

THE SHIFTING STRATEGY OF TAIWAN'S NEW SOUTHBOUND POLICY (NSP) PROGRAMS

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ABSTRACT

This study examines how Taiwan's New Southbound Policy (NSP) has evolved over two major phases: the education phase (2019–2025) and the economic phase (2016–2018). This study identifies the structural factors driving this strategic shift by employing an exploratory qualitative approach and analyzing official Taiwanese government documents. The findings indicate that Taiwan shifted its strategy toward soft power-based educational diplomacy due to constraints in economic performance, as evidenced by the declining share of exports to NSP partner countries. After initially prioritizing economic development, Taiwan gradually integrated higher education as a key focus through initiatives such as INTENSE, “study and stay,” and Mandarin Education 2025. When viewed through the lens of Joseph Nye's concept of soft power, the second phase of the NSP presents education as a means of conveying values and fostering enduring cultural appeal. According to the study's findings, the NSP's transformation represents an adaptive response to both the limitations of traditional economic tools and domestic demographic pressures

Keywords: *New Southbound Policy, Taiwan, Education, Soft Power, Joseph Nye*

1. Introduction

Throughout its history, Taiwan has often faced challenges due to China's interference. China's rapidly growing power in recent years has strengthened its position with the “One China Policy” approved by the United Nations (UN) and all its member states. This policy states that the Republic of China (ROC) is the government that represents all of China, including Taiwan. China's interference with Taiwan limits Taiwan's ability to establish formal diplomatic relations with UN member state (Santoso & Windiani, 2021). To counter China's interference in its country, Taiwan has implemented several foreign policy strategies in an effort to become an active actor in the international system. One of its foreign policies is the New Southbound Policy (NSP) (Nguyen, 2025). The New Southbound Policy was established in 2016 by President Tsai Ing-

wen, focusing on international cooperation. This policy has 18 partner countries, including 10 ASEAN countries, several South Asian countries, as well as Australia and New Zealand (David & Waltz, 2023).

In its implementation, New Southbound Policy has shifted its focus through new and ongoing programs. Since 2016, Taiwan has successfully signed around 70 agreements in trade, investment, training, agriculture, and culture with NSP partner countries, and by the end of 2020, Taiwan's trade volume with partner countries had increased by approximately 12.9% compared to when the NSP was first launched (Hossain, 2022). Key economic programs included the Bilateral Investment Agreements (BIA) program and overseas investment funds, alongside trade promotion efforts implemented by the Taiwan External Trade Development Council (TAITRA) (Glaser et al., 2018)

Since 2019, the NSP deepened its focus on education through programs such as Industrial Talent Development. Entering NSP 2.0, Bi Cheu-an, Head of the Department of International and Cross-strait Education Affairs, noted a shift toward measuring the output of each scholarship and program, ensuring that recipients could benefit both parties (Office of Trade Negotiations Republic of China (Taiwan) & Bureau of Foreign Trade, n.d.). Several education-focused programs followed after 2020, including the INTENSE Program (2024), Mandarin Education 2025 (2022), Taiwan Global Pathfinders Initiative (2025), the Ph.D. Scholarship Program, the Bilingual Education Program in Higher Education (Ministry of Education Republic of China (Taiwan), 2025), and the New Southbound Policy Elite Study Program (*The 2022 New Southbound Policy Elite Study Program Wraps up in Taipei*, 2023). While the NSP has increasingly packaged its initiatives with educational programs since 2020, its foundational economic interests established from the beginning remain unchanged.

Taiwan's New Southbound Policy (NSP) has become one of the most discussed foreign policies in the field of international relations, particularly regarding Taiwan's relations with countries in South and Southeast Asia. The existing literature largely examines the NSP from two perspectives. The first focuses on its economic and trade dimensions, viewing the NSP as Taiwan's strategy to reduce dependence on the Chinese market and diversify its economic relations, with studies highlighting its role in enhancing trade and investment cooperation, including during disruptions such as the COVID-19 pandemic (Royatmi, 2022, Yeoh et al., 2018, Lim, 2021). The second examines its application across various sectors of cooperation—including international student mobility, scientific collaboration, and disaster management—arguing that the NSP has evolved into a comprehensive

cross-sectoral platform encompassing research collaboration and humanitarian aid, transcending its original economic framework (Yang, 2023, Chen, 2024, Radiamoda et al., 2024).

Although research on Taiwan's New Southbound Policy (NSP) has made progress, significant limitations remain. Soft power is often regarded as a secondary aspect of the NSP in studies that separate economic, sectoral, and soft power dimensions. Although initiatives in the fields of education and culture have garnered considerable attention recently, they are generally analyzed in isolation, thereby overlooking their role in shaping policy. By examining the development of the NSP and highlighting non-economic fields such as education and culture as crucial to Taiwan's regional engagement through a soft power framework, this study aims to address this gap and establish soft power as a key component of Taiwan's strategic approach by answering the question: How is the New Southbound Policy shifting through its existing programs.

2. Methods

This study employs an explorative research design and a qualitative methodology. The researcher serves as a key instrument in qualitative research, which is used to examine an object's natural conditions. Data analysis is done inductively, and the research findings emphasize meaning rather than generalization, according to Quantitative, Qualitative, and R&D Research Methods (Sugiyono, 2016). Because the goal of this study is to factually and methodically explore the shifting of Taiwan's New Southbound Policy and examine it within the context of soft power, the explorative research style was used. Secondary data from documents and literature reviews served as the study's data sources. The primary materials examined are from official publications of the New

Southbound Policy published by the Bureau of Foreign Trade at the Ministry of Economic Affairs and the Office of Trade Negotiations under the Executive Yuan. To support the conceptual analysis, this study also draws on books, scientific journals, and pertinent scholarly literature.

According to Sugiyono, source triangulation—which entails comparing and double-checking data gathered from many sources—was used to assess the veracity of the data. To guarantee data consistency and trustworthiness, triangulation was done in this study by contrasting official Taiwanese government papers with scholarly works and earlier studies. Through the phases of data reduction, data presentation, and conclusion drafting, data analysis methodologies were implemented (Sugiyono, 2016). Information pertinent to the New Southbound Policy was the main focus of the data collection. Additionally, before any conclusions were made, the data was presented as a methodical analytical narrative. In his book *Soft Power: The Means to Success in World Politics*, Joseph Nye developed the idea of soft power, which stresses attractiveness via institutions, policies, and ideals as tools for accomplishing foreign policy goals

3. Results and Discussion

New Southbound Policy's Initial Phase

The New Southbound Policy (NSP) was positioned as a key component of Taiwan's trade and economic policy during its initial launch period (2016–2018) in response to the dynamics of regional economic integration in the Asia-Pacific area. During this stage, the policy developed a strategy that prioritized creating mutually beneficial economic communities, boosting supply chain integration, and addressing the real requirements of partner nations (Office of Trade Negotiations Republic of China (Taiwan), 2017).

The Taiwanese government, led by President Tsai Ing-wen, has worked to rethink its place in the regional economy, not just as an exporter but also as a supplier of capital, technology, and resource integrators. One of the primary goals is to lessen reliance on a single market, especially mainland China, by reorienting cooperation toward 18 target nations in South Asia, Australia, New Zealand, and the ASEAN region. In this framework, increased cooperation between a number of critical industries, including information and communication technology (ICT), energy, petrochemicals, agriculture, and financial services, has made supply chain integration a top priority (Office of Trade Negotiations Republic of China (Taiwan), 2017). Taiwan's foreign direct investment in target nations increased to US\$97 billion by mid-2017 as a result of these efforts, and total trade exceeded US\$117.1 billion in 2018—a 22% increase from 2016 (Office of Trade Negotiations Republic of China (Taiwan) & Bureau of Foreign Trade, n.d.)

Numerous economic initiatives and programs were introduced concurrently to support these accomplishments. For instance, the Taiwanese government set up Taiwan Desks as integrated service centers that offer business, legal, and tax information to Taiwanese enterprises in a number of partner nations, including Indonesia, Vietnam, Thailand, the Philippines, and India. Additionally, Taiwan actively markets its flagship items while enhancing its industrial image by holding Taiwan Expo in major cities throughout partner nations. These expos, which took place in a number of nations between 2017 and 2018, successfully produced substantial business value (Office of Trade Negotiations Republic of China (Taiwan) & Bureau of Foreign Trade, n.d.). The Taiwan Halal Center was established in April 2017 with the goal of expanding market penetration efforts into Muslim markets, such as Indonesia, Malaysia, and Pakistan, while also fostering the

development of the home halal industrial ecosystem (Office of Trade Negotiations Republic of China (Taiwan), 2017).

Additionally, a human resource development approach, especially through industry-academia collaborative programs, strengthens the economic aspect of the NSP. Education is used as a tool for economic assistance throughout this first stage, with an emphasis on developing technical talent pertinent to business demands. Companies like Far East Machinery

are working with educational institutions to offer internship and on-the-job training programs for international students, while companies like MediaTek have started training programs for Indian engineers and executives in the field of hardware design. However, in order to improve cross-border competitiveness, Taiwanese e-commerce businesses are also assisted in forming alliances with regional distributors in the ASEAN area (Office of Trade Negotiations Republic of China (Taiwan), 2017).

The Taiwanese government is enhancing institutional connectedness through program-based measures as well as attempts to revise bilateral agreements, especially in the areas of taxes and investment protection with important partner nations. These actions are intended to reduce investment risks and improve the business climate. By boosting financing capacity to facilitate Taiwanese corporate expansion into the New Southbound region, financial institutions like the Import-Export Bank of the Republic of China also play a critical role (Office of Trade Negotiations Republic of China (Taiwan), 2017).

All things considered, the years 2016–2018 can be viewed as a stage of establishing the NSP's economic foundation. At this point, Taiwan is strategically establishing itself as a long-term development partner with an emphasis on cooperation, knowledge transfer, and sustainable economic integration in

addition to working to broaden its networks of trade and investment.

New Southbound Policy's Reorientation

The New Southbound Policy experienced a dramatic change between 2019 and 2025, moving from a phase that concentrated on building economic connections to one that intended to improve industrial talent through stronger educational integration. This phase has been dubbed "NSP Version 2.0" by the Taiwanese government, which reflects a change in emphasis from quantitative accomplishments—like the number of international students recruited—to qualitative accomplishments focused on concrete contributions to the workforce and industrial resilience. In other words, the degree to which the talent generated can satisfy the demands of industry in both Taiwan and their home countries is now used to gauge the policy's performance rather than the quantity of participants (Office of Trade Negotiations Republic of China (Taiwan) & Bureau of Foreign Trade, n.d.)

The Taiwan Ministry of Education started rerouting resources to guarantee the caliber and applicability of educational exchange programs in 2018 after successfully surpassing the initial student recruitment targets. This strategy is characterized by modifications to the evaluation process, which now prioritizes results like industry integration and work preparedness. In order to improve Government-to-Government (G2G) interactions, which are thought to be more strategic and long-lasting, the government has also centralized policies administratively by decreasing programs run independently by universities (Office of Trade Negotiations Republic of China (Taiwan) & Bureau of Foreign Trade, n.d.)

The NSP's emphasis at this time has also changed toward high-tech industrial areas in keeping with the dynamics of the global economy. The development of

general occupational skills was the focus of the previous phase, but starting 2019, STEM, finance, and semiconductors have received particular attention. Taiwan's efforts to enhance its position in the global supply chain, especially in the high-tech industry, while adjusting to Industry 4.0 trends are reflected in this direction. In this framework, education is seen as a strategic tool for supplying the talent required by future sectors rather than as a stand-alone sector (Ministry of Education Republic of China (Taiwan), 2025).

Additionally, domestic factors—particularly demographic issues like Taiwan's dropping birth rate—have an impact on NSP education policies. The government has created a "study and stay" policy to alleviate labor shortages, encouraging foreign students to continue their education in Taiwan as well as to reside and work there once they graduate. Education thus functions as a route for recruiting talent on a worldwide scale that is interwoven with the demands of the home market (Ministry of Education Republic of China (Taiwan), 2025).

The government, academic institutions, and business sector are increasingly integrated through a number of landmark initiatives that carry out this transition. For instance, the INTENSE program, which was introduced in 2024, is intended to be an international industrial talent education program in the fields of semiconductors and STEM. Students are required to work in Taiwan after completing their studies and receive stipends from partner companies in addition to government scholarships. Taiwan has also set up the INTACT Base in Indonesia as a hub for encouraging and enabling collaboration between universities in both nations in an effort to broaden the program's scope (Ministry of Education Republic of China (Taiwan), 2025)

However, the growth of the "2+i" program since 2019 shows how well the G2G collaborative strategy produces talent

that is ready for the workforce, especially through technological training for diploma holders. The success of this approach in meeting labor market demands is demonstrated by the high percentage of graduates opting to continue working in Taiwan. The Elite New Southbound Scholarship Program, which actively seeks faculty members from South and Southeast Asia to pursue advanced studies in Taiwan, is another example of efforts to improve educational quality. This program has a long-term impact on the development of academic capacity in the region (Ministry of Education Republic of China (Taiwan), 2025)

Additionally, as part of a plan for overseas students' social and professional integration, the Taiwanese government launched the Mandarin Education 2025 Program. By improving Mandarin language instruction, this program not only increases Taiwan's attractiveness as a study location but also makes it easier for students to integrate into the local workforce and culture. By encouraging the younger generation to obtain international experience through internships and worldwide networking, new efforts like the Taiwan worldwide Pathfinders Initiative in 2025 broaden the scope of talent mobility (Ministry of Education Republic of China (Taiwan), 2025)

All things considered, since 2019, the NSP has developed into a tactic that goes beyond the parameters of traditional educational collaboration. In addition to boosting Taiwan's position in international competition based on talent and innovation, this policy has evolved into a tool of national economic defense that methodically integrates the educational system with the unique requirements of Taiwan's future industries.

The Logic Behind the Shift: A Soft Power Analysis of the New Southbound Policy

The transition in Taiwan's New Southbound Policy (NSP) from an

economy-centered approach (2016–2018) to an education-centered approach (2019–2025) can be understood not as a deliberate redesign from the outset, but rather as a strategic adjustment shaped by intersecting structural pressures. Data show that the NSP's economic phase produced very few outcomes. According to data from Taiwan's Ministry of Finance, the proportion of NSP nations in Taiwan's overall exports actually decreased from 22.2 percent in 2013 to 20.9 percent in 2023; the greatest percentage under the Tsai administration was only 21.3 percent in 2017 (Shen, 2024). When Tsai entered office in 2016, Taiwan's export reliance on Hong Kong and mainland China was 40.1%; the NSP's early economic phase did little to change this percentage. However, the NSP approach was not solely responsible for this shift; other outside variables also had an impact (Shen, 2024). Economic integration with Southeast Asia "is more evident in outward investment than in exports," according to a National Bureau of Asian Research (2018) report, further demonstrating the limited penetration of these policy tools. When taken as a whole, these numbers imply that trade-based involvement is not enough to accomplish Taiwan's more general regional integration objectives, implying pressure to look into other channels of influence (Tso & Jung, 2018).

Beyond trade performance, the data also points to deepening domestic structural challenges. A report from the Taipei Times explains that the number of students studying in STEM fields—including undergraduate, master's, and doctoral students—decreased by 17.15.

percent from 2012 to 2021. Similarly, the number of graduates dropped by 21.31 percent from 2011 to 2020 (Chinghsuan & Liu, 2023). The waning interest among young people in STEM fields poses a distinct challenge for the Taiwanese government, as it risks losing more experts and young talent in these sectors. This context can also be interpreted as the

primary driver behind Taiwan's growing emphasis on recruiting and retaining Southeast Asian students as part of its long-term workforce and talent strategy (Zhang, 2025)

The reorientation based on this data—specifically the deliberate shift toward education as a foreign policy tool during the 2019–2025 period—is what this study aims to analyze through the lens of soft power, as proposed by Joseph S. Nye. According to Nye, culture may be used as a form of soft power when a nation's identity, values, and customs can persuade people to interact with it voluntarily. In this perspective, culture encompasses more than just art and popular customs; it also involves scholarly interchange, education, and historical narratives that influence public opinion (Joseph S. Nye, 2004). A major strategic change is shown when Taiwan's New Southbound Policy (NSP) for the 2019–2025 era is examined using Joseph Nye's soft power paradigm. In this stage, Taiwan deliberately emphasizes culture—especially through the education sector—as its main source of appeal rather than depending only on economic tools. According to Nye, culture is a collection of beliefs and customs that give society purpose and may be found in both popular and high culture, including education (Joseph S. Nye, 2004). Taiwan's use of this high-culture aspect as a strategic tool in its foreign policy is exemplified by the NSP during this time.

The presentation of education as a key soft power asset is one of the most obvious examples of this strategy. Nye highlights that education is very appealing since foreign students who study in a nation typically gain a stronger comprehension of its institutions, social structures, and values. Taiwan has changed its emphasis from broad educational exchange to attracting top talent in strategic industries like semiconductors and STEM in the context of the 2019–2025 NSP. Initiatives like INTENSE, which was introduced in 2024,

are an example of how Taiwan's educational system is being positioned as a prestigious and internationally competitive kind of high culture. This is done in an effort to draw in top talent who not only study but also have the potential to join Taiwan's industrial ecosystem.

Additionally, by means of student exchange and direct engagement, this technique enhances cultural transmission processes. According to Nye, one of the best methods for creating a reservoir of goodwill—that is, a collection of favorable opinions about a nation—is through direct interaction. The "study and stay" policy, which has been reinforced since 2019, is an important tool in this regard because it not only encourages foreign students to study in Taiwan but also to remain and find employment after graduation. Long-term preferences and policy orientations that are in line with Taiwan's interests are shaped by this process, which facilitates a deeper internalization of Taiwan's social, cultural, and professional values.

The NSP's use of language as a soft power tool is another example of its cultural component (Joseph S. Nye, 2004). Language serves as a means of spreading cultural values and identity in addition to being a tool for communication. Taiwan's methodical attempts to advance Mandarin as a cultural bridge are exemplified by the introduction of the Mandarin Education 2025 Program in 2022. By improving their language skills, foreign students not only learn new languages but also have more access to Taiwanese norms, values, and social customs. In the end, this fosters cross-cultural connections that are more natural and long-lasting than those that are based only on business dealings.

Furthermore, Taiwan's soft power strategy heavily relies on trustworthiness. According to Nye, credibility is a very significant resource in a world where information moves quickly. The global community is more likely to find a culture that is transparent, open, and trustworthy

appealing. A move toward a Government-to-Government (G2G) collaboration model is represented in the NSP 2019–2025, including the creation of the INTACT Base in 2024. This strategy not only strengthens the legitimacy of policies in the eyes of partner nations like Indonesia, but it also upholds the institutionally acknowledged quality, integrity, and transparency of Taiwan's educational system.

Overall, since 2019, the NSP has developed into a policy firmly anchored in cultural dimensions, particularly through higher education and language, whereas Taiwan relied more on economic soft power through trade and investment during the 2016–2018 period. Taiwan has successfully created an appeal that is persuasive rather than coercive—in keeping with Nye's concept of soft power—by incorporating foreign talent into its domestic education system and industries. This approach encourages other actors to voluntarily adopt values, goals, and developmental directions that align with Taiwan's interests, particularly in the areas of technological advancement and regional stability.

4. Conclusion

Overall, from 2016–2018 to 2019–2025, Taiwan's New Southbound Policy (NSP) changed, moving from a primarily economic focus to a strategic emphasis on talent development and education. The NSP's initial goals were to diversify markets and lessen reliance on mainland China, but its economic contributions had little effect on total exports, suggesting that regional integration was only partially successful. NSP Version 2.0, which represents the 2019–2025 phase, places a heavy priority on high-tech education, particularly in STEM subjects, in order to match industrial demands with labor preparation. This combination of education, labor market demands, and Taiwan's economic strategy is demonstrated by initiatives like the study and stay program and G2G partnerships. As a result,

education is a vehicle for both international talent attraction and exchange.

Taiwan's change shows a move from economic to cultural sources of attraction, including high culture like education and language, when examined by Joseph Nye's paradigm for soft power. Taiwan used education to spread principles and cultivate goodwill among international students during the second phase of the New Southbound Policy (NSP). By building persuasive ties, tactics like "study and stay" and Mandarin promotion improve social integration and promote long-lasting preferences among people familiar with the Taiwanese system, establishing education as a more sustainable soft power tool than trade.

Additionally, a number of structural constraints are responsible for Taiwan's shift away from an economic approach to education. The low success of trade and exports from the outside indicates that economic policies are limited in their ability to change dependency patterns. The competitiveness of the IT industry is threatened by a talent problem brought on by a drop in STEM graduates. In order to address the dearth of trained workers, the government thus seeks to draw in foreign expertise, particularly from Southeast Asia. The New Southbound Policy (NSP) has evolved as a practical reaction to these constraints, presenting the NSP as a tactic that strengthens Taiwan's soft power in addition to its national economic defense strategy by integrating industrial, demographic, and global influence goals

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