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INTRODUCTION

Introduction: Experts in Imperial China in Sociological Terms

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This special issue, "On Their Own Terms: Experts in Imperial China," examines various kinds of expertise from Han times into the twentieth century from the angle of practitioners themselves, and sometimes even on their own terms.[1]

Historians of China have overwhelmingly understood Chinese society as venerating one kind of expertise—literati bookish knowledge and scholarly skills—above others, especially from the Song dynasty onwards. Literati and bureaucrats' near-monopoly on the production of texts means that even when historians study other experts, the voices of the state and the scholarly elite dominate. Nevertheless, in the case of artisans, scholars like Dagmar Schäfer, Anne Gerritsen, and Dorothy Ko have demonstrated that the knowledge and authority of non-writing experts must have been accepted by scholar-official overseers for production to succeed.[2] Likewise, when historians think concretely about how interactions in the workspace must have proceeded to obtain outcomes that did occur, we can see that other kinds of experts also wielded authority in the workspace.

Taking the perspective of the experts rather than of the state and the literati challenges many assumptions regarding knowledge, skills, and personal character. The new understanding of experts' ability pushes us to rethink categories of knowledge and division of labor (Morgan, Yang, Papelitzky), social and political relations (Schneewind, Brown, Mukherjee), the transmission of information and knowledge (Li, Rossabi), and the question of whose judgement of ability counted (Robinson).

This authority based on ability took several forms. The analytical concepts of the Chicago-school sociology of work help to make connections across various occupations.[3] "Practitioners" within a given occupation are understood as one another's "colleagues," those who share "technique" (the whole bundle of knowledge and skills required) and

[1]This special issue springs from the working group "Ability and Authority" at the Max Planck Institute for the History of Science, Berlin, 2020–2023, under the leadership of Dagmar Schäfer.

[2]Dagmar Schäfer, "Silken Strands: Making Technology Work in China," in *Cultures of Knowledge: Technology in Chinese History*, edited by Dagmar Schäfer, 45–73 (Leiden: Brill, 2012). Anne Gerritsen, *The City of Blue and White: Chinese Porcelain and the Modern World* (Cambridge: Cambridge University Press, 2020). Dorothy Ko, *The Social Life of Inkstones: Artisans and Scholars in Early Qing China* (Seattle: University of Washington Press, 2017).

[3]For an introduction to the central concepts in occupational sociology, see Everett C. Hughes, *Men and Their Work* (Glencoe, IL: The Free Press, 1958) and Sarah Schneewind, *The Social Drama of Daily Work: A Manual for Historians* (Amsterdam: Amsterdam University Press, 2024).

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"object of technique" (what that knowledge and those skills operate on). Some practitioners within an occupation might have had authority to direct and judge colleagues lower in the "hierarchy of the occupation," in accordance with "code:" shared regulations and procedures generated within the occupation, rather than imposed from outside. Laypeople and "clients," including officials or other members of the ruling class, might also have granted practitioners the social "license" to live differently from others, to judge their own qualifications, and to manage technique in the workspace as they saw fit. License might be granted even when—or especially when—technique necessarily included "guilty knowledge": knowledge required by an occupation that might endanger practitioners, clients, other laypeople, or the ideological foundations of society or the state. Practitioners in some occupations might even have possessed what is called "mandate": the social agreement that they could tell clients and other laypeople how to behave with respect to the object of technique, or even how to think about it. Mandate extends the authority of the practitioners outside the workspace itself.

But even when authority is limited to the workspace, it may lead historians to rethink life experience under social and political structures of domination. Since most people in China spent most of their time working until rather recently, experiencing themselves as experts in the workspace, even when they were practitioners low in the hierarchy of their occupation, must have meant that their experience of "social status" was neither unitary nor overwhelming. Considering this, as well as the far-reaching social networks that some of these articles reveal, historians should perhaps rethink the analytical utility, not only of the hackneyed quadripartite division of Chinese society into scholars, farmers, artisans, and merchants, but even of the concept of "social status" itself.

Each article focuses on one group of experts—astronomers and mathematicians; Buddhist sculptors; maritime navigators; translators and interpreters; military men; bondservant accountants and doormen; surveyors for Qing officials and Tibetan kings. In addition to concrete technique and object of technique, shared questions include: What knowledge, skills, and social relationships defined expertise? How was expertise cultivated and evaluated, and by whom? How did expertise cross steppes, seas, mountains, generations, and class lines? Approaches include textual study, the study of objects and images, and digital humanities. We place expertise in the context of the physical, organizational, social and political settings of work.

Daniel Patrick Morgan opens the issue with the most novel methodology applied to the oldest time period. His article makes a fitting start because his key question "An expert in *what*?" flags the need to start studying any given occupation with an open mind about its parameters, defined in the first instance by technique and object of technique. Pointing out that early-imperial men generally known as astronomers and mathematicians also wrote in the genres of poetry, history, and classical scholarship, he offers a digital-humanities analysis of the technique, object of technique, and social authority of the two fields by following the experts. His results show that while fewer biographies were composed for early imperial scientists than for other authors, there were many *more* written works in the categories of astronomy, mathematics, the five agents (or phrases), and medicine; of those, we are more likely to know the putative authors of the math-heavy and theoretical works than of works on divination and medicine. Morgan invites other scholars to explore his database to follow particular authors from one set of texts to another, as a way to see emic definitions of expertise (whether of an occupation or of skilled amateurs who substantially contribute to a field) through the lens of where ability lay and who wielded intellectual authority, all within a complex social field. As Morgan demonstrates, historians using sociological categories of analysis must both attend to

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actors' categories and stand ready to decenter them to approach a zoomed-out view of the knowledge of a given place-time. Finally, Morgan's article demonstrates the value of new methods in both raising and answering questions.

Morris Rossabi takes up the topic of interpreters and translators needed to govern China's successive empires. Before the Yuan period, they were mainly private individuals rather than government personnel. Visitors to the Mongol rulers, as well as their captives, spoke a wide range of European and Asian languages. To deal with its large, multi-lingual territory, the regime first tried to impose the imperially commissioned 'Phags-pa script to unite all subjects linguistically, but failed (despite teaching the script in schools and using it on imperial steles and a range of objects including passports and licenses). Instead, the Mongols, in just one example of their respect for experts, recruited speakers of many languages, and recognized their abilities with bureaucratic rank up to 4a. As well as Muslims and former Liao and Jin subjects who spoke Chinese, interpreters of Turkic languages, Iranian, and Korean came to China from other parts of the Mongol territory. The Mongols also created new institutions to educate and house interpreters and translators. The Ming followed suit, as in so many aspects of government (including astronomy, discussed by Qiao Yang in this issue), establishing academies for both translators and interpreters, but paid them less and lowered their rank. The court relied on them—particularly on Mongols and on eunuchs—for information on and mediation with foreigners. Given the accuracy of surviving translations and the admiration of visiting foreigners for the interpreters' skills, we might interpret literati and court complaints about the corruptibility of translators and interpreters as a typical expression of any client's distrust of an expert on whom he relies, whom he must grant license to hold "guilty knowledge": in this case knowledge of language and culture that practitioners could potentially have used against state interests, especially in negotiations, when they might slightly mispresent what was said.

Qiao Yang focusses on the Jin–Yuan period, studying another group of experts who possessed guilty knowledge, this time in the form of understanding of the correlations of the cosmos with the state. While it is well known that imperial China exercised top-down bureaucratic control over this knowledge, a rare Yuan-era document and the experiences of a few Yuan astronomers reveal details about the pathway into this occupation. Students in the five sections of the Bureau of Astronomy—omen astrology, mathematical astronomy, board divination, quantitative observation, and timekeeping—were respectively selected and promoted based on their physical, technical, and literary skills. While training largely took place within astronomer and commoner families, the Bureau of Astronomy retained the authority to license guilty knowledge by controlling texts, drawing disciplinary boundaries, and encouraging hereditary succession within the profession.

Just as the Yuan regime welcomed Uyghur and Muslim experts into China by, so Chinese expert sculptors travelled to Japan for particular projects, sometimes settling there for good. Yiwen Li traces four late-twelfth-century stonemasons from Ningbo who were recruited to guide aspects of the reconstruction of the prestigious Tōdaiji monastery in Nara after the Genpai War. In addition to bringing their sculpting skills to the project, these artisans also facilitated the importation of stone (in the form of half-finished sculptures) from around Ningbo such as they were used to working with, and introduced new tools and techniques. Texts, archeological reports from the mainland quarries, and the appearance of the Tōdaiji sculptures together show that temple patrons, monks, merchants, and artisans of both countries were all part of a network of (mostly nameless) experts. Although family and native place mattered on the path into the occupation,

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colleagues in the same occupation and coworkers (those in the same workspace, but different occupations) also cooperated and competed across national and linguistic boundaries. While one Ningbo sculptor settled permanently in Japan, his family maintained some of their trademark stylistic elements. The crossover of Ningbo stone and style shows that Japanese clients accepted sculptors' judgements with respect to their technique and object of technique: they had license to manage their work and mandate to tell clients how to think about their services.

Likewise, David M. Robinson shows that even while Ming civil officials expressed deep distrust of military officers (whose required, licensed guilty knowledge of warfare potentially endangered the regime), they understood how the style of command affected troop morale, and thus undergirded the fighting capacity on which the dynasty's survival depended. In the wake of the Tumu Crisis of 1449, writings by two officials, the junior Ye Sheng (1420–72), and the senior Yu Qian (1398–1457) illustrate how military ability was defined, cultivated, assessed, and rewarded. While civil officials might presume to judge moral capacity, only those who had themselves mastered technique—knowledge of terrain, logistics, tactics and strategy, regional customs, and personnel management and skills in weaponry, horsemanship, and so on—could judge colleagues' abilities, courage, resource, and intelligence. So, by the late fifteenth-century, senior commanders, officials from the Ministries of War and Personnel, and censors met to assess and appoint officers drawn from among the merit nobles and military households. Because even civil officials understood the critical role of commanders' technique in assessing their men and managing relations with them in the context of real, daily dangers and hardships, civil officials' writings even offer some insight into the broader work experiences of those who fought for a living. Commanders, for instance, cared about the visible support of those they commanded, and they won that by adhering to colleague code: to military values of ferocity and generosity, boldness balanced with pragmatism, and material patronage. Civil officials, in selecting and promoting military officers, had to take into account occupational code that reached far down the hierarchy of the occupation: ordinary soldiers. To the extent that these clients and laymen accepted code as the outward face of the occupation, we should classify it as "policy."

Another case in which the subaltern wields expert authority, including to pass judgment on others, occurs in the widely publicized high-Ming *Family Admonitions of Huo Weiya*, by Jiajing-era Minister of Rites Huo Tao (1487–1540). Sarah Schneewind looks at the kinds of experts required by Huo Tao's extended co-habiting family of about one hundred members. Some of the specialized roles within the lineage were filled by members of the lineage. Others, however, were enslaved bondservants and hired laborers with low legal status. As accountants, controllers of seed and fertilizer, and doorkeepers, these outsiders held authority as intermediaries between lineage members and the lineage leadership, including ancestors. Their judgements with respect to their object of technique were accepted by lineage leaders because of their expertise, so that even these lowly bondservants possessed license.

To conduct the bustling maritime trade now well-recognized by historians required not only merchants like those discussed by Yiwen Li, but competent sailors and navigators, as Elke Papelitzky investigates. The navigators' expertise went far beyond the specifics literati recorded in the rutters or sailing manuals that historians have said they relied on, nor was using the much-vaunted compass a simple process. Navigation calculation was carried out by a group of "*huozhang*" (in the Zheng He voyages these included both Chinese people and foreigners) working in shifts and cooperating closely with co-workers whose technique included managing the rudder, the ropes, the anchor,

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and so on. Charts and compasses could only do so much. Navigators had to understand sun and stars, soundings, weather, the geography of the land as seen from the sea, the smell and color of different sands and waters, and rituals including deity worship. Although ship masters oversaw the management of personnel and business, navigators made the decisions at sea and everyone had to accept their authority or risk disaster. They held mandate.

Tristan Brown turns attention back to the state. He argues that in Qing times low-ranking officials in the counties played crucial roles in governance, frequently serving as key representatives of the state to the people. Focusing on Yin-yang Officers, Brown shows how their ritual work strengthened state power and legitimacy. Instituted in Yuan times, Yin-yang or geomancy officers used the imperial calendar to choose auspicious times for government actions, performed eclipse rituals, fought heterodoxy, attended state examinations, and so on. They were remunerated by the stint, rather than receiving a regular salary, and worked for private citizens while still holding office: thus, the state could cheaply gain legitimacy by allying with these experts, who held the mandate from local people on what to do and what to think with respect to lucky places and times for marriages, funerals, and building projects. The occupation's license to determine its own membership appears in the fact that while practitioners had to be familiar with the imperial calendar and a key text on divination, there was no fixed imperial curriculum, and some yin-yang masters wrote their own guidebooks. Further, the path into the occupation was often hereditary. On the other hand, the state's imprimatur strengthened their authority, and when it came to empire-wide rituals such as the "Arrival of the Spring Solar Term," they followed the calculations made by their colleagues higher up in the hierarchy of the occupation, at the Bureau of Astronomy in Beijing. Brown argues that the state protected itself by diluting the influence of any one ritual occupation by involving Buddhists and Daoists, shamans, and geomancers in its ritual work. But this shared work must also have enabled each occupation to shuffle off some blame for failures—mistakes at work—onto coworkers in different occupations. Brown's work shows that an occupational perspective deepens our understanding of state-society relations.

Sayantani Mukherjee demonstrates clearly how license, mandate, and other aspects of the social drama of work are embedded in particular societies. When states and their subjects clash, occupational competition results, along with other kinds of competition more frequently studied. Mukherjee shows the purposeful appropriation of local lived knowledge by two different sorts of geographical expert simultaneously exploring the rivers and mountains of the late-Qing Himalayan borderlands: Tibetan treasure-discoverers (tertöns), and imperial Qing military surveyors. Buddhist treasure-discoverers drew on visions with roots in older Tibetan understandings, including older books, to create time-crossing texts about hidden valleys of spiritual wealth; writing and publication of these guidebooks peaked just when the British and Qing were most interested in Tibet and the Himalayas. The guidebooks urged Buddhists to invade and settle the savage mountains and valleys to spread Buddhism, so the treasure-discoverers sent refugees from Qing expansion as pioneers into British-Indian territory. As the same time, Qing surveyors relied on local knowledge as they systematized knowledge of Tibet as a cultivatable, taxable space. Their reports and maps followed a set format that included longitude and latitude and specific natural and manmade features. Like the Tibetan tertöns, Qing surveyors relied on the knowledge and services of local guides whom their reports neither named nor credited. In each case, surveying in the name of creating a new order relied on local people deeply steeped in the old order, and the three created competing texts and visions of the same space that valorized different expert techniques.

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The claims to license and mandate, and denials and erasures of those claims, overlapped in complex layers. The technique that set surveyors apart was not their knowledge of the landscape and its uses but their mastery of forms of presentation of knowledge that were legible outside to the metropole.

We hope that the articles in this special issue will generate new understandings of the roles of these particular experts in Chinese history. We also hope to inspire our fellow historians of society, knowledge, and work to undertake new readings of old sources and the use of new sources, and perhaps to facilitate comparisons and contrasts across place-times and occupations by use of a shared set of concepts and terms.

Competing interests. The author declares none.

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