

## Operation Directions Governing Ministry of Education Subsidies for Universities and Colleges to Recruit Internationally Outstanding People

1. Ministry of Education Order Tai Jiao Gao (5) Zi No. 1070148981B: entire text of eight articles promulgated on October 9, 2018, with effect from August 1, 2018.
2. Ministry of Education Order Tai Jiao Gao (5) Zi No. 1070197450B issued on January 10, 2019: Amendments to all eight articles, with immediate effect.
3. Ministry of Education Order Tai Jiao Gao (5) Zi No. 108019623B issued on January 15, 2020: Amendments to all eight articles, with immediate effect.
4. Ministry of Education Order Tai Jiao Gao (5) Zi No. 1090154169B: Amendments to “Operation Directions Governing Ministry of Education Subsidies for Universities and Colleges to Recruit Internationally Outstanding People” issued on November 17, 2020, with immediate effect.
5. Ministry of Education Order Tai Jiao Gao (5) Zi No. 1112200096A issued on January 21, 2022: Amendments with immediate effect.
6. Ministry of Education Order Tai Jiao Gao (5) Zi No. 1122201070A issued on May 19, 2023 with immediate effect.

1. These Directions have been formulated to assist universities and tertiary colleges (hereunder referred to as “tertiary institutions” and as “universities”) to attract and recruit internationally outstanding academics to Taiwan to teach by providing internationally competitive salaries and benefits so that their knowledge and expertise can take root in Taiwan’s academic environment and increase the international impact of Taiwan’s higher education.
2. Candidates’ eligibility criteria: The internationally outstanding people being recruited by universities are divided into the categories Yushan Fellows, Yushan Young Fellows, and World-class Scholars. In principle, each scholar applies to one university. The eligibility criteria for each category are as follows:
  - 1) A Yushan Fellow meets one of the following criteria:
    - (1) The person has worked at a leading international research institution or an internationally renowned company for at least ten years, has an international academic reputation or cutting-edge expertise in a core technology, and has experience leading an academic or industry research team;
    - (2) The person is a recipient of a Nobel Prize, a fellow of a national academy, or of a major international association, or has received some equivalent recognition;
    - (3) The person has made an outstanding contribution in their academic or industry field in the past five years.
  - 2) A Yushan Young Fellow has received their highest academic qualification

within the last ten years or is 45 years old or younger and meets one of the following criteria:

- (1) The person has worked at a leading international research institution or an internationally renowned company for at least five years and has great potential;
  - (2) The person has experience conducting major research projects;
  - (3) The person has made an exceptional contribution in their area of academic expertise in the past five years.
- 3) A World-class Scholar is a person who meets one of the criteria listed above for Yushan Fellows or Yushan Young Fellows but did not pass the selection review. They have the capacity to develop further and have been, or will be, appointed by the university and receive a flexible salary and benefits with funding from the Higher Education SPROUT Project, or using other independently-raised funds (the university shall provide clear details in its application).

The scholars referred to in the previous paragraph are not permitted to be currently employed as a full-time employee within the staffing complement of a university or academic research institution in Taiwan who has held their position for a year or more, or to be a retiree from a university or academic research institution. Applications for persons who have held such a position for less than a year are restricted to persons who have not previously had an application related to them made under the Yushan Fellow Program. Scholars in the categories referred to in the previous paragraph are not permitted to apply to also receive any other form of flexible salary funded by subsidies provided by the Ministry of Education (abbreviated below to “the Ministry”).

### 3. Fellows' tasks:

- 1) Applications shall be for the fellow to undertake project tasks listed below (select at least two of the four items):
  - (1) Academic research: enhance the university's academic research capacity and benefit its further development;
  - (2) Teaching innovation: innovate and refine teaching practices, intensify the training of highly skilled professionals, and improve the quality of teaching;
  - (3) International collaboration: boost international exchanges and connections, and enhance Taiwan's international influence and reputation;
  - (4) Industry-academia collaboration: assist industry-academia collaboration between the university and enterprises in Taiwan and

overseas, train high-level professionals, and deepen the social impact of such collaborations.

- 2) In addition to the tasks listed in the previous subparagraph, each Yushan Fellow shall form a team with teaching and research personnel at the university and jointly carry out teaching and/or research projects, making use of their overseas academic resources for collaboration and exchanges. The team shall include at least one staff member at or below associate professor level or postdoctoral research fellow at the university. Fellows shall also put their international academic network resources to good use to assist the internationalization of the university where they are working, promote international exchanges and collaboration, and assist with activities to publicize the Yushan Fellow Program overseas, and build bridges for recruiting outstanding international academics. The necessary funds and resources shall be provided by the university where they are working.
4. Subsidy funding
    - 1) For Yushan Fellows:
      - (1) In addition to the statutory salary, up to NT\$5 million each year is approved for a period of three years. If a person is on a short-term exchange, the amount is proportionate to the length of time they work at the university.
      - (2) Provision of up to NT\$1.5 million each year for academic exchanges and work expenses is approved for a period of three years. These funds may be used for expenses associated with their undertaking teaching, research, international academic exchanges, and work associated with their plan. If these expenses include personnel costs (such as salaries of one or more administrative assistants, postdoctoral research fellows, or part-time assistants), the costs will be handled in accordance with the standards formulated by each university, and universities will be reimbursed after their claims have been verified.
      - (3) Each university may allocate 20% of the total approved amount it receives for academic exchanges and work expenses as capital account funds and allocate funds from the capital account to the fellows in their university based on each fellow's needs.
      - (4) The amount paid to the Yushan Fellow on a short-term exchange program in addition to their statutory salary is calculated prorata, based on the length of time they spend working in Taiwan. But the

subsidy for academic exchanges and work expenses is not subject to this and when the subsidy funds are paid and may be used is not limited to times when they are in Taiwan.

2) Yushan Young Fellows:

- (1) In addition to the statutory salary, an annual salary allowance of up to NT\$1.5 million is approved for a period of five years.
- (2) Provision of up to NT\$1.5 million each year for academic exchanges and work expenses is approved for a period of five years. This funding may be used for any expenses associated with teaching, research, international academic exchanges, and work undertaken by a fellow as they implement their plan. If these expenses include personnel costs (such as salaries of one or more administrative assistants, postdoctoral research fellows, or part-time assistants), the costs will be handled in accordance with the standards formulated by each university, and universities will be reimbursed after their claims have been verified.
- (3) Each university may allocate 20% of the total approved amount it receives for academic exchanges and work expenses as capital account funds and allocate funds from the capital account to the fellows in their university based on each fellow's needs

3) World-class Scholars:

- (1) The Ministry will conduct audits of universities, regarding how their recruitment of world-class scholars relates to each university's development and the supportive measures, and select outstanding universities. The Ministry will separately approve provision of up to NT\$1.5 million for academic exchanges and work expenses for a period of one year for each world-class scholar at each such a university, and the university may allocate this funding among those scholars. The funds may be used for expenses associated with their undertaking teaching, research, international academic exchanges, and work associated with their plan. If these expenses include personnel costs (such as salaries of one or more administrative assistants, postdoctoral research fellows, or part-time assistants), the costs will be handled in accordance with the standards formulated by each university, and universities will be reimbursed after their claims have been verified.
- (2) Each university may allocate 20% of the total approved subsidy it receives for the expenses outlined above as capital account funds and

allocate funds from the capital account to the scholars in their university based on each scholar's needs.

Other related matters not covered above shall be handled in accordance with the Operation Directions Governing Approval, Issuance and Reporting of Ministry of Education Subsidies (Donations) and Commissioned Funds and central government regulations governing expenditure appropriations.

5. The role of the university:

Item	Yushan Fellows	Yushan Young Fellows
Appointment Method	<p>The university shall use one of the following methods:</p> <ol style="list-style-type: none"> <li>1. Appoint the Yushan Fellow as a full-time teacher within the staffing complement. However, a person older than 65 years at the time of their appointment may be appointed fulltime outside the staffing complement.</li> <li>2. Short-term exchange teaching and research personnel shall be appointed for at least three years and work at the university for at least three months each year coordinated with the mid-term review schedule.</li> </ol> <p>If a person is for some reason unable to work a full three months in the second year, the person shall complete the remainder of those three months within the three years of the project. If a person is unable to do so within the three</p>	<p>Appoint as a full-time teacher within the staffing complement.</p>

	years, this will be taken into consideration when the Ministry makes follow-up quota allocations to the university.	
Statutory Salary & Benefits	Provide salary and benefits—basic salary, research allowance, and supervisor allowance— that are not lower than the statutory salary and benefits for a teaching position at the same level at a national university.	
Supportive Measures	Provide funding and equipment necessary for teaching and research; personnel expenses for administrative, or teaching, and research assistants; airfares for teachers and their family members; accommodation and relocation expenses; and assistance with children's education matters. The university may pay the necessary expenses for these measures using independently-raised funds and/or subsidies from government agencies. The criteria for associated payments and their use are handled in accordance with the regulations of the university or the regulations of government agencies regarding subsidizing expenses.	
Directions Governing Appointments	<ol style="list-style-type: none"> <li>1. The university shall complete the appointment procedure by August 1 of the following academic year. A university that fails to complete the appointment procedure by the deadline will be deemed to have voluntarily given up their quota.</li> <li>2. The Ministry will publish a list of the fellows whose appointments have been confirmed on the Yushan Fellow Program website.</li> <li>3. If any future academic research findings of a full-time Yushan Fellow or Young Yushan Fellow are published during the period of their appointment, they shall include the name of their host university in Taiwan and acknowledge that the research was funded by the Yushan Fellow Program of Taiwan's Ministry of Education. If a short-term exchange fellow has any academic achievement that their employment agreement with their host university stipulates as a duty or item, the short-term exchange fellow shall include the name of their host university in Taiwan and acknowledge that the research was funded by the Yushan Fellow Program of Taiwan's Ministry of Education.</li> </ol>	

6. Quota allocation method:
  - 1) The quota units for universities that received subsidies of NT\$50 million or more under Part 1 of the Higher Education SPROUT Project (for implementing teaching innovation, developing features of the university, and increasing higher education accessibility, promoting the university as a social responsibility hub, and making university resources more public) to apply for are allocated ranked on the basis of the proportion of their funding and their research centers in each academic field in the First Part and the Second Part of the Higher Education SPROUT Project. Quota units for other universities to apply for will be approved each year in accordance for projects necessary to implement Ministry policies.
  - 2) When the quota units referred to above are calculated, a Yushan Fellow is counted as one unit, and a Yushan Young Fellow is counted as one-third of a unit.
  - 3) A university that does not lodge an application in a particular year will be deemed to have given up their quota. If a university's application is not approved by the Ministry, its quota will not be returned to it.
  - 4) The numbers of Yushan Fellows and Young Fellows who have applied for a subsidy renewal are not included in the quotas allocated by the Ministry for the year.
7. Reviews:
  - 1) Review process:
    - (1) Reviews are conducted once a year coordinated with the academic year and semester operations.
    - (2) A review committee is set up and a convener is designated for each of six academic fields: humanities and the arts, social sciences, science, medicine, engineering, life sciences, and agriculture. Each convener recommends scholars and experts in their respective fields to undertake anonymous reviews of the applications.
  - 2) Key points examined:
    - (1) Experience and achievements of the candidate the university proposes to appoint (significant academic contributions, academic awards received, major research findings, curriculum vitae, and a list of their publications; Yushan Fellows are asked to provide a list of their publications in the last ten years, and Yushan Young Fellows are asked to provide a list of their publications in the last five years).
    - (2) How the proposed appointee's future academic work relates to the university's development (including the Higher Education SPROUT

Project), and the expected benefits:

- a. The fellow's academic work plan and goals;
  - b. The fellow's academic work and how this is connected to the university's development (including the Higher Education SPROUT Project)
  - c. Their specific approach to academic work
  - d. Plan and method for undertaking the tasks set out in Article 3 (give details of at least two selections).
  - e. Anticipated results (expected tangible quantitative or qualitative outcomes)
- (3) Supportive measures and arrangements that the university will provide (for example, research expenses and equipment, personnel expenses for one or more research assistants, accommodation and relocation expenses, and assistance with children's education matters. The university may pay these expenses using independently-raised funds or subsidies from government agencies.) If the university provides supportive measures related to its collaboration with any enterprises, such as laboratory facilities, jointly organizing research and development teams, or funding, it is requested to provide explicit details of these.
- (4) Reasonableness of the salary and benefits provided (for example, the method used to evaluate the university's application for a Ministry subsidy for additional salary above the statutory amount, and the amount of subsidy applied for to pay administrative and operating expenses and how it will be used; each university is requested to also include details of the statutory salary it will provide.)
- (5) Team collaboration setting-up and planning (A Yushan Fellow who is appointed shall set up a team with teaching and research personnel at the university; the team members from the university shall include at least one staff member at or below associate professor level or postdoctoral research fellow at the university. Yushan Young Fellows are not required to do this).
- 3) Standards for passing a review: A Yushan Fellow's academic skills and ability shall at least be of the standard required to win an Academic Award from the Ministry; a Yushan Young Fellow shall have academic ability of the standard required to win to win a Wu Ta-You Memorial Award from the National Science and Technology Council, or the potential to do so in future. A Yushan Fellow who has made significant contributions to industry

research and development shall at least meet the criteria to receive a Ministry of Education National Award for Distinguished Contribution to Industry-Academia Cooperation and shall also meet one of the following criteria:

- (1) The person's professional competencies shall be "internationally competitive" or have had significant influence on national industry development.
- (2) The person's professional competencies can be combined with and complement the existing strengths of the university or of the region, with supportive measures provided by the university, and the university's participation in cooperative teams with industry (enterprises).

8. Program implementation review:

1) Plan duration: Subsidies for Yushan Fellows are approved for a period of three years and subsidies for Yushan Young Fellows are approved for a period of five years. An application may be made to renew the subsidy at the end of the implementation period (one time only).

2) Yushan Fellows and Young Fellows who receive a subsidy under this program shall submit the regular reports listed below:

- (1) Annual performance reports: Submit annual performance reports and upload them to the Yushan Fellow Program website.
- (2) Mid-term reports: Yushan Fellows shall submit a mid-term report at the end of the first year of implementation; Yushan Young Fellows shall submit a mid-term report at the end of the second year of implementation. Mid-term reports may be submitted together with the annual performance report. Yushan Fellows may submit the published results of their work that were presented at an academic conference organized by the Ministry or by a body commissioned by the Ministry instead of a mid-term report.
- (3) Final reports: Yushan Fellows and Young Fellows may submit their final report together with a renewal application six months before the end of their program period; Yushan Fellows and Young Fellows who do not intend to apply for a renewal shall submit their final report when their program period ends.

3) The university shall submit the final reports of its World-class Scholars after the end of the program period for the current year.

4) Review of the reports:

- (1) Annual performance reports will be made public on the Yushan

Fellow Program website after an administrative review.

- (2) Review committees will be set up to review the mid-term reports, and a convener and several reviewers will be designated for each of the six academic fields: humanities and the arts, social sciences, science, medicine, engineering, and life sciences, and agriculture.
  - (3) The Ministry will send the final reports together with the renewal applications to the conveners for each discipline and to experts and scholars to review. Final reports from Yushan Fellows and Young Fellows and World-class Scholars who do not intend to apply for a renewal shall be handled in accordance with the review process for annual performance reports.
  - (4) The key focus of the reviews is on each person's research, teaching, and work performance, and on the aims of the tasks to be undertaken specified in the university's application and the results of the implementation of its support mechanisms.
- 5) Results of Report Reviews:
- (1) Mid-term reports: If a Yushan Fellow or and Young Fellow fails to achieve their anticipated results, the university will be asked to play a part in improving the situation and a copy of the reviewers' comments will be attached. Details of the improved situation are to be incorporated into the final report and it will be one of the items examined during any renewal application review. This will also be taken into consideration by the Ministry when in future quota allocation to the university and in adjusting the subsidy to the university for the remaining term.
  - (2) Final reports: The final reports submitted by Yushan Fellows and Young Fellows, together with their renewal applications, will be considered by the Ministry when it is determining whether to approve funding for a subsequent term. The Ministry will do so three months before the end of their respective current appointments. The final reports of Yushan Fellows and Young Fellows not applying for a renewal and of World-class Scholars will be used by the Ministry as reference material when their university applies for a follow-up quota allocation.
9. Other matters:
- 1) Universities may formulate their own internal rules regarding the matters that the provisions of Article 5 state that they shall be responsible for.
  - 2) Yushan Fellow Program Funds are approved and allocated annually, but the

reporting time is coordinated with the mid-term review schedule. Funds that it was not possible to fully use, or any outstanding debts or contractual responsibilities may be carried over in accordance with the following provisions regarding the schedule and incorporated in the fund budget for another year (public universities are not permitted to place any annual cash surplus into a university endowment fund) and carried-over funds shall be used for their original purposes; it is not permitted to use them for other purposes. The balance of the program funds shall be returned in full:

- (1) Yushan Fellows shall report their funds in the first year and in the third year (funding that has not been fully spent in the second year may be carried over and used in the third year).
  - (2) Yushan Young Fellows shall report their funds in the second year and the fifth year (funding that has not been fully spent in the first year may be carried over and used in the second year, and funds that have not been used in the third and the fourth years may be carried over and used before the end of the plan implementation period in the fifth year).
  - (3) Other matters not covered herein shall be handled in accordance with the Operation Directions Governing Approval, Issuance and Reporting of Ministry of Education Subsidies (Donations) and Commissioned Funds and central government regulations governing expenditure appropriations.
- 3) Any case of a violation of academic ethics by a fellow receiving funding from the Yushan Fellow Program shall be handled in accordance with the provisions of the Directions Governing the Handling of Academic Ethics Cases at Junior Colleges and Higher Level Educational Institutions.
- 4) If, after their funding has been approved or during the period of their appointment, the behavior of a fellow who will receive or is receiving funding from the Yushan Fellow Program involves a violation of gender equity or is in breach of any other ordinances, the Ministry may halt the payment of their subsidy, if the circumstances warrant it.