they have extra income in the form of financial support from their transnational family members or relatives. However, the larger income inequality found among remittance households as compared to non-remittance ones is surprising. This is

partially due to the fact that remittances are not evenly distributed among the remittance households – some receive thousands of dollars in remittances, whereas some dependents cannot receive enough remittances for basic expenses. Good examples of such contrast are Mr. Ho and Mrs. Ruan depicted in the beginning of Chapter 1. If remittance dependent households cannot receive enough remittances they need for their daily necessities (as they do not earn much income from other sources), they will become the most economically vulnerable in the village. In the 2000 survey, 51 percent of remittance households expressed concern that they would face severe financial difficulties if their transnationals stop remitting.

### **Remittances and lifestyle**

As I have pointed out, remittances are a type of reliable income for some households and those receiving transnational remittances are wealthier than other households in general, with more funds available for a more affluent life-style. They tend to live in splendid houses (many built with foreign stylistic elements) with elaborate furniture inside, spend more on leisure activities and ceremonies, and invest in education for their children (Chen, 1940:86-113; Johnson and Woon, 1997b:49; Vogel, 1969:21). Wives and mothers of Chinese transnationals, who live in China, wear fancy clothes and expensive jewelry<sup>88</sup> (Hsu, 2000a:44; Williams, 2002:75-76). The elegant life of remittance dependents can be glimpsed from their consumption style, one of the major aspects of the way that remittances are spent, and be compared with that of their non-remittance counterparts.

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<sup>88</sup> Women receiving transnational remittances and wearing jewelry and gold accessories were called “Gold Mountain Women” (*Gum-sam-poh* in Cantonese) (Williams, 2002:75).

Table 5.9. Clothes-Shopping Locations 1986<sup>89</sup>

Clothes-shopping Locations	Non-remittance households (N, %)	Remittances households (N, %)
Township marketplace	25 (69.4)	21 (34.4)
County (city) capital	2 (5.6)	20 (32.8)
Jiangmen	0 (0)	11 (18.0)
Guangzhou	0 (0)	2 (3.3)
Other locations	2 (5.6)	2 (3.3)
Multiple	7 (19.4)	5 (8.2)

Patterns of clothes-shopping locations reflect different consumption styles between non-remittance and remittance households. In the 1986 survey (Table 5.9), only about one-third of remittance households often purchased clothes in the township marketplace, which is within a ten minute walk. More than half of them expanded their clothes-shopping circles to the county capital -- Taicheng, 27 km away, Jiangmen -- the regional centre of western delta, and Guangzhou -- the provincial capital, 180 km away. In comparison, nearly 70 percent of non-remittance households limited their clothes shopping to the town marketplace, and only a little more than 5 percent of them went to as far as the county capital. The differentiated shopping patterns reflect the varying consumption abilities between remittance and non-remittance households, as Taicheng, Jiangmen, Guangzhou provide more choices and

<sup>89</sup> Survey question: Where do you often purchase clothes?

expensive goods than Shandi, the town marketplace<sup>90</sup>. In addition, people travelling to the location have to pay more on transportation (as well as potential accommodation).

The shopping items of the two types of households also differed greatly – remittance households purchase expensive and fashionable appliances, whereas the others usually do not. In the 70s and early 80s, television sets (black and white), sewing machines, watches, and bicycles were expensive commodities that ordinary peasant families needed to save up for years to purchase. Owning a colour TV was a dream that most families could not even imagine. The 1986 survey showed that more remittance households have these expensive appliances than their non-remittance counterparts. Particularly, higher proportions of remittance households own sewing machines, watches, and bikes (Table 5.10). For instance, in 1986, not a single non-remittance household owned a colour TV, while one could be found in every five households receiving remittances.

In the 90s, owning a colour TV was no longer a far-fetched dream for many households anymore. Washing machines, refrigerators, motorcycles, and telephones became the hot consumer items that peasant households wished to purchase. The 1994 survey illustrates that possession of these appliances was significantly higher for remittance households. There were four remittance households whose colour TVs were brought back by their transnationals from outside of China, and one case whose refrigerator was brought back in the same manner.

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<sup>90</sup> According to Skinner's theory, the town marketplace serves as a standard market, the county capital, Taicheng, is an intermediate one, and Jiangmen and Guangzhou are both considered central markets. For more about China's marketing system, please refer to Skinner's classic studies (Skinner, 1964, 1965a, 1965b).

Table 5.10 Commodities Owned by Remittance and  
Non-remittance Households, 1986-2000<sup>91</sup>

Possession of expensive items	1986		1994		2000	
	Remittance households N (%)	Non- remittance households N (%)	Remittance households N (%)	Non- remittance households N (%)	Remittance households N (%)	Non- remittance households N (%)
Sewing machine	48 (80.0)	21 (55.2)	--	--	--	--
Bike	56 (93.3)	35 (92.1)	--	--	--	--
Watch	52 (86.7)	31 (81.6)	--	--	--	--
B&W TV	19 (31.7)	7 (18.4)	--	--	--	--
Colour TV	12 (20.0)	0	25 (83.3)	11 (45.8)	45 (100.0)	30 (100.0)
VCR	--	--	2 (6.7)	0	33 (73.3)	17 (56.7)
Washing machine	--	--	26 (86.7)	13 (54.2)	39 (86.7)	24 (80.0)
Motor bike	--	--	5 (16.7)	2 (8.3)	15 (33.3)	7 (23.3)
Fridge	--	--	10 (33.3)	2 (8.3)	22 (48.9)	7 (23.3)
Telephone	--	--	10 (33.3)	2 (8.3)	38 (84.4)	17 (56.7)
Pager	--	--	2 (6.7)	0	8 (17.7)	6 (20.0)
Cell phone	--	--	2 (6.7)	0	16 (35.6)	4 (13.3)

<sup>91</sup> Survey question: Which of the following items does your family own?

In the late 1990s, sewing machines and TVs were no longer seen as rare and costly items. Instead, entertainment electronics and telecommunication devices were regarded as emblems of wealth and social status. In the 2000 survey, larger percentages of remittance households reported owning VCRs, refrigerators, telephones and mobile phones (once called *Dageda* in Chinese during the 1980s and 1990s) as compared with non-remittance households (Table 5.10). Once again, Table 5.10 suggests that remittance households have a more affluent lifestyle than non-remittance ones, although clearly all households had become decidedly more affluent over almost two decades of reform.

Where do households turn to for help if extra funds are needed<sup>92</sup>? The three surveys illustrate that remittance households consistently turn to their transnational relatives for financial help should require outside assistance. One-third of remittance households in the 1986 survey reported that they would turn to their transnational ties for help. In 1994, the proportion remained the same, whereas in the 2000 survey it increased to 43 percent. In the same data set for 2000, about 51 percent of remittance households expressed concern that they would face financial difficulties if their transnationals stop remitting.

It is also interesting to note the reasons (or excuses) that remittance households have for requesting financial support from their transnational relatives (Table 5.11). In the 1986 survey, expanding economic production was ranked as the top reason. The second most common response was "other reasons," followed by housing renovation or building a new house. In the 1994 survey, wedding, education, and housing were the top three reasons given for requesting extra funds, with economic production placed fifth. In the 2000 survey, education became the most common reason for requesting outside financial assistance, most

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<sup>92</sup> Survey question: If you need to borrow money, would you borrow from a family member or a relative residing in Hong Kong, Macao, and overseas?

likely due to the educational reforms China made in the 1990s. Under these reforms, more students have the chance to attend post-secondary institutions, but not without paying substantial tuition costs. These astonishing increases in tuition fees are worrisome for parents, especially peasant parents (Fan, 2004; Hao, 2001; Seeberg and Weiping, 2001; Zhang, 2001b). Thus, for families whose children plan to go to college or university, higher education will be extremely expensive and likely impossible without enough saving or extra support.

Table 5.11 Popular Reasons among Remittance  
Households for Transnational Support<sup>93</sup>

Ranking order	1986 Survey (N, %)	1994 Survey (N, %)	2000 Survey (N, %)
1 <sup>st</sup> Rank	Economic production (40, 66.6)	Wedding (10, 33.3)	Education (16, 47.1)
2 <sup>nd</sup> Rank	Other (20, 33.3)	Education (7, 23.3)	Health (10, 29.4)
3 <sup>rd</sup> Rank	Housing (16, 26.7)	Housing (6, 20.0)	Housing (7, 20.6)
4 <sup>th</sup> Rank	Wedding (5, 8.3)	Heath (4, 13.3)	Wedding (4, 11.8)
5 <sup>th</sup> Rank	Education (5, 8.3)	Economic production (2, 6.7)	Economic production (3, 8.8)
6 <sup>th</sup> Rank	Health (3, 5.0)	Other (0, 0)	Other (3, 8.8)

<sup>93</sup> Survey question: Please list the reason(s) that you need to borrow money.



The changing orders of the reasons that the locals need extra funds from transnationals indicate the changing situation of financial burdens of Chinese peasants from a special angle. The top reason over the years reflects what Chinese peasants were worried most for their household budget – economic production in the 1980s, ceremonial expenses in mid-1990s, and social security recently.

### **Remittances and economic strategy**

Studies have found that the availability of transnational remittances often results in able-bodied peasants who become reluctant to engage in farm production (Parish, 1978:26-27; Yu, 1979a:453). Households without remittances have to focus on cash cropping, whereas a high proportion of those with remittances tend to engage in a combination of agricultural production and non-agricultural activities (Tan, 1988:90). Thus, households with remittances employ different economic strategies than those without. Historical records and many individual memoirs suggests there is a close link between certain household economic strategies and remittances (Chan, 2006a:7; Liu, 2004:4; Mei, 2005:92). The available abundance in remittances provides more opportunities for remittance dependents to focus on consumption rather than production. *Qiaojuan* usually have more capital available for expenses, such as wedding or funeral ceremonies, celebrating festivals or a new birth, and building new houses (Yu, 1979a:451). Many male adolescents and young men who were dependents in the emigrant communities in Taishan were spoiled with such an affluent material life and thus engaged in deviant activities such as drinking, drugs, gambling and spending much of their time in brothels (Mei, 1996:71-72; Mei, 2005:98-99). When the influx of remittances was disrupted unexpectedly, the economic strategies and lifestyles of

the dependents who were used to spending remittances suddenly changed – the former remittance dependents had to rely on themselves and became willing to do whatever possible to make a living (Woon, 1998).

Yet, little is known about the degree to which the developmental strategies of remittance households and non-remittance households differ, and how these strategies have changed over time. To answer these questions, I have identified six household economic strategies according to the principal source of household income:

- a. Subsistence: mainly agricultural production, products roughly sufficient to maintain daily life without much income;
- b. Cash-cropping: mainly agricultural production and other sidelines in the primary sector, some products sold for cash income;
- c. Small business or non-agricultural employment: major income comes from small businesses, such as grocery stores in the village or vending in the local market; or non-agricultural employment in manufacturing or commerce;
- d. Large business or cadre: family owns a factory or company; or has members who hold positions as the cadres in the village or the government<sup>94</sup>.
- e. Remittances: households mainly depend upon transnational remittances;
- f. Multiple: combination of at least two of the above strategies.

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<sup>94</sup> The reason why I put the two types of households together is that, according to Weber (Weber, 1946:180-195), large businesses can bring in wealth and official positions, with prestige and potential resources of political power, can also bring in potential wealth.

Table 5.12 Frequencies of Household Economic Strategies

Category		Types of Economic Strategy (% of each household category)					
		Subsistence N (%)	Cash- cropping N (%)	Small business or non-agricultural employment N (%)	Large business or cadre N (%)	Remittance N (%)	Multiple N (%)
1986	Non-remittance Households (N= 38)	2 (5.3)	19 (50.0)	12 (31.6)	3 (7.9)	N/A	2 (5.3)
	Remittance Households (N= 60)	0 (0)	10 (16.7)	17 (28.3)	2 (3.3)	26 (43.3)	5 (8.3)
	All households (N= 98)	2 (2.0)	29 (29.6)	29 (29.6)	5 (5.1)	26 (26.5)	7 (7.1)
1994	Non-remittance Households (N= 23)	2 (8.7)	8 (34.8)	4 (17.4)	0 (0)	0(0)	9 (39.1)
	Remittance Households (N= 30)	0 (0)	3 (10.0)	3 (10.0)	1 (3.3)	16 (53.3)	7 (23.3)
	All households (N= 53)	2 (3.8)	11 (20.8)	7 (13.2)	1 (1.9)	16 (30.2)	16 (30.2)
2000	Non-remittance Households (N= 30)	1 (3.3)	8 (26.7)	20 (66.7)	0 (0)	N/A	1 (3.3)
	Remittance Households (N= 45)	0 (0)	3 (6.7)	6 (13.3)	2 (4.4)	17 (37.8)	17 (37.8)
	All households (N= 75)	1 (1.3)	11 (14.7)	26 (34.7)	2 (2.7)	17 (22.7)	18 (24.0)

Table 5.12 shows how economic strategies differ between non-remittance and remittance households. There are a few non-remittance households rely on subsistence economy, however, none of the remittance households relies on such a strategy. In addition, there are consistently more non-remittance households which employ a cash-cropping strategy than remittance households. A similar pattern also exists in business or non-agricultural employment between the two types of households. In regards to remittance households alone, a relatively large proportion of them are remittance dependents, and the percentage of those engaging in the cash-cropping economy has steadily declined over time. At the same time, the proportion of those choosing a multi-strategy has significantly increased. These findings suggest that remittance households have become less and less interested in farming-related economic production over time. In comparison, non-remittance households often develop self-reliance strategies by engaging in farming-related production, setting up small businesses (venders in the local markets and groceries), or seeking employment opportunities in industrial and service sectors.

This finding is supplemented by the phenomenon of farmland displacement in *qiaoxiang* areas. By the end of a farmland contract under the household responsibility system, many remittance households chose not to renew their contracts, or decided to sublet their paddy land to labour immigrants from other places (Johnson and Woon, 1997b:745; Woon, 1990:157). In the 2000 survey, 24 percent of remittance households had sublet their farmland to others, and four percent intended to return their farmland to the collective<sup>95</sup>. Only seven percent of the non-remittance households had sublet farmland and none of them planned to return their land to the collective after the contract ended. Of all the households that had

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<sup>95</sup> Under China's household responsibility system, farmland *de jure* belongs to the collective – the village. Peasants must sign a contract with the collective for ownership of farmland for a fixed term, and then renew the contract to keep the land for another term.

already leased their farmland land to others, most of whom were labour migrants from the poor regions in western Guangdong and Guangxi provinces, 83 percent were remittance households.

### **Transnational ties and the desire to emigrate**

Migration often takes place through chain migration, either domestic (Zhang, 2001a) or international (Graves and Graves, 1974a; Massey, 1990). Chain migration dominates Chinese emigrations (Chan, 1983; Chan, 2006b; Hsu, 2000a). After China liberalized its policy towards emigration in 1978, more and more Chinese were allowed to leave China to join their transnational relatives. This has been the case particularly in the western Pearl River delta. A substantial number of people have left Taishan and other parts of the region to join their family members or relatives abroad (Johnson and Woon, 1997b:49). If an entire household goes abroad, properties left behind have to be maintained by someone else, usually kinsmen. This characterizes the situation in Jianglian village. Some 40 percent of the houses in the village are empty as the owners of these houses have gone abroad (Johnson and Woon, 1997a:745). Some villages in Taishan and Kaiping are almost abandoned because of mass emigration (Zhang, 2005c:206-214). In Duanfen Township, about 40,000 locals had emigrated from 1978 to 2000 (Duanfen Township Government, 2005:97).

In the 1994 survey, among 35 households with overseas connections, four had at least one member who recently emigrated under the sponsorship of their transnational relatives or family members, three went abroad by way of marriage, five households had members planning to join their relatives abroad in the near future, and another five were taking care of houses of those who were currently residing outside of China. In the 2000 survey, among 51

households with overseas connections, six had recently emigrated, two went abroad through marriage, 11 intended to join their family members abroad in the near future, and 11 households were taking care of transnationals' houses. These emigration cases are only some continuing scenarios of emigration flows that began 150 years ago.

## Summary

Due to migration policy in both the receiving and sending countries and geographical reasons, many Chinese transnationals have lived separately from their family members or relatives left behind. They strengthen their ties by meeting their commitments, loyalties, and their filial obligations to their families, lineages, or home communities by sending money to China. The remittances are used to repair houses, to build new houses, to support their dependents left behind, to defray wedding or funeral expenses, to celebrate the Chinese New Year or a new birth, to cover medical costs, to purchase an expensive electric appliance, to transfer the bones of their ancestors from one burial site to another location (in conformity with geomancy), to rebuild the ancestral halls, among other reasons<sup>96</sup>. Receiving remittances from outside of the Chinese mainland is a common phenomenon in the western wing of the Pearl River delta where there are extensive transnational connections.

In Jianglian village of Duanfen Township, Taishan, the majority of the local households have transnational ties. The closeness of transnational ties is positively associated with the likelihood of sending/receiving remittances. That is, the majority of remittances come from immediate transnational ties. During the last two decades, transnational remittance flows to Taishan have been substantial and increasing. The remittances

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<sup>96</sup> For instance, transnational remittances were widely used to build defensive buildings (*diao lou*, or watchtowers) in some parts of Guangdong, especially the Siyi, against external invasions and bandits in the period of Republic of China (Mei, 2002; Zhang, 2002).

significantly contribute to the household income. Therefore, households receiving remittances are generally much richer than those without. Remittances have expanded income inequality between remittance and non-remittance households, while also greatly widening the income gap within remittance households.

Historically, the purpose of Chinese transnational remittances was mainly for three big issues: to build a house, to marry a homeland wife, and to purchase land (Zhang, 2002:10). But this tradition lost its root as the domestic situation in China changed dramatically -- land was collectivized under the Chinese party-state. Peasants, even without remittances, prospered in the reform era, and more and more households without remittances were able to build new brick houses. The quest for brides has remained highly significant. The most important influence of transnational remittances is the fact that they improve peasant lifestyles and diversify economic strategies. Families with remittances enjoy a more elegant life by purchasing expensive appliances and spending more time on leisure pursuits and amusement than those without. Remittance households have also developed distinctive economic strategies. They rarely live in a subsistence economy or stick to paddy cash-cropping. With less and less interest in farming, many of them have abandoned agricultural activities by subletting their farmland to others or returning the land to the collective. Furthermore, a considerable proportion of them live entirely on remittances. By contrast, non-remittance households are more self-reliant. Cash-cropping is the first choice for non-remittance households if they are not engaged in non-agricultural sectors. If opportunities arise, they will develop diversified strategies often combined with small-business operation or industrial employment.

Transnational connections also create emigration chains. Chinese immigrants help their relatives in the homeland to obtain an emigration visa by means of sponsorship or marriage match-making. When emigrants leave China, they have their empty houses taken care of by their relatives or kinsmen left behind.



## **Chapter 6 “Patriotism”: Donations and Investments of Taishanese Transnationals**

The first-time visitor to Taishan will be impressed by what he/she sees -- highways and bridges, bus stations and ferries, schools, hospitals, museums and sports facilities have all been recently built. In many places in Taishan, there are common slogans such as, “Welcome to China’s No. One *Qiaoxiang*.” There is something distinctive about these infrastructures and projects – they are either named after a Chinese transnational, or marked with a plaque that declares that the project to which it is attached has been funded by Taishanese transnational donors. The many newly-built factories are, in most cases, the consequence of an investment made by a Chinese businessman from Hong Kong, Taiwan, or North America. Donations by Taishanese transnationals penetrate every public activity in Taishan -- education, health care, transportation, telecommunications, hydro, welfare, and even government facilities. If transnational remittances have tremendously changed the recipients’ daily personal lives, as discussed in the previous chapter, I shall argue that transnational donations have completely transformed the portfolio of Taishan’s public sectors. Also, the recent growth of transnational investments has gradually furthered Taishan’s economic development, especially industrialization. In this chapter, I will firstly illustrate how large amount of philanthropic donations from Taishanese transnationals has greatly improved Taishan’s infrastructure and welfare, and then examine how transnational investments have stimulated Taishan’s industrialization. Finally, I will discuss the mechanism and strategy in which transnational contributions are mobilized and eulogized in *qiaokan*.

### **Donations from Taishanese Transnationals**

Once Chinese transnationals have accumulated fortunes in their places of settlement (sometimes their birthplaces), they often consider actions that will be beneficial to their ancestral places. One of the first things they will likely consider is education. Born in or closely connected to Chinese culture ideologically dominated by Confucianism, which values education as an efficient and permanent way to achieve higher social status, and having lived in a non-Chinese context in which economic development is based on science and modern technology, Chinese transnationals begin to realize that education, or more accurately, modern education, is the fundamental remedy to pull China out of poverty and foreign domination. Thus, education has been the dominant sector in which Chinese transnationals have input their donations extensively and persistently for at least a century (Lau, 1986; Yu, 1983).

The history of Taishanese transnationals' participation in modern education in Taishan began a century ago when an American merchant of Taishan, Ng Limen, proposed to build a new school near his home village in Duanfen in 1905. He persuaded fellow overseas villagers, mostly others surnamed Ng in North America, to donate funds, managing to collect more than 100,000 silver yuan, the precious currency at that time. The school was built in a marketplace near his ancestral village and called the Chengwu School. It began to accept students both at both junior and high school levels in 1909 (Taishan CCP Head Office *et al.*, 2002:140; Taishan Overseas Chinese Affairs Office, 1992:118). The school has been operating with overseas funding for nearly a century and remains one of the three major middle schools in Duanfen. In 1987, the Chengwu School was rebuilt and extended its

commitment to secondary education with funds of \$100,000 HKD, mostly from people surnamed Ng overseas (Taishan CCP Head Office *et al.*, 2002:140).

In the same year construction of the Chengwu School was proposed, people surnamed Moy (Mei) in the US from Duanfen also began to raise funds to establish the Mengyang Elementary School in their ancestral village (Taishan Overseas Chinese Affairs Office, 1992:118). During the following five years, three other schools were successfully set up in Taishan by transnationals (Taishan Overseas Chinese Affairs Office, 1992:118). Since the 1910s, elementary, secondary, and professional schools have been built or rebuilt with overseas donations throughout Taishan. The most famous is the Taishan Middle School, rebuilt and expanded in the early 1920s with donations of \$249,596 CAD collected mainly from Taishanese in Canada. The most prominent donor, perhaps, was Yip Chun-tin (alias Yip Sang), who was the labour broker for the Canadian Pacific Railway and later one of the wealthiest merchants in Vancouver Chinese community. In the 1930s, Taishanese from the United States contributed to adding dormitories to the school. It was considered the most modernized school in terms of facilities in China at that time (Taishan Overseas Chinese Affairs Office, 1992:119)<sup>97</sup>.

The 1920s and 1930s of the Republican period witnessed a peak of school development under Taishanese transnational sponsorship. In Duanfen alone, more than a dozen of schools were founded by overseas transnationals between 1905 and 1932 (Mei, 1986:22). In 1932, Duanfen's first-ever secondary school, Duanfen Middle School, was set up by overseas Moys. Before 1949, eighty-six elementary schools and nine middle schools

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<sup>97</sup> For more information on the history of and donations to the Taishan Middle School, please refer to its website at <http://www.tsyz.net/school/xiaoyujieshe.asp> (accessed on August 11, 2006). The buildings of the schools were quite westernized in terms of structure and style. One of them was even renamed the Canada Teaching Tower and is currently still in use.

had been built and rebuilt with the help of such channels in Taishan. Nine of these schools were located in Duanfen (Taishan Overseas Chinese Affairs Office, 1992:119-127).

Although policies of the CCP government towards Chinese transnationals swung between toleration and harshness from 1949 to 1966, there had been one goal that remained central to these policies -- to attract foreign currencies from Chinese transnationals<sup>98</sup>. Apart from remittances, overseas donations to education were another focus of the policies. The state Council promulgated *Rules On Overseas Donations and School Development* in 1957, which encouraged Chinese transnationals to continuously sponsor education in China. During this period, a considerable amount of educational funds was transferred by Taishanese transnationals to China, and many *Huaqiao* schools (Overseas Chinese schools) were established under such sponsorship (Taishan Overseas Chinese Affairs Office, 1992:128 & 130). With collectivization spreading in China in the 1950s, dependents of transnationals in China were mistreated and many of their properties were confiscated (Peterson, 1986:106-110). Transnational donations, along with remittances, were severely reduced. From 1966 to 1977, donations from Chinese transnationals were almost completely cut off under the extreme (and often xenophobic) ideology of the Cultural Revolution and the strategy of self-reliance which was an important policy initiative.

Donations, along with remittances and investments, from Chinese transnationals and other foreigners did not flow freely to China until the late 1970s when China shifted its national strategy from class struggle to economic development. The Chinese government abandoned its xenophobic ideology against the West and reopened its doors to the outside world to acquire foreign capital, technology, and management skills for its modernization. After China abandoned its discriminatory and leftist policies and redressed its ill-advised

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<sup>98</sup> China's Policies on Chinese Transmigrants were discussed in Chapter 4.

actions towards transnationals, the so-called '*huaqiao*' and '*tongbao*' came back to China with renewed passion, loyalties and commitments. They began to remit and donate again, just as they had been doing before 1966. Transnational donations on Taishan's education resumed in September 1978, when a Venezuelan Taishanese donated 20,000 RMB yuan to Guanghai Middle School upon his first visit (Mei, 2005:77). Since then, transnational sponsorship and donations to local education in Taishan have gradually become significant in the region once again.

Meiwan School, opened in March 1983, was Duanfen's first school entirely founded by overseas transnationals after 1949 (Mei, 1986:24). In Jianglian village, donations from transnationals to education are prominent. The Jianglian Middle School and the Jianglian Elementary School were established in 1984 with donations of ¥407,000 RMB by businessmen, all surnamed Jiang, living in North America and Hong Kong (Duanfen Township Government, 2005:141; Mei, 1986:25). During the next two years, four more buildings donated by overseas Jiangs were set up on the campus. In May 1995, the third phase of the construction project was completed with more funding from Jiang transnationals (Wen, 1995a). The library of the Jianglian Middle School was also built with funds given by several Jiang females in the US, who immigrated from Jianglian village (Duanfen Township Government, 2005:141).

All twenty-eight elementary schools in Duanfen Township have received partial or full financial assistance from Taishanese transnationals. In ten years, Duanfen's education expanded at an astonishing pace. Apart from Duanfen Middle School, which was completely rebuilt, ten more secondary schools were newly established within the Duanfen Township with transnational funds (Duanfen Township Government, 2005:62). From 1979 to 2000,

contributions from Taishanese transnationals to education in Duanfen totalled RMB 66 million yuan (Duanfen Township Government, 2005:231). In other parts of Taishan, hundreds of schools have been built, rebuilt and expanded with financial donations from Taishanese transnationals. During the twelve years from 1978 to 1989, 75 elementary schools and 93 middle schools had been established, and 810 schools had been renovated with Taishanese transnational financial assistance. The total amount of education donations from Taishanese transnationals reached more than RMB 78 million yuan during 1978-1989 (Table 6.1). By 2004, transnational donations for education in Taishan reached \$400 million HKD (Mei, 2005:76). Some schools even cost multi-million dollars donated by Taishanese millionaires in Hong Kong (Table 6.2). For instance, Xueye Middle School, solely donated by Hong Kong tycoon S. T. Wu in the mid-1980s, accommodates 300 students, and had construction expenses that exceeded RMB 1.3 million yuan (Xiao and Wu, 1987).

In Jiangmen municipality, which administers five county-level municipalities, including Taishan, the Wuyi University and several colleges have also been established with huge transnational financial inputs. The University has received more than \$180 million HKD from transnationals<sup>99</sup> (Mei and Zhang, 2001:443).

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<sup>99</sup> More than fifty buildings of Wuyi University were set up with transnational donations, according to the website of Wuyi University at <http://www.wyu.edu.cn/newver/jianjie/xxjj.htm> (Accessed on Dec. 12, 2006). One of the buildings cost as much as 10 million yuan.

Table 6.1 Annual Taishanese Transnational  
Donations to Schools in Taishan 1978-1989

Year	Number of Schools sponsored	Amount of donations (RMB yuan)	Elementary schools built	Middle schools built	Schools rebuilt or expanded
1978	10	12,313			
1979	29	122,720			9
1980	71	516,504			38
1981	140	3,369,953	2	2	117
1982	145	3,440,272	8	8	89
1983	149	5,709,622	4	11	106
1984	198	6,732,976	13	20	74
1985	203	10,839,100	10	5	83
1986	216	15,269,100	20	9	86
1987	169	15,377,590	10	19	64
1988	227	16,26,6130	3	11	81
1989	105	16,694,500	5	8	63
Total	1,662	78,084,650	75	93	810

Source: Compiled from *Taishan xian huaqiao zhi* (Taishan Overseas Chinese Affairs Office, 1992:131) and *Taishan gujin gailan* (Huang, 1993:229).

Table 6.2 Taishanese Transnationals' Donations on Major Education Projects  
(Amount valued at more than RMB 10 million *yuan*)

Donors	Residency	Amount: RMB yuan (Million)	Major donated projects in Taishan
Dr. Wu (S. T. Wu)	Hong Kong	46	Sijiu Middle School, Taishan Professional School, Taishan Youth Palace, Malanfeng Kindergarten
Chen Pengquan, Chen Guoqiang	Hong Kong	27	Wencun Pengquan Middle School, Taishan Pengquan Middle School
Mr. Hung Pingli couple	Hong Kong	27	Taishan Formal Teaching Tow, Taishan Nursing School, Taishan Medicine School
Li Bairong	Hong Kong	16	Teaching Tow of Taishan First Kindergarten, Living Centre of Peiying Middle School, Juying Tow of Taishan Normal College
Deng Shuchun	Hong Kong	11.5	Science Centre of Kanghe Middle School, Dengshuchun Middle School
Mr. Kuangs	Hong Kong	15.5	Qiucang Middle School, Peizheng Middle School, Cuoyuan Electronic School
Hong Kong Taishan Chamber of Commerce	Hong Kong	23.5	Education Foundation, Special Education Center, Gym of First Middle School

Source: Website of Taishan Education Network at <http://www.tsedu.gov.cn/hqjz.htm#>  
(Accessed on Aug. 3, 2006).



Apart from schools, Taishanese transnational have also been involved in establishing libraries, museums, cultural centers, science centers, theatres, resident activity rooms, youth activity palaces, sports centers, and other educational and entertainment facilities in Taishan. The Taishan Youth Palace, also donated by Hong Kong tycoon S. T. Wu in 1984, cost 1.2 million yuan (Xiao and Wu, 1987). In the twenty years from 1983 to 2003, donations to Taishan from the Wu family alone exceeded RMB 100 million yuan (Cen, 2005:51). The Taishan Museum was completed in 1987 with a fund of three million HKD from Mr. Hung Bingli (Taishan CCP Head Office *et al.*, 2002:5). The Taishan Culture and Arts Center was donated by Mr. Hung Haochuan from Hong Kong (Taishan CCP Head Office *et al.*, 2002:10). The Taishan Formal College received 2.1 million yuan from Hong Kong businessman Zhu Zhengxian to build a sports center in 1988 (Taishan CCP Head Office *et al.*, 2002:25). In a poor village, it is not uncommon that an activity room, or a village center, has been recently donated by a transnational. In Duanfen's Shanmei village, American Mrs. Mei Cuirong built a cultural center in her native place (Mei and Huang, 1987). In the Duanfen Township, forty-six cultural centers have been set up with transnational sponsorships (Duanfen Township Government, 2005:99).

In addition to education, health care is another sector that Taishanese transnationals have extensively sponsored. As early as 1889, Taishanese in San Francisco collected \$15,000 USD to build a clinic in Taishan (Taishan Overseas Chinese Affairs Office, 1992:132). In the same period, several clinics were established with overseas funds as well. In 1927, nine American Taishanese established the Taihe Hospital in Doushan district, the first hospital ever in a rural area in Taishan (Mo, 1984:20). The Taishan Hospital was initiated by the Hong Kong-Taishan Chamber of Commerce with a donation of \$18,000 HKD in 1934.

Before long, its second and third branch were established by a businessmen from Hong Kong and Southeast Asia respectively (Editor of Taishan Culture and History, 1986:4). In the following decade, overseas Taishanese continuously set up new clinics in Taishan during the 1940s. During the 1950s and the Cultural Revolution, transnational donations on health care, like those on education, were interrupted.

As with the influx of donations to Taishan's education sector in the late 1980s, health care began to benefit from Taishanese donations too. Waves of transnational funds went to hospital construction sector. During the five years from 1982 to 1986, the Taishan People's Hospital had accepted more than \$12 million HKD in donations from Taishanese transnationals (Taishan Overseas Chinese Affairs Office, 1992:132-133). In 1982, a Peruvian Taishanese and twenty-two compatriots in Hong Kong donated \$12,000 HKD and \$700 USD to build a clinic building in their ancestral village in Taishan (Taishan Overseas Chinese Affairs Office, 1992:133). An American Yuen, born in Duanfen, decided to transform his ancestral mansions into the site for a small hospital during his visit in Duanfen in 1984. He then took the lead in raising funds for this hospital when he returned to the US (Editing Committee of Guangdong Gazette, 1996:327). In 1985, another hospital was erected with ¥800,000 RMB given by Taishanese transnationals. At the same time, the Taihe Hospital in the Doushan Township received transnational donations of more than six million yuan for reconstruction (Taishan Overseas Chinese Affairs Office, 1992:134). Before 1985, there was only one small hospital, the Duanfen Hospital, operating in Duanfen, of which the total properties and facilities were valued at only ¥91,000 RMB. In 1986, the local government decided to build a new hospital and launched an extensive fundraising campaign among its transnationals (See Table 6.3). Within three years, more than 1.8 million RMB was collected

from transnational individuals and associations, and the new Duanfen Hospital was set up by March 1989. One year later, another construction project in the hospital was completed. With such huge donations, modern medical equipment was also installed in the hospital (Duanfen Township Government, 2005:99 & 132). Taishanese transnational funds have also been used for medical training. Another Hong Kong tycoon, Mr. Huang, donated seven million yuan to build two medical colleges and to train doctors and nurses (Tan, 2005).

Table 6.3 Distributions of Transnational Donors for Duanfen Hospital

Residency Country	Number
USA	121
Hong Kong	114
Macao	17
Canada	5
British	5
Australia	1
Singapore	3
Brazil	5
Panama	2
Malaysia	30
Germany	1
France	1
Total	304

Source: (Steering Committee for Duanfen Hospital Construction, 1990).

From 1979-1989, a total of \$21.577 million HKD and RMB 7.62 million yuan have been donated by Taishanese transnationals to Taishan's health care. With such donations, 25 hospitals and clinics have been set up or renovated, 21 ambulances have purchased, and many other medical facilities have come into use (Taishan Overseas Chinese Affairs Office, 1992:134-144). By 2004, total transnational donations to Taishan health care have been valued at about RMB 120 million yuan (Mei, 2005:76). Sixty-nine hospitals and medical institutions spread all over Taishan have been built or rebuilt<sup>100</sup> (Table 6.5). A great deal of expensive medical equipment, such as X-ray, Ultra-sound, and cardiogram machines have been installed in rural hospitals within Taishan.

Unlike donations for school and hospital construction, which usually demands large amounts of money, village planning and transportation projects, which can be completed with smaller funds, have attracted thousands of Taishanese transnational sponsors. In the early 1980s, there was no tap water system in most rural areas in Taishan. Villagers simply went to ponds, rivers, and wells for their drinking water. There were also no paved roads connecting villages to major transportation systems in many rural areas. Bridges needed to be built over rivers for residents living on opposite banks. During the rainy season, dirt roads in villages became muddy, and transportation was cut off by flooding rivers. When transnationals were allowed to visit their ancestral villages after the reform, the unpleasant conditions and transportation difficulties, the lack of drinking water and other hygiene issues, caught their attention. Many of them begin to donate for the improvement of village living conditions.

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<sup>100</sup> Data obtained from an official document of the Taishan Foreign and Overseas Affairs Bureau.

In 1985, with transnational funds villagers at Hele Village in Duanfen were able to enjoy clean tap water and paved cement courts for rice-threshing and roads, for the first time ever in their village history (Mei and Wen, 2005:164). All village alleys in Shandi village in Duanfen were paved with cement after transnationals collected enough money (Editors of *Nei Nam's Flower*, 1988b). In Dayangmei in Jianglian village, where the three surveys were conducted, a cement road which connects the village entrance to the village center was constructed with RMB 730,000 yuan donated from three Jiang transnationals. The road was named San Gong Road (Three Gentlemen Road). The cement court in front of the village center was also completed with a donation of \$20,000 HKD from two brothers in Hong Kong<sup>101</sup>. Also in Jiujia of Jianglian village, \$12,700 HKD and \$1,560 USD were collected from thirty-one Jiangs abroad to contribute to their ancestral village planning. The village rebuilt its alleys and roads and upgraded the tap water pipes (Editors of *Nei Nam's Flower*, 1990a). In 1991, an American Moy and his son donated \$2,100 dollars to build a new bridge connecting their ancestral village to the neighbouring one (Wen, 1991b).

Taishanese transnational involvement in Taishan's village planning was not just limited to the projects mentioned above. They have also built gardens and parks of both traditional Chinese and western styles since the first half of the twentieth century (Zhang, 2005c:82-99). A small park was constructed in Duanfen's Hele village, costing \$120,000 HKD given by a Moy couple from New York, after the villages were re-planned with transnational funds (Mei and Wen, 2005:165). Transnationals from Duanfen successfully raised RMB 4.8 million yuan to build a huge park beside the town marketplace, of which different gates, kiosks, squares, and bridges were named after transnational individuals and lineage associations (Wen, 2000).

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<sup>101</sup> Data obtained in 2004 fieldwork.

By 2004, all the major roads and threshing courts of Duanfen's 315 villages had been paved with cement, and most villages have clean tap water, made possible with transnational donations (Duanfen Township Government, 2005:231). Similar things have been happening in many parts of rural Taishan as well. In twenty years, village roads of 1287 kilometers long, 129 bridges and 151 tap water projects have been carried out with Taishanese transnationals' sponsorships (Table 6.5). Local peasants now have a modern and convenient transportation system that the local government could not afford to provide<sup>102</sup>.

Transnationals' financial help has also reached the old, poor, and other marginalized groups. In 1985, an American lady Moy initiated construction of an elderly nursing house in her birth village by donating several thousands dollars (Editors of Nei Nam's Flower, 1985). The Duanfen Nursing Centre was built in September 1994 with multi-million funds from transnationals, which accommodated more than twenty elders that could not take care of themselves (Duanfen Township Government, 2005:211). In 2003, transnationals who originated from Duanfen's Sanhua villages raised RMB 320,000 yuan to buy an abandoned police station building. The building was successfully transformed into a nursing house for indigent old villagers (Editors of Nei Nam's Flower, 2003b:27). A typhoon in 2003 struck Taishan destroying many houses. Together, eight businessmen who invested in Duanfen gave RMB 160,000 yuan to help the victims of the disaster (Editors of Nei Nam's Flower, 2003a). During Chinese festivals, many transnationals visit elders in the villages with gifts and red envelopes usually containing 50 or 100 yuan in cash<sup>103</sup> (Mei and Wen, 2005:174).

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<sup>102</sup> A brief review of the history of Taishan's modern transportation illustrates that Taishanese transnationals have greatly contributed to Taishan's transportation construction. A good example is Chen Yixi (1844-1928), who ambitiously built a railway between Jiangmen, Taishan and several towns in Taishan (Hsu, 2000a).

<sup>103</sup> A red envelope or red packet (*lai si* or *lai see* in Cantonese) is a monetary gift which is given in Chinese society. It is often presented by adults to children or elders on social and family occasions such as wedding receptions, festivals such as Chinese New Year, or any other special occasions. The red colour of the packet symbolizes good luck and the amount of money in the packet is often a lucky number.

Governments at local levels also received transnational donations for their own uses. In many villages, the village centres, usually combined with the Village Cultural (or Activity) Centre and the office of the Village Committee, are built by transnational funds. The administration building in Jianglian village, completed in 1995, cost more than RMB 120,000 yuan from Jianglian transnationals. Thus, the building was named Qiaozheng Lou (Huaqiao and Government Building) (Wen, 1995b:5). In the same year, the Duanfen Government also finished its new administration building complex. Although there has been no detailed information showing how many transnational donations were given to support such a huge project, it is obvious that a considerable amount of money from transnational contributions went towards its completion. The Entrance Gate of the government compound alone, cost more than ¥100,000 RMB and was donated by a Hong Kong entrepreneur who owned a textile factory in Duanfen (Editors of Nei Nam's Flower, 1995). Inside the buildings, much of the equipment and facilities were purchased with transnational funds. In my several visits to the Township government, I observed the many names of transnational donors painted on the air conditioners, TVs, electronic fans, cabinets, desks, sofas, water-boilers, mirrors, etc – a typical way to acknowledge donations. A Moy couple bought a seven-seat van for township government use in 1999 (Editors of Nei Nam's Flower, 1999).

Illustrated above are only some of many on-going scenarios of transnational donations in Duanfen Township and Taishan. From 1978 to 2000, Taishanese transnationals have made donations totalling more than RMB¥ 101 million yuan to the Duanfen Township, of which 66 million yuan has been spent on education and 35 million on health care, transportation, culture, rural planning and other sectors (Duanfen Township Government, 2005:99). Other townships in Taishan have experienced a similar influx of transnational

donations. From 1978 to 2003, 17,370 cases of transnational donations were made for a total value of 1.224 billion RMB (Table 6.4 & Table 6.5). A comparison of annual donation sums against total revenues of Taishan will reveal the importance of transnational donations (See Appendix 5 for Taishan's annual revenues). In 1987, transnational donations to Taishan equaled nearly 80 percent of Taishan's total revenues. The ratio in 1991 was 43.5 percent.

In Jiangmen area, transnational donations reached almost every public sector. By the end of 2004, donations from overseas, Hong Kong, Macao, and Taiwan to Jiangmen Municipality has reached more than \$4.9 billion dollars HKD, of which two billion dollars have been devoted to educational, cultural and academic sectors, 0.67 billion have been endowed to health care, 1.03 has been given to other social welfare projects, and 0.5 billion have been granted to transportation. With such extensive sponsorships, 2,785 schools and 472 daycare centres have been benefited, 399 new hospitals have been set up, 406 nursing houses have been built, 217 libraries and theatres have been added, and 939 bridges and 364 hydro projects have been completed (Zhang, 2005b). The portfolio of Jiangmen's public sectors has been fundamentally changed by such extensive transnational financial inputs. It has the best schools, hospital, libraries, theatres, nursing houses, etc. in terms of facilities that most parts of rural China lack.



Table 6.4 Annual Taishanese Transnational Donations, 1978-2003

Year	Donation Cases	Amount of Donations (RMB Million yuan)
1978	160	0.15
1979	951	6.5559
1980	2849	11.05
1981	3574	30.04
1982	636	23.10
1983	891	36.74
1984	1763	74.8453
1985	870	77.91305
1986	239	47.002
1987	463	60.1782
1988	441	86.6932
1989	315	45.3346
1990	252	56.1732
1991	332	60.13276
1992	429	73.5326
1993	512	76.3629
1994	413	63.2576
1995	432	72.5126
1996	391	67.6517
1997	405	68.7326
1998	203	37.5968
1999	189	30.568
2000	156	26.03
2001	165	27.04
2002	172	33.18
2003	167	31.76
Total	17370	1224.13301

Source: Data Compiled from the documents provided by the Taishan Foreign and Overseas Affairs Bureau.

Table 6.5 Statistics of Taishanese Transnational Donations on Public Sectors 1978-2003

<b>Contents of Public Sectors</b>	<b>Number of Projects</b>
Schools built, upgraded, and expanded	719
Hospitals built, upgraded, and expanded	69
Nursing centers for the elderly, daycares, and Kindergartens built	184
Libraries, museums, theaters, cultural centers, etc. built	299
Bridges built	129
Length of roads and freeways built	1287 (km)
Drinking water projects	151
Irrigating and hydroelectric projects	250
Foundations established	238
Overseas hotels and activity centers built	20
Other sectors	580

Source: Data compiled from Official documents of Taishan Foreign and Overseas Affairs Bureau.

## **Investments from Transnationals**

With increasing volumes of remittances and donations from Taishanese in the early 1900s, the macro-structure of local economy, which was overwhelmingly dominated by traditional agriculture, did not fundamentally change. Some Taishanese who were successful and wealthy businessmen abroad realized this problem, and tried to introduce western industry by setting up enterprises and factories in economically moribund Taishan. By doing so, they were hoping that modern technology and industry could simulate the local economy.

Modern industry began to appear in the impoverished region at the turn of twentieth century. In 1899, an American surnamed Yip opened a coalmine in his home village in Taishan. In the same year, another Taishanese American established an electricity generation firm in Guangzhou. In 1908, a Taishanese businessman from Japan managed to raise \$126,600 HKD and opened the Jiangmen Paper Factory. Two years later, another Taishanese American established a clothing factory in Taicheng. In the following decades, several power stations and engineering factories were set up and operated by transnational Taishanese businessmen in Taishan (Taishan Overseas Chinese Affairs Office, 1992:155).

Probably the most influential and well-honored transnational Taishanese entrepreneur was Chen Yixi (1844-1929), a master of commerce and transportation industry, whose modernization dream had greatly changed Taishan's transportation landscape and sped up its economic integration with the larger part of the Pearl River delta (Hsu, 2000a:175; Mo, 1986; Taishan Overseas Chinese Affairs Office, 1992:144-151). Chen was born into a poor peasant family and went to the United States in 1862 when he was an adventurous teenager. He became a powerful labor contractor, a railroad engineer, and wealthy owner of an import-export business, and a well-recognized leader the Chinese community in Seattle. In 1904,

Chen Yixi started an ambitious project in his native county – to build a railway in Taishan by raising capital overseas. In the following two decades, he dedicated all his fortunes, technical expertise, influences and energies to constructing the Xinning Railroad, which linked Taishan and Jiangmen, as well as two small towns in Taishan (one was his native place). The completion of the three phases of the railway was a miracle at that time in China, since it was constructed with private capital and was managed privately in a politically and geographically marginal region during a socially unstable era. In addition, Chen had another ambitious plan to develop a seaport in southern Taishan.

With the worldwide economic depression spreading in the later 1920s and constant political turmoil in China, particularly the Japanese invasion, investments of transnationals in Taishan gradually died out. Most of the enterprises run by Taishanese transnationals in the region ended up in failure or closure. Chen Yixi's railroad was dismantled by the Republican Government in 1939 as a passive defensive measure against the Japanese occupation of the central Pearl River delta, and was never rebuilt. In the following four decades, transnational investment, due to political reasons, became scarce in Taishan.

When China reopened its door to the western world, transnational investments, following remittances and donations, reentered China. In the early 1980s there were only two manufacturing factories in Duanfen, both owned by the Township Government (Duanfen Township Government, 2005:73). The first industrial project using Taishanese transnational investment appeared in Duanfen in 1983. It was a knitting factory owned by a businessman surnamed Liang who had migrated from Duanfen to Hong Kong. In 2003, the factory was expanded and moved to the Longshan Industrial Park, the special zone designed by the Township Government for industrial development. By 1989, there was a total of six

enterprises invested and owned by foreigners in the Duanfen Township: one knitting factory, two clothing factories, one restaurant, one printing factory, and one an estate developer (Editors of Nei Nam's Flower, 1989). All the owners were from Hong Kong and had ancestral relationships with Duanfen. In 1991, another Hong Kong businessman, who also originated from Duanfen, opened another small clothing factory in Duanfen (Wen, 1991a:17).

In general, Taishanese investments in Duanfen were less significant during the 1980s and early 1990s, in comparison with the scale of capital flows and number of projects funded by Taishanese donations. Also, its industrial development was much slower than other parts of the Pearl River delta. In the mid-1990s, the local authorities realized this problem and began to sketch a blueprint that was expected to increase economic transformation. In this plan, priority was given to industrialization, and great efforts, such as improving transportation and power systems and land recruitment, were made by the government to attract more industrial investments from Taishan transnationals. In 1999, Duanfen set up the Longshan Industrial Park. After seven years, the park has already attracted more than 20 manufacturing projects of foreign direct investments (FDIs) of \$60 million USD and domestic investments of RMB 120 million yuan (Duanfen Township Government, 2005:76). Among the nine manufacturing plants, each of which cost more than ¥10 RMB million of capital input, one was a construction material factory invested by an American Taishanese, one stone manufactory was owned by a Canadian Taishanese, and two factories were owned by Hong Kong Taishanese. Others were invested in by businessmen from either Hong Kong or Taiwan, who are not of Taishanese origin (Editors of Nei Nam's Flower, 2004:B & C). Four years later, another industrial zone, the Fengshan Industrial Park was opened. It

accommodated three manufacturing factories, two of which were invested in by Hong Kong businessmen that are not of Taishan origin (Duanfen Township Government, 2005:76).

There are also other small-scale investments from Taishanese in Duanfen. Two Moy brothers from Hong Kong opened a small electronic manufactory, and another Moy business man operated three small factories near his home village (Duanfen Township Government, 2005:100). With increasing numbers of transnational investments in the manufacturing sector, Duanfen industrial output began to rapidly increase in the 1990s. In 1979, the gross industrial production of Duanfen was 3.4 million RMB. It increased to 9.35 million yuan ten years later. By 2000, the gross industrial production reached 332 million yuan, almost 98 times of that twenty years ago (Duanfen Township Government, 2005:73). Aside from Taicheng, Duanfen is now one of the several important townships that have established industrial parks. Yet, it is interesting to observe that all the FDIs in Duanfen are from businessmen of Chinese origin, including Taishanese transnationals. So far, there has been no FDI from an individual of non-Chinese origin.

Taishan's industrial development from its transnationals has experienced a similar trajectory to that in Duanfen. That is, transnational involvement in the local industry had been slow before the mid-1990s, and surged afterwards. Between 1979 and 1985, there had been 70 Sino-foreign joint-investment and joint-operation projects in Taishan (Editing Committee of Taishan Gazette, 1993, 1995:366). From 1979 to 1999, more than 800 FDI enterprises had been established, totalling \$1 billion US dollars in investments, and for which taxes accounted for about 50 percent of Taishan's total annual revenues (Mei, 2005:80). So far, sixteen industry and development zones have been opened in Taishan<sup>104</sup>, including the

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<sup>104</sup> Taishan Economy and Trade website at <http://www.gdts.gov.cn/List.Asp?ClassID=4&NClassID=1> (Accessed on December 31<sup>st</sup>, 2006)

two industrial parks in Duanfen, which are designed to recruit investments in industry and high-tech projects.

About half of the total number of FDI enterprises have been invested in by Taishanese transnationals (Mei, 2005:80). Taishanese transnational businessmen have been involved in industrial sectors such as textiles, construction materials, electronics and appliances, mechanical manufacturing, real estate, and tourism in Taishan. Some of them have invested multiple millions of dollars. For instance, in 1993, an American Ma invested \$5 million US dollars in an electronic factory in Taicheng (Liu, 2004). A Taishanese Chan from the US operates a clothing factory, which is valued at \$50 million USD. A Canadian Taishanese runs a glass company in Taishan, of which the property values are more than RMB 200 million yuan. A transnational from Australia invested in a large aluminum factory. Investments from a Lee tycoon of Hong Kong have exceeded 200 million dollars. Another Hong Kong Taishanese runs a twenty-two-storey hotel and a shopping mall in Taicheng (Mei, 2005:81). A Taiwanese businessman originating from Taishan established an electronics factory in his ancestral township in 1989. Gradually more businessmen from Taiwan followed him and invested in Taishan. By 2003, there were 128 enterprises owned by Taiwanese (Mei, 2005:80).

There are also some Taishanese transnationals who invest in agricultural and fishing sectors by operating orchards and fishponds. In 1983, an American Taishanese returned to his ancestral village and invested in agriculture. Later, he expanded his investments to a tea farm, a fruit farm, and fish ponds (Mei, 2005:66). A Hong Kong Taishanese contracted a fruit farm in his home village in 1984. In the same year, five transnationals from Chixi Township established a joint aquaculture company to raise fish and shrimps. One year later,

another Taishanese invested in an orchard (Taishan Overseas Chinese Affairs Office, 1992). During the ten years from 1979 to 1989, Taishanese transnationals had invested in 99 farms in Taishan and operated 155 *mu* of agricultural land (Mei, 2005:66). By 1995, the numbers of agricultural and forestry farms and fishing ponds invested by transnationals in Taishan increased to 180 (Mei, 2005:67).

The ratio of transnational shares among FDIs in other parts of the western Pearl River delta is even higher. For instance, it has been reported that in the Jiangmen area there were 15,322 FDI enterprises by 1998, the majority of which were owned by transmigrants, especially those from Hong Kong and Macao. These enterprises employed about 244,000 workers and contributed total revenues of RMB 0.9 billion yuan (Mei and Zhang, 2001:444). According to the media reports, \$44 billion USD of foreign capital had been invested in China between 1979 and 1993. Capital from entrepreneurs originating from China, as a whole, had contributed 80 percent (Venkataraman, 1998:178).

### **Practice of patriotism**

What permeates the whole process of Taishanese donations, investments, and, to a lesser degree, remittances is something consistent and pivotal – the advocacy and practice of so-called “patriotism.” Patriotism, a reciprocal pattern that is well accepted by the local residents, authorities in Taishan and Taishanese transmigrants, refers to the loyalties, sentiments, and commitments to one’s ancestral place, symbolized by visible financial contributions from transnationals. The community of the sending place, by accepting transnational donations and investments, becomes developed and extends and strengthens its “boundaries” beyond the Chinese mainland. The transmigrants, by donating, investing and



remitting, get involved in their ancestral community, and receive recognition for their generosity. The donors, investors, and, to a lesser degree, remitters, are labelled “*aiguo huaqiao*,” or patriotic Chinese sojourners. Hence, patriotism is the main force operating behind financial transfers beyond borders. It acts as an invisible cohesive that holds the sending places and their transmigrants together over space.

Before the 1950s, both the Republican and CCP governments had made various efforts (Lin, 1999; Peterson, 1986:132-133; Xia, 1992:95-128), through either placatory or coercive means, to target transnational remittances as an efficient measure to increase national “hard currency” reserves and to balance international trade deficiency. After 1978, the government switched its focus from exploiting remittances to attracting transnational donations<sup>105</sup>. Since the 1990s, persuading transnational investments has been added to the top of the local government’s agenda for macro-economic transformation.

It is particularly interesting to see how patriotism is advocated and activated by the local authorities and in the local magazines and journals mainly published for transnational readers in terms of lobbying for transnational donations and investments. It is observed that local officials have a well-established strategy when interacting with transnationals for potential contributions,— inviting in (*qing jin lai*) and reaching out (*zou chu qu*) (Cheng and Ngok, 1999:134-136). By inviting in, local authorities invite transnational delegations or individuals to visit their ancestral places, families and relatives, to get in touch with their roots, to engage in tourist activities, and to establish business ties. By reaching out, local governments often dispatch official delegations to visit transnationals in their resident

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<sup>105</sup> It is not to say that the Chinese government has not paid attention to foreign remittances since 1978. It still has a series of policies to regulate remittance flows (see Chapter 4). Compared with its efforts to appreciate remittances in the 1950s or block them during the Cultural Revolution, the current policy towards remittances resembles a *laissez-faire* approach.

countries to introduce the new development plans of their hometowns and to persuade them to participate. This strategy has worked well in many *qiaoxiang* of Guangdong and Fujian provinces.

This approach has also been quite successful in Duanfen. Many times, the top leaders the Township Government have invited expatriate Taishanese to visit Duanfen for special occasions, such as traditional festivals or celebrating ceremonies, while also visiting them in the United States, Canada, Hong Kong and other regions (Duanfen Township Government, 2005:20). For instance, to encourage a Hong Kong businessman to establish a factory in Duanfen, officials have travelled to Hong Kong over twenty times to meet him, and have invited him to visit Duanfen several times (Duanfen Township Government, 2005:74). The government also has frequent contacts with overseas lineage associations. For instance, in July 1988, the Duanfen Township Government invited seventy-nine leaders of Moy associations and other individuals abroad for a series of sightseeing and networking activities (Editors of *Nei Nam's Flower*, 1988c). It is standard procedure that, during their visits, transnationals are accompanied by the top leaders everywhere they go and greeted with mass ceremonies and official banquets, and arranged to meet with different people. The main theme in these activities is that transnationals are considered members of the sending community and are eagerly welcome to participate in its domestic issues.

When a donation or investment project is decided upon (even a project as small as a village gate or a building donated by transnationals), an opening or celebrating ceremony is usually held. Banners, balloons, flowers, fireworks, lion dancing, and red-ribbon cutting are parts of the repertoire of celebration. The donors or investors are invited to be present at the ceremony and are the focus of the entire ceremony. They are usually presented with

certificates, trophies, or other souvenirs by local authorities to praise them for their patriotic contributions. The donors are labelled patriotic philanthropists, and investors as patriotic entrepreneurs. Buildings or projects are often named after the donors or given a name of their choosing. Plaques displaying the donors' names, amount of money donated and other information are placed on the footstone of the buildings or projects. Commemoration methods are sometimes hierarchized according to the donation amount. Those who donate different amounts of money are commemorated with different sized plaques. For instance, Table 6.6 shows the different ways donors were commemorated depending on the amount of money they donated towards the construction of Duanfen Hospital. Similar ways are also common in other public sectors in Taishan.

Schools and hospitals sponsored by compatriots often appoint the donors as consultants or even board members. Other prestigious titles are awarded by the local authorities to major donors and investors. As mentioned in the beginning of this dissertation, at the celebrating ceremony held in Duanfen on December 28<sup>th</sup>, 2004, nine Taishanese transnationals whose donations reached one million yuan (or 1.5 million yuan for one couple) were given the "Award for Public Sector Contributions," and sixteen entrepreneurs were granted the "Award for Economic Contributions" (Editors of *Nei Nam's Flower*, 2004). So far, the Taishan Municipal Government has given 155 Taishanese compatriots "Taishan Honourable Citizenship," and presented 166 compatriots with the "Special Contribution Award" and seven Taishanese associations with the "Revitalizing Taishan Award" (Mei, 2005:78). In Jiangmen, 284 transnationals have been awarded "Jiangmen Honourable Citizenship," all of whom have made multi-millions of donations or investments (Mei and Zhang, 2001:441).

Table 6.6 Commemoration Categories in Duanfen Hospital Buildings

Donations Category (RMB yuan)	Commemoration Category
150,000 or over	Donor's photo on a porcelain plaque of 8- <i>cun</i> size, one teaching building named after the donor
100,000 or over	Donor's photo on a porcelain plaque of 8- <i>cun</i> size, two classrooms named after the donor
50,000 or over	Donor's photo on a porcelain plaque of 8- <i>cun</i> size, one classroom named after the donor
10,000 or over	Donor's photo on a porcelain plaque of 6- <i>cun</i> size
1000 or over	Donor's photo on a porcelain plaque of 4- <i>cun</i> size
10 or over	Name listed in acknowledgements

Source: *Duanfen Hospital Funding Raising Letter* (Duanfen Hospital Construction Steering Committee, 1986).

The advocacy of patriotism can be easily observed from *Qiaokan*, magazines, journals, and newsletters written and published locally in China and distributed internationally. Their major readers are those who originated from the areas or communities where the *qiaokan* are published<sup>106</sup>. *Qiaokan* have played an important role in maintaining

<sup>106</sup> For instance, *Jianglian Xiangyin* (Jianglian Hometown Message) is published by the Jianglian Village Committee and sent to overseas Jiangs. *Ruinan zhihua* (Neinam's Flower) is published by the Duanfen Overseas Association and distributed to transnationals originating from Duanfen. *Xinning Zazhi* (Xinning Magazine), China's first qiaokan (started in 1909), is published in Taishan and circulated among Taishanese transnationals.

ties between the sending places and their transnationals, nurturing loyalties and lobbying for financial support from transnationals (Hsu, 2000a:150-154, 2000b; Yu, 2004). It is reported that in 1998, eighty-six different *qiaokan* were published in the Wuyi area and circulated to more than sixty countries/areas (Mei, 1998:1). In Taishan alone, thirty-five magazines, journals and newsletters were published and sent aboard (Guo and Zhan, 1998:5-39). The most famous one is *Xinning Zazhi* (Xinning Magazine), China's first *qiaokan*, which has been in publication since 1909, circulating among Taishanese around the world. In Duanfen, there are currently two *qiaokan*. One is *Runan zhihua* (Neinam's Flower), which started in 1931 and is now Duanfen Town's pseudo-official publication for transnationals<sup>107</sup>. The other is *Jianglian Xiangyin* (Jianglian Hometown Message), initiated in 1982, in Jianglian village and acts as the newsletter of the Jiang Lineage.

A brief content analysis of *Qiaokan* will reveal how Taishanese compatriots are portrayed as patriotic. In each issue of *Qiaokan*, contents can usually be divided into three broad categories – new developments (especially completion of recent donation or investment projects) in Taishan, biographies of Taishanese compatriots, and donation acknowledgements. For instance, in Issue 22 of *Runan zhihua* (Neinam's Flower) (Editors of Nei Nam's Flower, 1988a), there are five reports on the beginning of construction of Duanfen Hospital which was funded by transnational donations. There are also three poems eulogizing the event. There are twenty-seven reports on transnationals' donation/investment cases (or their biographies) and their visits to Taishan. In these reports, a range of common words are used to describe the compatriots – hardworking, successful, rich, generous, caring, sharing, selfless, nostalgia, responsible, virtue, identifies with their hometown, mild but strong in

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<sup>107</sup> *Runan zhihua* has its own editing committee, but the Chief Editor of *Runan zhihua* is the director of the OCC of Duanfen Township Government, and most of the editors are the staff of Duanfen OCC.

personality, etc. Their family or emigration history is often mixed in these reports. In the final part of the magazine, there are a number of acknowledgements for transnational donations. Here, the donors' names and amount of money are listed. In Issue 2 of *Xinning Zazhi* (Xinning Magazine), there are nineteen articles about new events in Taishan, six biographical accounts of famous Taishanese donors or businessmen, and five reports of recently donated projects (Editors of Xinning Magazine, 2004).

The *Qiaokan* even work to garner transnational financial support for themselves. Research on the acknowledgement list of each issue of the *Xinning Magazine* will illustrate how extensive this regional magazine is financially supported by transnationals and how these patrons are honoured. For instance, a whole page in the second issue of 2006 listed and acknowledged all those that had financially contributed to the magazine since its previous issue. There were eleven lineage or regional associations and 147 individuals or couples who donated to the *Xinning Magazine* during this period (Editor of Xinning Magazine, 2006). The order of the donors was arranged according to the amount of donations from highest to lowest. One couple who donated RMB 100,000 yuan had their names printed in bold red under the headline. Another example is the *Meihua Yue Bao* (Plum Blossom Monthly), a small newspaper published in Taishan and circulated mainly among Moy transnationals. On the first page of every issue, donor names and the amount of money given are acknowledged. For instance, in Issue Two of 2005, those who donated more than RMB 300 yuan had an ID-sized colour photo of themselves printed on the first page (Meihua Yuebao, 2005). In the top right corner column, was a list of some fulsome and special titles awarded by the editors and donation requirements (Table 6.7).

Table 6.7 Honourable Titles Awarded by *Meihua Yue Bao*

Honourable Title	Donation Requirement (RMB: yuan)	Number of Individuals Awarded
Premier Permanent	20,000 yuan and encouraging	2
Honourable Chair	others to donate	
Super-Ranked Permanent	20,000	2
Honourable Chair		
Special-Ranked Permanent	10,000	12
Honourable Chair		
High- Ranked Permanent	6,000	12
Honourable Chair		
Permanent Honourable Chair	3000	13
Honourable Chair	300	55

Source: *Meihua Yuabao*, Issue 2, 2005, Page 1.

No matter what the publication, *Xinning Magazine*, *Meihua Yuebao*, or other *qiaokan*, the message that has been sent for almost one century has remained consistently clear – it is honourable and prestigious for transnationals to remit, donate and invest in Taishan. Moreover, they are expected to do so. All the remitters, donors and investors are portrayed as *aiguo huaqiao* (patriotic overseas Chinese) and should be exalted both domestically and internationally.

## **Chapter 7 Discussion and Conclusion:**

### **A Transnational Development Pattern**

#### **Remittances, Donations, and Investments: A Transnational Development Pattern**

This dissertation fills gaps in the literature on the joint or synergic effects of monetary transfers of transnational Chinese on the sending point of migration. Remittance flows from transnational Chinese to their ancestral places in China have been largely neglected. I focus, in particular, on Taishan, the historical point of Chinese migration to North America. It is my broad argument that the combined impact of these financial inflows, together with those of donations and investments from Taishanese transnationals directed towards the transformation of Taishan since 1978, has been vastly underestimated. An intense sentiment underlying a complicated mixture of an enduring affinity with ancestral places, social prestige, and inherited cultural ideology, has brought enormous benefits to relatives and ancestral homes which transnational Taishanese left behind upon migration. Utilizing both quantitative and qualitative data, I have found that the influences of Taishanese transnationals have been pervasive and significant at the household, community and regional levels during the reform era. It is the continuous flows of transnational remittances, donations, and investments that make Taishan and its adjacent regions (the Siyi area) in the western part of the Pearl River delta unique in the process of social and economic development in post-Mao era in China.

Due to a long history of emigration and a large number of Taishanese émigrés in the world, local residents in Taishan have extensive connections abroad. As a result of chain migration, population out-flows from Taishan have been continuous during recent decades.



In the village that I surveyed in Taishan, the majority of households have family members or relatives living outside of the Chinese mainland. It is common for them to receive remittances from such ties, although these remittances vary in amount. Most of the remitters have immediate relationships with the recipients in terms of blood or marriage. During the last two decades, transnational remittances to Taishan have been large and have increased over time. For many recipient households, such external financial supports are a major source of income, and there are a considerable number of households which depend completely on these remittances. Remittances significantly contribute to household income, and households which receive remittances are generally wealthier than those which do not. The income gap between the remittance and the non-remittance households has widened over the recent decades. Income inequality has also increased within remittance households as remittances among the receiving households range widely. Dependents who rely on remittances as their only source of income have become more economically vulnerable, given this financial source becomes inadequate to meet their daily needs. Remittances also result in distinct consumption styles and economic strategies. The haves, with external financial support, enjoy a more elegant life in purchasing expensive appliances and spending more time on leisure pursuits and amusement than the have-nots. They are reluctant to engage in farming and are less involved in other economic activities as well. In comparison, non-remittance households have to be economically self-reliant by engaging in agricultural production or seeking jobs outside of agriculture.

Taishanese transnationals not only help their family members and relatives left behind by remitting, but also show their loyalties and commitments to their ancestral places by donating in great volumes. Historically, donations have been pivotal for the local residents

when revolutions, wars, and natural disasters occurred, and when major public projects were scheduled. After 1978, when China reintegrated itself into the world, transnational donations to local education have been especially crucial. In villages, townships and municipalities, hundreds of schools and daycare centres have been built, repaired, or upgraded with continuous large transnational donations. From 1979 to 2000, contributions from Taishanese transnationals to education in Duanfen Township totaled RMB 66 million yuan (Duanfen Township Government, 2005:231). By 2004, transnational donations on Taishan's education reached \$400 million dollars HKD (Mei, 2005:76). Aside from schools, Taishanese transnational have also been involved in establishing libraries, museums, cultural centers, science centers, theatres, resident activity rooms, youth activity places, gyms, and other educational and entertainment facilities in Taishan. With enormous financial support from transnationals, education, culture, and sports in Taishan has been completely changed as the facilities in these sectors have been greatly modernized.

Apart from education, health care is another sector that Taishanese transnationals have extensively sponsored. By 2004, donations totalling RMB 120 million yuan have been made by transnationals to the Taishan health care sector (Mei, 2005:76). With such donations, sixty-nine hospitals, clinics, medical training centers, and other medical institutions all over Taishan have been built or rebuilt. Twenty-one ambulances have purchased. A great deal of expensive medical equipment, which was rare in rural areas before 1979, has been installed in rural hospitals within Taishan. At the same time, numerous donations have gone towards rural planning to build village roads, lanes, bridges, and parks. Measures for clean drinking water and power networks have been established, and agricultural irrigation and flood control systems have also been upgraded. Taishan's welfare sector has also benefited from

transnational support as a number of long-term care facilities have been set up. Last, but not least, even the local governments have accepted transnational donations for their new buildings and office facilities.

From 1978 to 2003, in Taishan there have been 17,370 cases of transnational donations, valuing at a total of ¥1.224 RMB billion yuan. Similar phenomena have also been reported in Jiangmen Municipality. With extensive transnational donations, 2,785 schools and 472 daycare centres have received financial assistance, 399 hospitals and 406 nursing houses have been built, 217 libraries and theatres have been added, and 939 bridges and 364 hydro projects have been completed (Zhang, 2005b).

Like remittances and donations, transnational investments in Taishan, which started a century ago, were compromised in the first thirty years after 1949, but became significant once again in China in the early 1980s. Businessmen who originated in Taishan and lived in Hong Kong, the so-called *tongbao* entrepreneurs, were the first group opening factories and investing in service sectors in Taishan. However, the investment volumes and the number of these enterprises were small in the early period. During the 1980s, only a few enterprises were operating in Duanfen. Thus, their influence on the process of Taishan's economic transformation was limited in comparison to the pervasive effects of transnational remittances and donations. In the mid-1990s the local authorities in Taishan realized that Taishan's industrial development lagged far behind other parts of the Pearl River delta and began to draw up a series of measures aimed to stimulate its industrialization. These measures included granting FDI projects privileges on rentals, hydro, taxation and land acquisition. As a result, infrastructure, including transportation and communications systems, and water and power lines, have been improved and sixteen industry and development parks

have been opened within Taishan. Taishan's industrial landscape therefore has been fundamentally changed. Between 1979 and 1985, there were 70 Sino-foreign joint-investment and joint-operation projects in Taishan (Editing Committee of Taishan Gazette, 1993, 1995:366). During the first two decades after the reform, more than 800 FDI enterprises had been established in Taishan. The total investments reached \$1 billion US dollars, and taxes accounted for about 50 percent of Taishan's total annual revenues (Mei, 2005:80). About half of the total number of FDI enterprises were Taishanese transnationals investments (Mei, 2005:80). The majority of the investments came from Hong Kong and Taiwan, with some coming from North America. Taishanese transnational businessmen have been involved in a number of industries such as textiles, construction materials, electronics and appliances, machinery manufacturing, agriculture, fishing, real estate, and tourism. Such investments have effectively brought in managerial skills and technology, introduced capitalist entrepreneurial spirit, boosted export-orientation trade, and driven up industrialization in the local region.

Social and economic transformation in Taishan and the west wing of the Pearl River delta during the reform era have had some distinct characteristics – the tremendous influence of transmigrants' participation in form of remittances, donations and emerging investments have played a crucial role in the social economic transformation of the region. In the individual household economy, public sectors (education, health care, welfare, infrastructure, etc.), and regional industrialization, transnational contributions have been pivotal. Therefore, I term Taishan's developmental course, representing the western Pearl River delta, as the "transnational development pattern." By using this term, I intentionally emphasize the combining influences of those who originated from and live outside of the Chinese mainland,

as important actors in the social and economic transformation in Taishan. This model is characterized by the interacting effects of large volumes of transnational remittances and donations, which make some local residents dependent on them for subsistence and the local government dependent upon them for several public sector developments. It is also supplemented by emerging transnational investments in industry in recent years.

Historically, most Chinese went abroad in search of a better life. When they attained a certain amount of wealth, they transferred it back to China to help those left behind. The transfers usually took the form of remittances or donations. The only difference between the two forms was that the former aimed to help the individuals and the latter aimed to benefit specific groups (such as the lineages and villages) and the community. But their essential motives behind the monetary transfers were the same -- they wanted and were expected to show their loyalties, filial piety, and sentiments to the people and the community left behind. Thus, remittances and donations from transnationals often flowed together hand in hand, as transnationals have become deeply involved in domestic issues in *qiaoxiangs*, such as Taishan. Almost every transnational could show their commitments to their relatives and the place of origin by transferring a certain amount of remittances and donations, but only transnational entrepreneurs can afford to invest in their ancestral place. What has taken place in Taishan since 1978 is the continuity of this tradition by which Taishanese transnationals contribute to their ancestral place. The tradition has been reinforced by more extensive remittances and donations, and bigger volumes of industrial investments. Thus, the transnational development pattern is based on extensive remittances and donations, and supplemented by increasing investments from transnationals. It is hard to find a case in which a transnational only remits or donates if they are capable of doing both. When

transnationals become entrepreneurs, they expand their business network to incorporate their place of origin if the local conditions allow them to do so.

The transnational development pattern has geographically taken place in several *qiaoxiang*. As discussed in Chapter 2, *qiaoxiang* can be translated as the native place of those who emigrate. It essentially contains uncertain geographical boundaries, depending on how the boundaries are defined and what transnationals identify as their native place. Transnationals' participation in their *qiaoxiang* varies greatly, but only in regions such as the western wing of Pearl River delta do their influences synergize so profoundly. However, not every *qiaoxiang* undergoes the transnational development course. Historically, there have been many *qiaoxiang* in South China, yet influences of remittances and donations from their transnationals have significantly weakened. For instance, Dongguan, Zhongshan, and Panyu in the Pearl River delta, which are also famous *qiaoxiang*, historically used to receive large volumes of remittances and donations, but no longer depend on such external sources as they are undergoing dramatic industrialization and urbanization (Johnson and Woon, 1998; Williams, 2002; Yow, 2007; Yu, 1979b) during recent decades. Thus, among *qiaoxiang* transformation patterns have diversified after 1978, which has largely influenced by the factor of geographic distance to regional economic centres such Guangzhou and Hong Kong. Some *qiaoxiang*, such as Taishan, are economically marginalized and are still shaped by strengthening inertia of transnational influences, whereas some *qiaoxiang*, such Dongguan and Shenzhen (former Bao'an country), have become new economic centres, partially due to geographic advantages.

The transnational development pattern exists not only in the western Pearl River delta, represented by Taishan, but also in other coastal regions such as eastern Guangdong,

southeast Fujian, and some parts of Hainan province (Chen, 1940; Wang, 2002; Xia, 1992; Yu, 1979b; Zhang, 2006; Zheng, 2001), which are historically emigrant communities and still maintain strong transnational connections. They have continuously benefited from extensive transnational remittances and donations and, to a lesser degree, industrial investments. In these *qiaoxiang*, transnationals have played a similar role in the social economic transformation in the local regions as in Taishan.

The transnational development pattern is a heuristic device to understand the ongoing intra-regional ramifications of transformation strategies within the Pearl River delta. In the eastern and central delta, the industrialization strategy has prevailed (Johnson, 1998; Johnson and Woon, 1997a). Dongguan, a prefecture-level municipality along the eastern bank of the Pearl River mouth, is a good example of the industrialization model. It is geographically adjacent to Guangzhou, Shenzhen and Hong Kong, and is one of the major departure points for thousands of migrants to Hong Kong and Macao<sup>108</sup>. Before the reform, agriculture was its economic backbone supplemented by minor sidelines (Johnson and Johnson, 1976). Under the open policy, Dongguan has utilized the privileged policies offered by the government and its unique locational advantages in terms of geographical accessibility, local sourcing and targeting of the big market in the Chinese hinterland, low production costs, cheap labour (mostly from the hinterland), advanced infrastructure, and strong transnational connections in Hong Kong and Macao, to become one of the most industrialized and commercialized regions in China (Yeung, 2001). The agricultural economy in Dongguan has been transformed into one dominated by manufacturing and high-value added industry with exports as its major focus. FDIs have played a vital role in Dongguan's economic boom (See

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<sup>108</sup> According to the Dongguan Gazette, 180,000 overseas Chinese and 650,000 compatriots in Hong Kong and Macao have originated from Guangdong (Editing Committee of Dongguan Gazette, 1995).

major economic indicators of Dongguan in Appendices 6 and 7). Its landscape has been completely changed to a "Desakota" type (McGee, 1989, 1991), which refers to the rapid industrialization and urbanization that has taken place in long-established rural communities, forcing many local residents to abandon agricultural production and engage in industrial and commercial activities, similar to those in parts of Southeast Asia. In some degree, Dongguan and Taishan have their comparison pertaining to different policies provided by the government towards external forces and different economic orientations profoundly influenced by such forces. Their contrasting development strategies are the integrated results of both internal and external factors.

With respect to the degree of industrialization, the western part of the Pearl River delta, including Taishan, is the least developed and considered the backyard of the Hong Kong-Dongguan-Guangzhou corridor and the central part of the delta (Vogel, 1989:192-195). In 1985, Dongguan's gross industrial output was slightly more than two times that of Taishan, surging to nearly ten times in 2004. Revenue income available for the Taishan government to spend was 24 percent that of Dongguan in 1989, and shrank sharply to only five percent in 2004<sup>109</sup>. Rapid industrialization is associated with the spread of an entrepreneurial spirit in the eastern and central delta, whereas the western wing, by contrast, is an emigration-oriented region. Industrialization as a priority, heavily inputted by FDIs, has prevailed not only in the central and eastern Pearl River delta, but also in many other regions in China during the recent decades, whereas the transnational development pattern has permeated in some *qiaoxiang* for as long as over a century.

Taishan's development dynamics have been deeply embedded in its historical legacy of mass emigrations, which emerged in the second half of the 1800s, maturing during the

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<sup>109</sup> Calculated according to Appendices 5, 6, and 7.



first three decades of the 1900s and has been revived to a new height during China's reform era. The legacy is featured by continual emigrant waves, an expanding community across the boundaries<sup>110</sup>, and economic dependency of both individuals and the community upon its transmigrants. The legacy has caused an orientation among the locals, termed an "overseas Chinese mentality" by some scholars (Johnson and Woon, 1997a:745; Woon, 1990:164), which refers to the deeply embedded mental faith of emigrating, keeping connections with emigrants, receiving financial support from them and relying on such support in some degree. As the term "overseas Chinese" is inappropriate when referring those who originate in the Chinese mainland, I would propose that this orientation is better labeled as a "transnational mentality" or, more accurately, a "Taishanese transnational mentality" in the case of Taishan. As repeatedly mentioned previously, this mentality is the inertia trend of geographical determinism and social practice, which has greatly shaped and reshaped Taishan's social, economic, political, and cultural dynamics. This mentality has not faded away as the local residents in Taishan have continued to enjoy a more affluent life in China's dramatically transformed economy since 1978. In some cases, many local residents in Taishan even have a higher standard of living than those who go abroad through chain migration and end up as cheap labourers in Chinatowns. Even though these new immigrants must survive on a meager living, they usually continue to remit to China<sup>111</sup>. The transnational development pattern in Taishan is a concrete manifestation of such an enduring mentality, and in turn, reinforces it in new dimensions.

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<sup>110</sup> Hsu argues that such communities are imagined in the literature of *qiaokan* (Hsu, 2000b).

<sup>111</sup> During my fieldwork with Prof. Johnson, in several occasions officials and businessmen who had dignity life in Taishan asked us the possibility to seek appropriate channels for emigration visa. In Vancouver's Chinatown, I found illegal Taishanese immigrants working in groceries and butchers in low payment.

## **Dilemmas of Transnational Development**

As discussed previously, extensive transnational remittances and donations, as well as fledging investments in Taishan have fundamentally transformed Taishan's social and economic spheres. However, they have also caused some unexpected problems that challenge the homogeneity of the local community and impair long-term sustainable development.

As analyzed in Chapter 5, remittances as an extra income source increase the disparity between remittance and non-remittance households. They also widen the income gap among remittance households. Remittance households tend to have less incentive to engage in farming, which is a negative consequence for local agricultural production. In comparison, remittances, often spent on housing, food, entertainment, and ceremonies, stimulate local consumption and related service sectors. In Taishan, consumption and the tertiary sector have always occupied a prominent position in the macro-economic structure. In 1992, the gross value of the tertiary sector in Taishan's GDP was 31 percent; it increased to 37 percent in 2000 and to 40 percent in 2004<sup>112</sup>. Throughout history, it has been repeatedly reported that remittance dependents, or the second generation of Taishanese "gold mountain guests" (Gum-sam-haak), have exhibited deviant behaviour as they adopted an extravagant and debauched lifestyle (Mei, 1996:76; Taishan Overseas Chinese Affairs Office, 1992:257-259). With the affluence that came with remittances they exhibited little initiative in economic production and instead, many dependents readily indulged in gambling, drugs, prostitution, drinking, and other morally questionable activities.

There are also problems in the use of transnational donations. Firstly, excessive donations concentrating on several public sectors have resulted in inappropriate use and

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<sup>112</sup> Calculated according to Appendix 5.

waste. Secondly, donations often take place in the shadow of local lineages, as Taishanese transnationals tend to patronize their natal places, which are typically single lineage villages. This has caused an uneven distribution of donations. In some cases, projects funded by donations have been carried out without first systematically researching the available resources and potential challenges, resulting in an inefficient use or waste of donations. In Taishan's education sector this is particularly the case. Due to the shrinking population -- the result of China's stringent policy on population growth, as well as emigration -- some areas are now faced with a surplus of schools. Some schools established with transnational funds have been closed by the local authorities. These schools' properties have either been changed for other use or abandoned. Changes of school numbers in Duanfen Township reflect of this problem. In the beginning of the 1980s, there was only one secondary school, Duanfen Middle School in the Township. By 1993, there were ten secondary schools, all of which utilized transnational funds, operating full time in the region<sup>113</sup>. By 2004, however, only five of them remained in operation (Duanfen Township Government, 2005:101-102)<sup>114</sup>.

The requests for transnational sponsorship for these schools were sent out several years ago. Some recently built teaching facilities, which cost thousands of dollars from *huaqiao* and *tongbao*, are standing empty on the campuses. Undoubtedly, shortsighted planning was blindly carried out when these schools were constructed using transnational donations. There have been similar closures of libraries and cultural centers. Though elaborately built with transnational funds, they were seldom used by local residents.

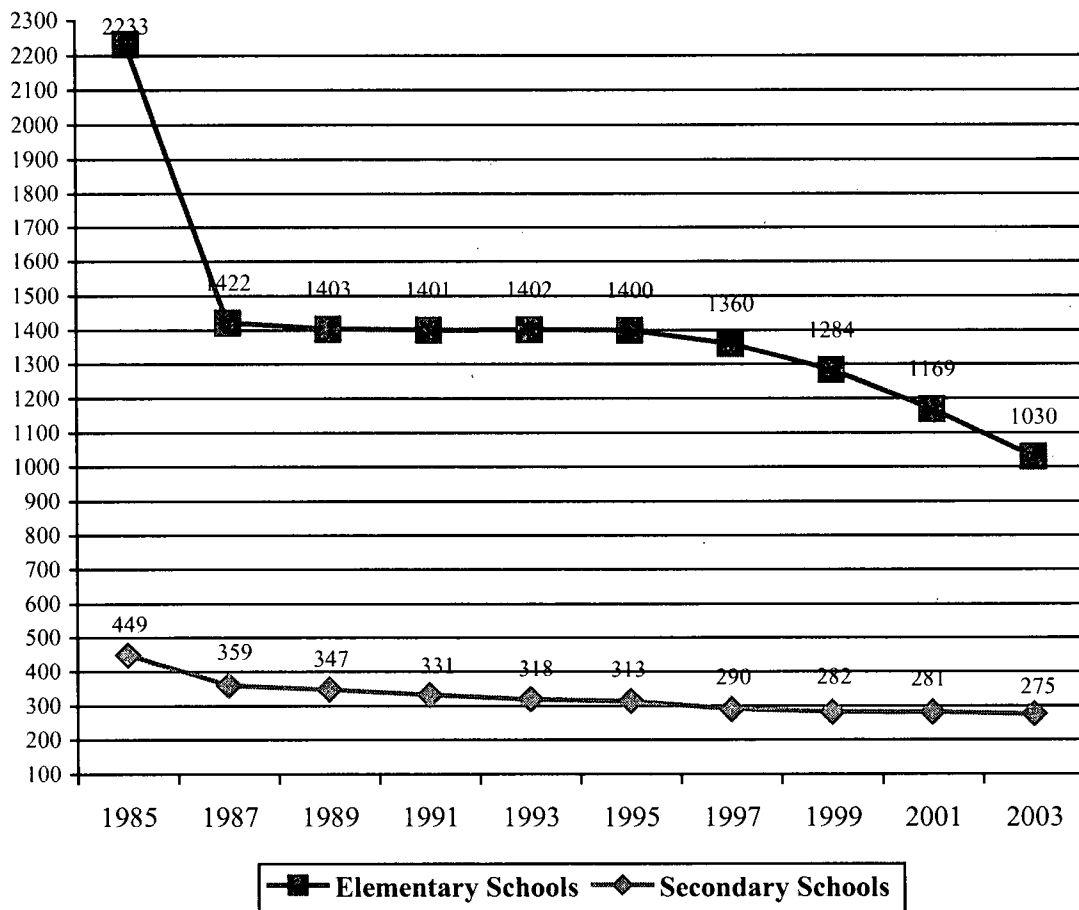
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<sup>113</sup> The ten new schools were: Haiyang Middle School, Jianglian Middle School, Tangtou Middle School, Naren Middle School, Dunzai Middle School, Shandi Middle School, Yangzheng Middle School, Chengwu Middle School, Miaobian Middle School, and Libi Middle School.

<sup>114</sup> The five closed ones were: Haiyang Middle School, Naren Middle, Shandi Middle School, Miaobian Middle School, and Libi Middle School.

This phenomenon is also quite common in the Jiangmen Municipality, as a whole. It is reported that a substantial number of transnational-donated schools, daycare centres and hospitals have been closed, merged, or abandoned. Some roads and bridges have been torn up (Zhang, 2005a). As mentioned in Chapter 6, 2,785 schools have been expanded or established with transnational donations in Jiangmen during the last two decades, whereas the total number of both elementary and secondary schools have steadily decreased since the mid-1980s. My calculation from multiple sources show that 1,203 elementary schools and 174 secondary schools have been closed or merged into other schools, as the number of elementary schools dropped from 2,233 in 1985 to 1,030 in 2003, and that of secondary schools declined from 449 to 275 during the same period (Figure 7.1). With substantial schools donated by transnationals that have been abandoned, converted for other purposes, or sold, the Jiangmen Municipality had to issued a regulation in 2006, which prohibited such actions except the conversion of the abandoned schools into other educational, cultural, and health facilities (Yang, 2006:29). Although there is no report on how much has been wasted (including transnational funds) on those closed or merged schools, it can be ascertained the amount is most likely large. These funds could have been utilized for more sustainable and permanent functions. For instances, education scholarships, funds to alleviate poverty, or renovation funds for entrepreneurship could have been established with these affluent donations. The money could have better been used for providing invisible 'software', such as skills and professional training, than putting up luxury, unnecessary buildings. When donations projects are completed, continuous efforts should be made by both the local authorities and transnationals to maintain and improve the operation of these projects.

Figure 7.1 Numbers of Elementary and Secondary Schools in Jiangmen by Selected Year



Source: Compiled varied data from Guangdong Statistical Yearbook (Guangdong Provincial Bureau of Statistics, 1986, 1988, 1990, 1992, 1994, 1996, 1998, 2000, 2002, 2004).

Another issue is that transnational donations are always associated with lineage organizations. Participation of Taishanese transnationals in Taishan has stimulated local lineage revival in the reform era (Chiu, 1995:111-115; Johnson and Woon, 1997b:52-53). Through the help of overseas lineage associations, local lineal activities have been restored. Large lineage funds have been transferred to build or rebuild ancestral halls, cemeteries, and

other memorial buildings. A typical example is the Moys (Meis) in Duanfen. As the Moys dominate the population of Duanfen<sup>115</sup> and have a large expatriate population in North America and Hong Kong, the Moy Lineage Associations are active and influential in both internal and external affairs. There are fourteen Moy Associations in the world<sup>116</sup>, and they organize a worldwide convention every three years<sup>117</sup> (Mei, 2000:32-52). To attract donations and investments, the Township government often invites overseas Moy lineage leaders to visit their ancestral place (Editors of Nei Nam's Flower, 1988c). Thus, the influences of the Moy lineage can be seen in almost every major donation project in Duanfen (Mei, 2000:112-119).

In recent years Taishan's government policy towards lineage revivals as well as other religious activities is "Three Nos" – no encouragement, no support, and no permission for any lineage or religious activity. However, in 1997 the establishment of the Moys' Ancestral Memorial Park, which consists of the Moys' Ancestral Hall and several buildings, went underway in Duanfen with a fund of RMB 680,000 yuan raised by the Chicago Moy Association and other Moy associations in the world (Editors of Nei Nam's Flower, 1997). Obviously, this major event would not have been possible without acquiescence from the Duanfen Government during the construction. In two years the park was completed. Inside the Moys' Ancestral Hall, there are dozens of ancestral tablets in the altar. Thereafter, during many ceremonies to honour donors, in which transnational Moys were the major contributors and guests, festivals and other important occasions, they typically entered the Moys

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<sup>115</sup> Residents surnamed Moy constitute 21 percent of Duanfen's population.

<sup>116</sup> These Moy Associations are located in Chicago, New York, Washington, Boston, Bloomington, Detroit, Seminole, Pittsburgh, San Francisco, Toronto, Hong Kong, Taipei, Penang and Singapore.

<sup>117</sup> The 10<sup>th</sup> Moy World Convention was held in Jiangmen on December 13<sup>th</sup>, 2006. The top local authorities from both Taishan and Jiangmen were invited to the opening ceremony (Information from the website of Duanfen Government, <http://duanfen.tsinfo.com.cn/show.asp?ID=131>, accessed on January 12, 2006).

Ancestral Hall with offerings to pay respect to their ancestors (Editors of Nei Nam's Flower, 2000). The Moy transnationals and associations also encourage and sponsor genealogical drafting and publications as well (Mei, 2000:129).

When it comes to donating money, Taishanese transnationals usually give priority to projects which can benefit their lineage or sub-lineage members within the ancestral villages. When a donation project is proposed, lineage organizations often take on the responsibility of raising money among their members, which results in different lineages or sub-lineages from one village or community only supporting the projects which are beneficial to their kinsmen. There is often a lack of cooperation among different lineages on projects utilizing donations. This is particularly the case with donations directed towards educational projects. The Duanfen Middle School was founded by two American Moys in 1906 with the aim of providing elementary education to children of the Moy lineage in their ancestral village. The original site was located in the Moy Ancestral Hall. With the expansion of the school, the Moy Lineage relocated the school in 1931, endowing it with 30 *mu* of its lineage land beside the central market and 70,000 yuan from its Hong Kong Moy Ancestral Fund. In addition, they extended educational privileges to all the Moy families in the Duanfen region. Throughout several decades, the school has consistently received donations from transnational Moys (Duanfen Township Government, 2005:102; Mei, 1986:23-24).

Patrons of the Jianglian Middle School built in 1982 beside Jianglian village were all Jiangs originating from Jianglian and residing in Hong Kong, Macao, North America and Australia (Mei, 1986:25). The Yangzheng Middle School was established by Chens in the US, who originated from the Chen lineage of Shangze village in Duanfen (Mei, 1986:26; Taishan CCP Head Office *et al.*, 2002:140). The Chengwu School, the first modern

education institution in Taishan, and later the Chengwu Middle School, were achievements of Ng transnationals (Duanfen Township Government, 2005:102-103; Mei, 1990). Similar examples can be found in minor donation projects as well. For instance, forty-one Ruan transnationals sponsored a tap water project in Xiayang village in 1990 (Editors of Nei Nam's Flower, 1990b) and, donors of the village road and library in Libi village were all overseas Chens (Editors of Nei Nam's Flower, 1991). In both of these cases, there were no contributors of any other surname.

As localism and exclusionism are some of the major features of lineage organizations, competition and conflict may rise among lineages (Freedman, 1958:127). Thus donations, in many cases, symbolize power, wealth, and affluence of a lineage or sub-lineage. Such competition may appear in the form of repeated donations from different lineages or sub-lineages towards one project or several similar ones. A good example of this is the construction of Fengshan Park in Duanfen. The gate tower, or the inner gate, was donated by the New York Moy Association. Yet fifty meters away to the major road, was another outer gate, which was donated by the Chicago Moy Association. The Hong Kong Moy Association built the center square in the park. All were constructed in luxurious style with the name of each association prominently displayed on the buildings. Some other overseas lineage associations, which have a smaller population and are financially weaker could only fund minor buildings or facilities in the park, such as tiny bridges and kiosks (Wen, 2000). Thus, lineage or sub-lineage affluence and wealth can be made apparent through a comparison of the projects funded by donations.

Development of industry and service sectors in Taishan has attracted many labour migrants from other places, which has brought about heterogeneity in residence, population,



ethnicity and social values in the local community. There were more than 100,000 migrant labourers, or *liudong renkou* (floating population)<sup>118</sup> currently living in Taishan in 2006, most of whom were employed in manufacturing, agricultural and service sectors<sup>119</sup>. Migrant labourers from other regions working in *qiaoxiang* is also common in other parts of the Guangdong and Fujian provinces (Huang, 1999). In areas such as Duanfen, where FDI factories are concentrated in industrial parks, migrant workers constitute a high proportion in the labour force. During the 2000 survey, I visited six enterprises (four manufacturing factories and two eel-raising fisheries) in Duanfen and interviewed twenty-five migrant workers (Johnson and Zhang, 2006). All of the workers in the assembly lines and fisheries originated from other provinces such as Guangxi, Sichuan, Anhui, and Fujian. They came to Taishan in groups and successfully found employment opportunities through personal networks. They earned about ¥600 RMB yuan per month on average, lived in crowded dormitories and ate in the canteens provided by the employers, most of whom were Taishanese transnationals. Most migrants spent their free time with colleague migrants of common origin. Few of them had social interactions with local residents. In the eyes of locals, the migrant workers who live in the neighbourhood were outsiders and strangers (Johnson and Zhang, 2006).

Taishanese transnationals invest in Taishan, yet the reality is that few local residents work in their factories. In the 2000 survey, only one household had a member working in the local FDI factory in Duanfen. However, this female worker came from Guangxi Province several years ago. She married a local man and remained in Duanfen. Why do the local

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<sup>118</sup> According to the Chinese government categorization, a person who works or lives in a place that his/her household registration (*Hukou*) does not belong to, is a migrant or floating/outside person.

<sup>119</sup> Data from [http://www.jiangmen.gov.cn/zxzx/sssqxw/ts/t20060927\\_29353.htm](http://www.jiangmen.gov.cn/zxzx/sssqxw/ts/t20060927_29353.htm), the homepage of Jiangmen Government (Accessed on January 1<sup>st</sup>, 2007).

people not work in the FDI enterprises in the local community? This is a complicated question. In the 1980s when the Taishanese transnationals began to invest in Taishan, there were a considerable number of locals working in the factories. In 1983, there were 1,200 villagers employed in Duanfen's first FDI factory invested in by Mrs. Liang from Hong Kong (Duanfen Township Government, 2005:231). At the time I visited the factory in 2000, all the workers on the assembly lines were from other places. Similar situations can be found in other factories in Duanfen as well. In my fieldwork, I have asked several local young men who recently graduated from high school about their career plans. Their first choice was to go abroad if they could find someone who would sponsor their emigration visa. The second was to work in big cities such Guangzhou and Shenzhen, or Dongguan in the eastern Pearl River delta, where wage levels are much higher than in Taishan<sup>120</sup>. The last choice was rather to hang around than to find a local job. Most of them shrugged off the unskilled jobs in the local area and thought they were only for the outsider migrants. It is unclear whether or not the owners of the FDI enterprises, including the Taishanese transnationals, are willing to hire locals who have linguistic advantages in the local area<sup>121</sup>.

Therefore, FDIs, including those from Taishanese transnationals, have benefited the local government by paying taxes, but have had little direct effect on the livelihoods of local residents, as most of the positions created by the FDIs are taken by labour migrants from other areas. As Johnson has suggested (Johnson, 2007), the comings and goings of population movement in this region has formed an ironical circle – Some of the locals have moved abroad, and migrant labourers from hinterland have moved in to fill the labour gap, and work in factories, most of which are owned by Taishanese transnational entrepreneurs. In

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<sup>120</sup> According to statistics in 2004, the annual wage of a fully employed staff in Dongguan is 2.45 times of that in Taishan (See Appendices 5 & 6).

<sup>121</sup> As I did not interview the FDI owners, this remains a potential topic for future research.

this case, it is not exaggerative to say that the internal migration to Taishan is triggered by external migration abroad, or consequences of emigration. Yet, there is at least one irony common fact between internal migrant labourers and *huaqiao* – Most of the labourers in *qiaoxiang* enterprises today are themselves outsiders albeit in their own country, in some degree, repeating the sojourning experiences of earlier generations, including their present employers, of *huaqiao* (Huang, 1999:215). If emigration in Taishan creates two parts of an extended community which are tightly linked by remittances, donations, investments and other social ties across national boundaries, in-migration of labour workers divides the local community into two – one is for the locals and extends overseas, the other is for the labour migrants and links with hinterlands in China. The actors – the transnationals, the locals, and the internal labour migrants – are performing a new trio of goings and comings within and beyond Taishan.

Like remittances that widen the income gap among local households, donations and investments by Taishanese transnationals also bring about developmental disparities within Taishan as these external sources are unevenly distributed. As donations and investments often flow to or near the towns and ancestral villages where the transnational contributors originated (Chiu, 1995), places with few transnational ties or with transnationals who are incapable of making financial contributions lag behind those receiving transnational donations and investments. Given the fact that the Taishan government has a limited budget, public sectors and infrastructure in these places have not been fundamentally improved. For instance, the Haiyan Overseas Chinese Farm, a township level entity located in the barren southwest corner of Taishan, was established in 1963 to accept hundreds of refugees of Chinese-origin who suffered both economic and political persecution in some Southeast

nations and were forced to flee to China<sup>122</sup>. Most of the residents on the farm are Chinese returnees and have many connections with Southeast nations; however, most are economically poorer than China. Haiyan Farm has therefore received fewer overseas remittances and donations than other locations in Taishan. All its public sectors and infrastructure rely heavily on government support, and it remains one of the least developed communities in Taishan<sup>123</sup>.

I have no intention here of exaggerating the negative effects of Taishan's transnational development pattern. Yet some of these negative effects, such as the enormous waste of donations, especially in education, dependency of individuals on remittances and public sectors on donations, whether intentionally or unexpectedly brought about by transnational contributions, have impaired Taishan's long-term development. The situation of a widening income gap among individuals, regional disparities by unbalanced donations and investments, segregated co-residence between locals and migrant workers in the community, reluctance of the younger local generation to engage in economic production, and insufficient input of the government on public and infrastructure sectors, forms the dark side of Taishan's on-going social economic transformation and casts shadows on Taishan's sustainable development. Considering both the advantages and disadvantages of Taishanese transnational contributions, particularly in the case of donations, I view this development pattern as segmented and disjointed, in which individuals and communities do not equally benefit, and in which some economic sectors are well developed, while others lag far behind. Throughout Taishan's history, a remedy for its development impasse has not been found yet.

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<sup>122</sup> For more information of the hostility of some Southeast nations towards ethnic Chinese and China's policy towards the so-called Chinese Overseas Returnees, please refer to Fitzgerald and Ross's works (Fitzgerald, 1972; Ross, 1988)

<sup>123</sup> Information obtained from website of Haiyan Overseas Chinese Farm at <http://haiqiao.tsinfo.com.cn/01.htm>, accessed on February 19, 2007.

## **Global Significance of Taishan's Development Experience**

Taishan's developmental experience under its transnationals' deep participation not only diversifies development paths in China, but also has international similarities and deserves global comparison. International remittances from immigrants in industrialized nations also flow in large volumes to Latin America and the Caribbean (Conway and Cohen, 1998; Massey and Parrado, 1994; Solimano, 2005; Zarate-Hoyos, 2005), Southeast Asia (Hugo, 2005), South Asia (Nayyar, 1994), the Middle East and North Africa (El-Sakka, 2005), and Eastern Europe (Lianos and Glytsos, 2005). In the context of international communities, it has been debated whether emigrants' contributions to the economy of the receiving countries, particularly transnational remittances, are beneficial or harmful. Proponents see remittances in general as a type of effective measure to ease income distribution disparity, to improve standards of living and to stimulate the market economy in the countries receiving such remittances (Ali, 1979; Chilivumbo, 1985; Keely, 1984; Stahl and Arnold, 1986), whereas critics suggest that international migration and remittances have made the source country of migrants economically dependent, unstable, distorted, and declining (Birks and Sinclair, 1980; Chami *et al.*, 2003; Russell, 1986; Swamy, 1981:1 & 38).

The two contradicting views may be considered an extended debate between the modernization approach (Parsons, 1966, 1971; Rostow, 1960) and dependency theory (Amin, 1976; Cardoso and Faletto, 1979; Dos Santos, 1970; Frank, 1967, 1969) over the role of international links and forces in the development of a specific region. In addition, other development approaches such as the world system (Galtung, 1972; Wallerstein, 1974, 1976),

globalization (Brenner, 1999; Castells, 1997; Sassen, 1988), and social capital theories (Chen and Wu, 2006; Douw *et al.*, 1999; Lever-Tracy, 1996; Lin, 1997; Nayyar, 1994) also try to explain the influences of international forces on local changes. In consideration of its long history of emigration, extensive international connections, great financial contributions in terms of remittances and donations as well as investments from transnationals, and a deep-rooted transnational mentality, how can Taishan be linked with these theories in terms of providing some degree of elucidation to them?

First of all, transnational contributions have undoubtedly stimulated Taishan's economic and social modernization. As discussed in Chapter 4, social turbulence was one the factors pushing Taishanese to settle down abroad, and those left behind desperately needed financial help. For the remittance recipients, every dollar they received made a big difference in their daily lives. With the growing influx of remittances and donations, the modern schooling system was introduced to Taishan. Village houses and market-town architecture of distinctive styles were built. Ancestral halls were repaired. Market towns grew or were established. Rural roads were paved. Modern lifestyles were introduced. Goods were exchanged between the place of origin and that of destination. For a short period of time, until the Japanese occupation, there was train service between Taishan and Jiangmen. It was reported that remittances to Guangdong Province constituted about eighty percent of the total national remittances between 1931 and 1935 (Xia, 1992:8). About half of the remittances to the province went to Taishan alone (Mei, 2005:93). Such large and consistent volumes of financial support from abroad allowed the western Pearl River delta region to prosper and become one of the economic centers in Guangdong in the 1920s and 1930s (Johnson, 2007:28).

The three decades after 1949 saw the western delta become economically marginalized as transnational support was gradually cut off. With the resumption of remittances and donations after 1978, the western delta, especially Taishan, has been thriving ever since. Remittances are growing, and play an important role in household income as they did before 1949. The average remittances per receiving household were RMB 1,386 yuan in 1985, 5,141 in 1993, and 8,713 in 1999<sup>124</sup>. Remittances are spent on housing, education, health, entertainment, ceremonies and other needs. Commerce, service occupations, and petty commodity production centered on the household consumption are well-developed. With Taishanese transnational donations, hundreds of schools, libraries, and hospitals were newly built. Village transportation networks and drinking water systems were upgraded. Thus, Taishan's public welfare and social infrastructure have been greatly improved. The recent development strategy of Taishan to attract more FDIs has allowed Taishan's economic structure to be transformed from being agriculturally dominated to one in which industry and tertiary productions have become the primary economic foci. The GDP of Taishan increased 8.49 times from 1988 to 2004. In the same period, industrial output increased by more than five times<sup>125</sup>. If it is said the economy in the central and eastern wing delta already took off in the 1980s and early 1990s (Cheng, 1998:405-414; Vogel, 1989), the western delta, driven by industrial and service sectors, is ready to take off soon.

It seems that Taishan's transformation during the last three decades can fit into the modernization model in terms of economic changes. However, from a historic perspective Taishan's economic changes do not follow a lineal evolutionary path, as predicted by modernization theory. Its economy largely developed during the first three decades of the

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<sup>124</sup> Calculated according to Table 5.4.

<sup>125</sup> Calculated according to Appendix 5.

1900s, disrupted during WWII, recovered slightly for a short period after the war, stagnated during the Cultural Revolution, and redeveloped in China's reform era. Also, the driving force in modernization is technological invention and marketization closely related to economic production, whereas the crucial factor in Taishan's development pattern is the continuous financial contributions from a special type of social capital – transnational ties, and much of the financial contributions are mainly used for consumption rather than production in more than one century.

It is undeniable that transnationals' contributions have bred dependency of the recipients, the community, and the government in Taishan. According to Chen Ta's study of the emigrant communities in Guangdong and Fujian provinces during the early 1930s (Chen, 1940:65, 68 & 87), the majority of emigrant family incomes came from remittances, and a considerable number of them depended upon remittances for subsistence. Throughout several decades before 1949, Taishan suffered from political turmoil, natural disasters, bandits, and severe food shortages. Much of the grain needed in Taishan had to be purchased from overseas using the inflows of remittances (Hsu, 2000a:42; Huang, 1988:12). From the turn of the twentieth century until 1937, annual remittances to Taishan exceeded its agricultural output (Yu, 1983:48). During the time when transnational support, especially remittances, was cut off, economic prosperity in Taishan dramatically decreased. During the period of the Anti-Japanese War when the Japanese army invaded and occupied Taishan, many remittance dependants, who had been the objects of jealousy of non-remittance families before the invasion, became refugees, beggars, with some even starving to death (Duanfen Township



Government, 2005:9-10)<sup>126</sup>. Peterson also reported a similar economic dependent situation during the 1950s (Peterson, 1986:88).

Since the reform era, local Taishanese have enjoyed a much more affluent life than before, however, dependency of both individual households and the local communities upon their transnational supports has not changed much. My research has illustrated that around 90 percent of the local households with transnational ties receive remittances, and a number of them are depend upon such external support for their primary income. If the receivers are elders who cannot physically engage in economic activities, remittances are the only source that they can count on. In the case of transnational donations, several public sectors, such as schools, hospitals, and village planning, depend almost entirely on transnational sponsorship because the local government has insufficient revenue to meet the needs of rapidly expanding public sectors. Thus, donation volumes appear relatively large in comparison with revenue. For example, the amount of donations of Taishanese transnationals to Taishan's public sectors in 1984 equalled 86 percent of the total revenue expenses of Taishan in the same year (Editing Committee of Guangdong Gazette, 1996:327). In 1987, the ratio of donations to the government's revenue was nearly eighty percent<sup>127</sup>. It is hard to imagine that, were it not for millions of Taishanese transnational donations, hundreds of new schools, hospitals, roads, nursing centres, and other public projects would not have been what they are today. Transnational investments also act as levers for the local economy, particularly industrialization. Taishanese transnational investment accounts for half of the total number of FDI projects in Taishan.

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<sup>126</sup> The tragic life of remittance dependants during this period was also vividly depicted in Woon Yuen Fong's fiction on Taishanese transnational females (Woon, 1998).

<sup>127</sup> Calculated according to Table 6.4 and Appendix 5.

Similar to some individuals relying on transnational remittances, local governments, to some degree, also depends upon transnational donations to support and expand several public sectors. As shown in Chapter 6, it is certain that most of the budget of school and hospital construction comes from such an external source. It is seldom reported that the local government has financed village-planning projects, such as building paved roads and bridges, and improving drinking water system. Little financial assistance from the government is given to the elderly and disabled. In some cases, the local government could have been capable of action, but failed to do so. In 2003, a typhoon affected Taishan and destroyed hundreds of houses and left many homeless. Eight Hong Kong entrepreneurs who had businesses in Taishan launched a fundraising campaign to help out these victims and collected RMB 160,000 yuan. The Party Secretary of Taishan attended the donation ceremony and, ironically, also “donated” a cheque of ¥50,000 RMB yuan on behalf of the government (Editors of *Nei Nam's Flower*, 2003a). Obviously, the government had mixed up its responsibilities and obligations to help its citizens in need.

It seems the dependency theory is also valid in the case of Taishan. However, the dependency situation in Taishan is fundamentally different from that of a dependent relationship between developed and developing/ underdeveloped nations. In the former case (aside from investments), transnationals help their place of origin by giving, instead of taking. They want to be part of the community from which they originate (Hsu, 2000b). In the latter case, industrialized nations export raw materials from and import products to the developing/underdeveloped nations, appropriating an economic surplus from this process. The First World of affluent economies aims to colonize the poorer nations and maintain an unequal political and economic hierarchy in the international community.

In general, Taishan's case seems to give mixed support to the modernization and the dependency theories. It confirms that transnational connections, as a special type of social capital, can be used as a powerful development tool for the place of origin. In addition, this study shows that political changes and cultural particularities in both the sending and receiving countries during the process of migration should not be neglected. Hence, as Woon pointed out (Woon, 1990:164), any attempt to generalize the impact of international links on internal socioeconomic development in different types of communities and regions should give caution to the particularities of these places to avoid overgeneralization.

This research, by examining three major forms of transnational monetary inputs, has illustrated that transnational influences on the socio-economic transformation of Taishan have been profound not only in historic periods, but also after 1978. A transnational development pattern has been formed in Taishan in the process of Taishanese comings and goings during more than one century. As long as the transnational mentality, the mental faith of emigrating, keeping connections with emigrants, receiving financial support from them and relying on such support in some circumstances, permeates in Taishan, the transnational development course will not change fundamentally in the future. Remittances, donations, and investments from transnationals will flow to Taishan as they have been before, and there will be more stories like those of Mr. Ho, Mrs. Ruan, and Mrs. Moy.

## Appendix 1 Transliteration List of Key Terms

Pinyin	English	Chinese Characters
Aiguo huaqiao	Patriotic huaqiao	爱国华侨
Duanfen	Duanfen	端芬
Guiqiao	Overseas Chinese returnee	归侨
Huanren (Huayi)	Chinese overseas	华人 (华裔)
Huaqiao	Overseas Chinese	华侨
Huaqiao juanzeng	Overseas Chinese donation	华侨捐赠
Huaqiao touzi	Overseas Chinese investment	华侨投资
Jianglian	Jianglian	江联
Nongmin	Peasant	农民
Qiaofang	Overseas Chinese house	侨房
Qiaohui	Overseas Chinese remittance	侨汇
Qiaojuan (Qiaoshu)	Dependent of overseas Chinese	侨眷 (侨属)
Qiaokan	Overseas Chinese Magazines	侨刊
Qiaoxiang	Native place of overseas Chinese	侨乡
Qing jin lai	Inviting in	请进来
Taishan	Taishan	台山
Tongbao	Compatriot	同胞
Yichao daihui	Bringing cash instead of remitting	以钞代汇
Zou chu qu	Reaching out	走出去

## Appendix 2 Questions Related to Chinese Transnationals in the Second and Third Survey in Jianglian Village

### A1. Information of the household head:

Sex \_\_\_\_

Age \_\_\_\_

Birthplace \_\_\_\_

Education \_\_\_\_

Previous job and employer \_\_\_\_, \_\_\_\_

Current job and employer \_\_\_\_, \_\_\_\_

Marriage status \_\_\_\_

Date of marriage \_\_\_\_

### A2. Information of other family members:

Family member	Relation with the household head	Age	Birthplace	Education	Occupation	Marriage status	Date of Marriage
Member 1							
Member 2							
Member 3							
Member 4							

Member 5							
Member 6							
Member 7							
Member 8							
Member 9							
Member 10							
Member 11							
Member 12							
Member 13							
Member 14							

A5. Are there any persons who are not family members who contribute to your household expenses?

Yes \_\_\_\_ And who are they? Where do they live? How do they make a living?

No \_\_\_\_

A21-1. Have you or any of your family members been in touch with a family member or a relative who currently resides in Hong Kong, Macao, or overseas?

Yes \_\_\_\_ (If yes, please continue)

No \_\_\_\_ (If no, please jump to Part A25)

A21-2. Was this person born in

a. The Chinese mainland

b. Out of the Chinese mainland, please specify \_\_\_\_.

A21-3. How often does this person visit you?

A21-4. Does this person remit to you/your family or bring cash to you/your family when he/she visits?

Yes \_\_\_\_ (If yes, please continue)

No \_\_\_\_ (If no, please jump to A25)

A21-5. On average, how much money does this person remit or bring each time?

A21-6. On average, how often does this person remit or bring?

A21-7. What is (are) the relationship(s) between you and the remitter(s)?

A22-1. Do you expect this person to continue to remit or bring cash to you or your family?

Yes \_\_\_\_ If yes, why? (Please list the major reason) \_\_\_\_

No \_\_\_\_

A22-2. If this person does not continue to remit and bring cash, or if you do not expect this person to do so, will your family live in difficulty?

Yes \_\_\_\_

No \_\_\_\_

A23-1. Did anyone of your family members or relatives residing in Hong Kong, Macao, or overseas introduce any of your family members to a potential spouse residing in Hong Kong, Macao, or overseas?

Yes \_\_\_\_\_

No \_\_\_\_\_

A23-2. Did anyone of your family members or relatives residing in Hong Kong, Macao, or overseas sponsor any of your family members to move to Hong Kong, Macao, or overseas?

Yes \_\_\_\_\_

No \_\_\_\_\_

A24-1. Did you take or have you been taking care of any properties of anyone of your family members or relatives residing in Hong Kong, Macao, or overseas?

Yes \_\_\_\_\_ (If yes, please answer A24 (2)).

No \_\_\_\_\_ (If no, please jump to A25).

A24-2. What are these properties used for?

B4-1. Do you plan to send your child(ren) to study outside of the Chinese mainland?

Yes \_\_\_\_\_ (If yes, please continue)

No \_\_\_\_\_ (If no, please jump to B5).

B4-2. Why do you plan so?

B4-3. Where would you want your child(ren) to study outside of the Chinese mainland?



B4-4. Please specify the university/college/school you want your child(ren) to study in, if possible.

C17. Do you have *Qiaojuan* in your joint-farming entity?

Yes \_\_\_\_\_

No \_\_\_\_\_

C24 (4). Do you obtain any financial support from a person residing in Hong Kong, Macao, or overseas for your business?

Yes \_\_\_\_\_.

No \_\_\_\_\_.

D2 (6). Please indicate your previous total household income RMB \_\_\_\_\_.

D2 (7). In the previous year, how much of your family income was provided by family members and/or relatives residing in Hong Kong, Macao, or overseas?

D 7 (2) Which one of the following items does your family own? Please specify if any items were brought from outside of the Chinese mainland by a family member or a relative residing in Hong Kong, Macao, or overseas:

Tractor

Motorcycle

Truck

Boat

Car

Colour TV

Video player

Air conditioner

Refrigerator

Washing machine

Telephone

Pager

Cell phone

D8 (2). If you need to borrow money, will you borrow from a family member or a relative residing in Hong Kong, Macao, or overseas?

Yes \_\_\_\_\_

No \_\_\_\_\_

D8 (3). Please list the reason(s) that you need to borrow money.

D9. Have you or anyone in your household ever traveled or visited outside of the Chinese mainland?

Yes \_\_\_\_\_

No \_\_\_\_\_

D11. Have you ever donated to any public projects?

Yes \_\_\_\_\_, and what are they?

No \_\_\_\_\_.

D13 (2). Do you plan to emigrate?

Yes \_\_\_\_\_, Where? And Why?

No \_\_\_\_\_.

**Appendix 3 Chinese Immigrants  
to the United States, 1879-1940**

Year	Number of Chinese Immigrants to US		Year	Number of Chinese Immigrants to US
1879	9,604		1910	1,968
1880	5,802		1911	1,460
1881	11,890		1912	1,765
1882	39,579		1913	2,105
1883	8,031		1914	2,502
1884	279		1915	2,660
1885	22		1916	2,460
1886	40		1917	2,237
1887	10		1918	1,795
1888	26		1919	1,964
1889	118		1920	2,330
1890	1,716		1921	4,009
1891	2,836		1922	4,406
1892	---		1923	4,986
1893	472		1924	6,992
1894	1,170		1925	1,937
1895	539		1926	1,751
1896	1,441		1927	1,471
1897	3,363		1928	1,320
1898	2,071		1929	1,446
1899	1,660		1930	1,589
1900	1,247		1931	1,150
1901	2,459		1932	750
1902	1,649		1933	148
1903	2,209		1934	187
1904	4,309		1935	229
1905	2,166		1936	273
1906	1,544		1937	293
1907	961		1938	613
1908	1,397		1939	642
1909	1,968		1940	643

Source: (Chen, 1980:174)

**Appendix 4 Annual Average Exchange  
Rates of US Dollar and HK Dollar for RMB Yuan**

Year	US \$100 for RMB Yuan	HK \$ 100 for RMB Yuan
1981	170.51	30.41
1982	189.26	31.15
1983	197.57	27.36
1984	232.70	29.71
1985	293.67	37.57
1986	345.28	44.22
1987	372.21	47.74
1988	372.21	47.70
1989	376.59	48.28
1990	478.38	61.39
1991	532.27	68.45
1992	551.49	71.24
1993	576.19	74.41
1994	861.87	111.53
1995	835.07	107.96
1996	831.42	107.51
1997	828.98	107.09
1998	827.91	106.88
1999	827.83	106.66
2000	827.84	106.18
2001	827.70	106.08
2002	827.70	106.07
2003	827.70	106.24
2004	827.68	106.23
2005	827.65	106.15

Sources: Figures from 1981 to 2003 are cited from *China Foreign Economic Statistical Yearbook* (Trade and Foreign Economic Statistical Division of National Statistical Bureau, 2004:10). Figures of 2004 and 2005 are compiled from the website of Data Empery at <http://www.dataempy.com/search/Result.asp?Id=5517> (Accessed on April 10<sup>th</sup>, 2006).

### Appendix 5 Selected Annual Economic Indicators of Taishan, 1985-2004 (Yuan)

Year	GDP (10 000)	Primary Sector (10 000)	Secondary Sector (10 000)	Tertiary Sector (10 000)	Agricultural Sector (10 000)	Industrial Sector (10 000)	Revenue Income (10 000)	Average Wage of Fully Employed
1985					23 710	74 881		1 457
1986					29 970	89 286		1 572
1987	270 286				34 250	153 545	7 572	1 531
1988	166 513	68 502	54 807	43 204	36 319	161 140		
1989	187 124				39 672	200 619	11 386	2 355
1990	205 802						12 608	2 649
1991	205 802				130 179	299 813	14 137	2 921
1992	260 421	83 405	96 905	80 111	140 688	425 468	15 635	3 370
1993	365 441	92 454	144 067	128 920	197 475	1 869 080	23 847	4 963
1994	542 775	136 724	215 412	190 639	154 948	1 046 347	23 886	6 634
1995	633 589	149 414	268 896	215 279	166 850	1 333 000	28 293	7 150
1996	749 610	168 190	343 003	238 417	18 883	1 778 756	25 761	7 200
1997	849 520	180 940	375 580	293 000	202 164	2 107 926	27 573	7 320
1998	906 400	186 720	392 460	327 220	212 502	2 238 300	27 573	7 600
1999	979 640	187 090	434 830	357 720	222 997	2 582 102	29 133	8 250
2000	1 088 022	191 410	492 105	404 507	236 271	2 720 743	30 942	8 579
2001	1 159 258	191 020	522 538	445 700	246 370	3 064 596	34 039	9 077
2002	1 236 261	193 620	560 576	482 065	257 458	3 463 606	37 452	9 530
2003	1 260 619	187 618	558 175	514 826	433 400	2 251 944	38 599	9 816
2004	1 414 677	202 485	635 246	576 946	459 147	2 610 581	37 972	10 318

Source: Compiled varied data from *Guangdong Statistical Yearbook* (Guangdong Provincial Bureau of Statistics, 1986, 1987, 1988, 1989, 1990, 1991, 1992, 1993, 1994, 1995, 1996, 1997, 1998, 1999, 2000, 2001, 2002, 2003, 2004, 2005).

**Appendix 6 Selected Annual Economic  
Indicators of Dongguan, 1978-2004 (Yuan)**

Year	GDP (10 000)	Primary Sector (10 000)	Secondary Sector (10 000)	Tertiary Sector (10 000)	Agricultural Sector (10 000)	Industrial Sector (10 000)	Revenue Income (10 000)	Average Wage of Fully Employed
1978	61 122	27 235	26 781	7 106	112 533	55 038		
1979	65 487	26 680	28 567	10 240	108 624	59 925		
1980	70 440	26 762	31 766	11 912	110 258	69 479		
1981	87 817	33 595	40 062	14 160	114 926	79 552		
1982	108 405	38 510	52 935	16 960	132 337	92 456		
1983	121 643	41 529	61 337	18 777	132 074	94 122		
1984	146 340	47 94	67 848	30 498	142 553	115 661		
1985	203 784	65 138	98 946	39 700	156 253	169 144		1 333
1986	266 474	86 983	112 531	66 960	196 467	233 461		1 698
1987	341 601	105 825	143 545	92 231	209 771	339 468		
1988	469 864	129 136	223 697	117 031	204 969	515 918		
1989	506 114	138 619	216 161	151 334	204 642	629 199	31 888	3 295
1990	646 150	146 637	305 940	193 573	219 801	743 989	35 139	3 552
1991	748 415	149 788	371 066	227 561	224 549	956 779	42 436	3 777
1992	845 408	161 800	426 925	256 683	237 766	1 359 822	56 204	4 609
1993	1 149 478	162 960	614 341	372 177	197 475	1 848 712	93 828	6 228
1994	1 545 383	199 519	821 302	524 562	212 051	2 494 875	130 359	8360
1995	2 056 273	246 648	1 121 058	688 567	233 836	3 250 279	179 063	9 682
1996	2 451 106	288 545	1 308 312	854 249	243 361	4 021 701	96 541	10 382
1997	2 947 037	300 001	1 558 612	1 088 424	253 217	4 919 247	109 276	10 691

(Continued)

Year	GDP (10 000)	Primary Sector (10 000)	Secondary Sector (10 000)	Tertiary Sector (10 000)	Agricultural Sector (10 000)	Industrial Sector (10 000)	Revenue Income (10 000)	Average Wage of Fully Employed
1998	3 555 119	306 088	1 913 002	1 336 029	255 820	5 969 371	151 012	11 416
1999	4 128 370	306 757	2 243 889	1 577 724	273 198	7 333 969	182 577	12 557
2000	4 927 132	310 772	2 691 479	1 924 881	273 806	8 984 112	302 230	14 051
2001	5 789 340	315 627	3 152 987	2 320 726	277 204	10 911 226	450 163	16 183
2002	6 728 910	303 398	3 697 088	2 728 424	296 184	13 732 182	552 933	17 743
2003	9 479 654	280 555	5 122 603	4 076 496	490 222	20 704 969	674 461	22 598
2004	11 552 982	277 357	6 405 998	4 689 627	441 912	25 832 222	721 959	25 326

Source: Compiled varied data from *Guangdong Statistical Yearbook* (Guangdong Provincial Bureau of Statistics, 1986, 1987, 1988, 1989, 1990, 1991, 1992, 1993, 1994, 1995, 1996, 1997, 1998, 1999, 2000, 2001, 2002, 2003, 2004, 2005; Yeung, 2001:244 & 246).

**Appendix 7 Selected Annual FDI  
Indicators in Dongguan, 1984-1997 (Yuan)**

<b>Year</b>	<b>Utilized Value of FDI (10 000)</b>	<b>Gross Industrial Output of FDI Firms (10 000)</b>
1984	2 007	
1985	2 894	35 522
1986	3 041	56 805
1987	11 258	90 615
1988	24 126	185 095
1989	24 949	234 040
1990	24 319	318 813
1991	26 154	430 925
1992	46 592	674 699
1993	93 428	876 681
1994	104 812	1 748 658
1995	105 665	2 709 417
1996	107 565	3 634 744
1997	121 427	3 357 365

Source: After (Yeung, 2001:248).



## Appendix 8 Price Indices of Guangdong Province 1978-2005

Year	Consumer Price Index (1978=100)	Consumer Price Index in Urban Areas (1978=100)	Consumer Price Index in Rural Areas (1978=100)	Retail Price Index of Industrial Products in Rural Areas (1996=100)	Ex-factory Price Index of Industrial Products (1996=100)	Investment in Fixed Assets Price Index (2000=100)
1978	100.0	100.0	100.0			
1979	103.0	104.6	100.3			
1980	111.8	114.5	101.7			
1981	122.0	121.7	103.7			
1982	124.9	124.9	105.8			
1983	125.7	128.3	106.3			
1984	127.2	130.8	108.4			
1985	114.5	153.1	113.3			
1986	151.5	160.3	118.3			
1987	169.2	180.9	129.4			
1988	220.3	234.3	163.0			
1989	266.6	285.6	194.8			
1990	254.8	278.2	189.4			
1991	256.4	284.6	190.9			
1992	271.3	308.5	195.3			
1993	320.6	376.4	225.6			
1994	381.3	455.5	256.4			
1995	425.6	515.1	274.6			
1996	444.3	552.2	287.0	100.0	100.0	
1997	444.7	563.7	289.9	100.1	97.3	
1998	431.4	554.2	283.2	94.9	88.9	
1999	417.1	545.3	275.6	92.7	86.9	
2000	416.7	553.0	276.1	95.9	96.4	100.0
2001	411.3	548.5	271.7	94.5	95.5	100.2
2002	405.1	540.9	267.3	91.2	92.0	99.9
2003	405.1	544.7	267.6	90.6	95.8	102.1
2004	416.9	558.9	270.2	92.1	106.0	108.6
2005	424.4	570.1	271.9	93.5	111.3	110.3

Source: *Guangdong Statistical Yearbook 2006* (Guangdong Provincial Bureau of Statistics, 2006:227).

## Appendix 9 Price Indices of China 1978-2005

Year	Consumer Price Index (1978=100)	Consumer Price Index in Urban Areas (1978=100)	Consumer Price Index in Rural Areas (1985=100)	Retail Price Index Areas (1978=100)	Ex-factory Price Index of Industrial Products (1985=100)	Investment in Fixed Assets Price Index (1991=100)
1978	100.0	100.0		100.0		
1979	101.9	101.9		102.0		
1980	109.5	109.5		108.1		
1981	112.2	112.2		110.7		
1982	114.4	114.4		112.8		
1983	116.7	116.7		114.5		
1984	119.9	119.9		117.7		
1985	131.1	134.2	100.0	128.1	100.0	
1986	139.6	143.6	106.1	135.8	103.8	
1987	149.8	156.2	112.7	145.7	112.0	
1988	177.9	188.5	132.4	172.7	128.8	
1989	209.9	219.2	157.9	203.4	152.8	
1990	216.4	222.0	165.1	207.7	159.0	
1991	223.8	233.3	168.9	213.7	168.9	100.0
1992	238.1	253.4	176.8	225.2	180.4	115.3
1993	273.1	294.2	201.0	254.9	223.7	145.9
1994	339.0	367.8	248.0	310.2	267.3	161.1
1995	396.9	429.6	291.4	356.1	307.1	170.6
1996	429.9	467.4	314.4	377.8	316.0	177.4
1997	441.9	481.9	322.3	380.8	315.0	180.4
1998	438.4	479.0	319.1	370.9	302.1	180.0
1999	432.2	472.8	314.3	359.8	294.8	179.3
2000	434.0	476.6	314.0	354.4	303.1	181.3
2001	437.0	479.9	316.5	351.6	299.2	182.0
2002	433.5	475.1	315.2	347.0	292.6	182.4
2003	438.7	479.4	320.2	346.7	299.3	186.4
2004	455.8	495.2	335.6	356.4	317.6	196.8
2005	464.0	503.1	343.0	359.3	333.2	199.9

Source: *China Statistical Abstract* (National Bureau of Statistics of China, 2006:94).

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