

Taiwan's Foreign Policy Transformation: Tsai Ing-wen and the New Southbound Policy

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Abstract

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This thesis investigates the introduction of the New Southbound Policy and the evolution of Taiwan's foreign policy more broadly. It asks why President Tsai Ing-wen introduced the New Southbound Policy, and how the NSP makes her foreign policy distinct from her predecessors. This thesis introduces an analytical framework for explaining how international forces, domestic forces, leadership, and constraints collectively shape Taiwan's foreign policy. It then applies this framework to ROC Presidents Lee, Chen, Ma, and Tsai to explain their foreign policy choices. My argument is that Tsai Ing-wen introduced the New Southbound Policy as a response to both international and domestic concerns. The NSP was designed not only to further Tsai's foreign policy interests by reducing economic dependence on China but also to serve her domestic agenda by delivering economic growth. At the same time, this thesis argues that the NSP was chosen over more aggressive options due to domestic political constraints and institutional constraints. The NSP sets Tsai's foreign policy apart because it introduces new methods of economic and soft-power engagement that innovatively uses Taiwan's limited set of foreign policy tools. Importantly, this thesis contributes to the existing literature by emphasizing the significant role that domestic politics and constraints play in motivating and shaping the foreign policy choices of Taiwan's leaders.

Keywords: Taiwan, Tsai Ing-wen, New Southbound Policy, Constraints, Domestic Politics

Introduction

In the last decade, mounting tension between the People's Republic of China and the Republic of China (Taiwan) has imperiled the tenuous cross-strait status quo. As this balance becomes progressively less stable, the disastrous consequences of a potential Sino-American war over Taiwan have drawn the world's eyes to Taiwan. However, even as there has been much handwringing about Beijing's military preparations and Washington's willingness to intervene, analysts and policymakers have consistently underestimated Taiwan's role in determining its own destiny.

In a security triad, all actors' actions matter. Taiwan has interests, and its actions have a marked effect on Beijing's and Washington's strategic calculus. Undoubtedly, China's and the United States' overwhelming economic and military power mean they each have outsized influence on cross-strait relations. Still, even though Taiwan is the least powerful of the three, it actively attempts to secure itself, and how it chooses to do so directly affects the balance of the Taiwan Strait security triad. Therefore, understanding Taiwan's foreign policy choices—and why they are made—is indispensable to any projection for the future of the Taiwan Strait.

Taiwan faces enormous security threats that it must manage, but because of its illegitimate status, it has a limited array of policy tools to do so. Whereas “normal” states make alliances, participate in international organizations, and engage in official diplomacy to manage their external threats, Taiwan is incapable of doing any of these. Still, Taiwan does have options. Its economy punches above its weight, it has a complex and effectively sovereign government, and it can engage in unofficial diplomacy with willing countries or use soft power to appeal to their populations. The challenge that has pervaded the history of Taiwanese foreign policy, therefore, is the extent to which its leaders are able to use their limited foreign policy toolbox to

stave off state predation and pursue their international interests, all while managing their political constituencies at home.

Taiwan's current president, Tsai Ing-wen (蔡英文), has approached this challenge in an innovative way. Shortly after being elected in 2016, Tsai introduced her signature foreign policy initiative, the New Southbound Policy (NSP, 新南向政策). Briefly, this policy seeks to deepen Taiwan's economic, political, and cultural engagement with 18 South, Southeast Asian, and Australasian countries as a means to divert Taiwan's economic dependence away from mainland China. In doing so, the policy seeks to prevent China from using punitive economic measures to coerce unification or punish independence-leaning actions. As a byproduct, the economic and interpersonal ties built with the NSP's target countries ought to elevate Taiwan's standing, earn it new international supporters, and expand its export markets. Importantly, Tsai's New Southbound Policy integrates comprehensive soft power into its approach and represents a whole-of-government, medium-to-long-term strategy to reshape the playing field of cross-strait relations and mitigate Beijing's capacity to force political unification through economic coercion.

The New Southbound Policy also represents various changes and continuity in Taiwanese strategic thinking over the past thirty years. Since democratization, Taiwanese leadership has ebbed between policies that accommodate Beijing's ambitions for political unification and those that directly resist those ambitions. Reversing Ma Ying-jeou's (馬英九) eight-year accommodating posture, Tsai's policy is a pendulum swing, even surpassing the scope and ambitions of Lee Teng-hui's (李登輝) original 1993 Southbound Policy (南進政策/南向政策). Notably, the New Southbound Policy's new ambitions and strategic innovations represent a

significant sea change in Taiwanese foreign policy and contain lessons for how Taiwan's foreign policy may evolve in the future.

This thesis thus asks the question: *why did Tsai Ing-wen adopt the New Southbound Policy? And how does it make her foreign policy distinct from her predecessors?* Through a close analysis of the creation of the NSP, this thesis hopes to identify and explain the foreign and domestic factors that influenced Tsai Ing-wen's formulation of the policy. In doing so, it hopes to shed light on the understudied domestic forces that shape Taiwanese leaders' foreign policy and describe how they will shape Taiwanese politics moving forward. At the same time, it will also show how Tsai managed to use her foreign policy toolbox in an innovative way that set her apart from her predecessors.

Though this thesis will discuss the NSP's functions and ambitions, it focuses primarily on the process of the policy's creation rather than its specific outcomes. The story of Tsai's introduction of the NSP tells a far more fascinating story about Taiwan's strategic decision-making and politics than the actual policy does on its own. The lessons that can be drawn from this story are crucial to understanding the evolution of Taiwanese foreign policy under future presidents.

To paint a comprehensive picture of the NSP's creation, this thesis will be divided into two chapters. The first chapter will provide historical background on Taiwan's politics and foreign policy leading up to Tsai's introduction of the NSP. This chapter identifies how Taiwan's international status, political system, and historical legacies each constrain its leaders' approaches to achieving their preferred policy outcomes. In the process, it will also identify the New Southbound Policy's antecedents and describe the evolution of Taiwan's foreign policy.

This near-term history places the reader in Tsai Ing-wen's shoes and provides an essential backdrop for the following chapter's analysis.

The second chapter zooms in on Tsai Ing-wen, her New Southbound Policy, and the forces that influenced its creation. It opens by providing a framework for analyzing the policy's creation before briefly explaining the NSP's functions and core objectives. Then, the chapter discusses Taiwan's international and domestic circumstances at the time of the policy's proposal, as well as constraints on Tsai's foreign policy options. It then takes these factors into consideration when it subsequently discusses Tsai Ing-wen, her political and ideological goals, and broader foreign policy strategy. The chapter concludes by explaining how the New Southbound Policy fits into this strategy while also responding to the forces and constraints that prompted its creation.

This thesis argues that Tsai Ing-wen's introduction of the New Southbound Policy was driven by the confluence of international and domestic affairs. On the international level, China's increasing economic sway over Taiwan, the uncertainty of future American commitment, and Taiwan's relative regional isolation threatened Taiwan's long-term national security. Having just ridden into office on a wave of nationalist backlash to her KMT predecessor, and with a mandate to deliver fair economic growth, Tsai had to deliver for the political base that elected her. However, Taiwan's international status as an unrecognized state and Tsai's need to not anger specific domestic constituencies limited her foreign policy options. At the same time, she was uniquely empowered by her electoral victory to reverse the course of her predecessor. As an independence-leaning president, Tsai needed to introduce a policy that addressed Taiwan's domestic political demands, responded to foreign threats, and comported with her values and ideological objectives.

Tsai Ing-wen, therefore, introduced the New Southbound Policy because it was the most realistic option for her to simultaneously address domestic political pressure and Taiwan's foreign threats in a way that was ideologically consistent with her goals. Even though her "New" Southbound Policy did follow a familiar pattern set by her predecessors, she innovated new ways to comprehensively engage with target countries on an unofficial level.

This thesis joins a chorus of research explaining why Taiwan behaves the way it does, and how it may behave moving forward. This thesis will contribute to that body of work by explaining Taiwan's international behavior that bridges its domestic politics into its foreign policymaking process. Integrating political constraints, electoral politics, and leaders' goals into analyses of Taiwan's foreign policymaking process more accurately explains how leaders formulate their strategies and select their policies. When these domestic factors are paired with traditional international relations theory and strategic analysis, the resulting analysis is more logically consistent and aligns with the actual historical record. A core insight of this paper is that domestic factors both shape leader's international objectives and explain "roads not taken" when they create their foreign policy.

Additionally, this analysis opens new questions about how domestic and international political circumstances may influence Taiwanese foreign policy moving forward, particularly when its next president is elected in 2024.

Keep working on this to more effectively highlight your key contributions (focus on domestic determinants, analysis of what's significant about the content of Tsai's FP innovations.) Try to trim unnecessary details and repetition.

Literature Review

Several scholars have discussed the reasoning and purpose behind the New Southbound Policy. In general, literature discussing the NSP takes a classical realist lens and focuses primarily on the international and strategic aspects of the New Southbound Policy and less on domestic and political factors. My thesis will engage with scholars' prior work on international factors while adding a closer analysis of domestic factors to this debate. In doing so, it will also open the door to future research on how domestic and international forces interact in Taiwanese politics.

Ngeow (2017) provides the best explanation for why Tsai introduced the New Southbound Policy. He provides a valuable framework for analyzing the NSP and its predecessors that takes the leader's ideology, the state of cross-strait relations, and stated policy objectives into account as determinants of the policies' dimensions and geographic scope.

This framework is logically consistent but incomplete: Ngeow identifies that cross-strait relations and leaders' goals are critical to determining the NSP and its predecessors. However, his analysis neglects the role that domestic politics played in shaping Tsai's choices (Ngeow 2017, 98–100). Though he does consider Tsai's grand strategy and the policy's objectives, he does not take political capital, popular support, electoral constituencies, or institutional constraints into account. The result is that Ngeow's framework correctly explains the NSP's policy dimensions and how they align with Tsai's objectives, but not why she chose it over other options available. Shortly, this thesis will add domestic factors to Ngeow's framework to account for this shortfall.

Jing (2017) also indirectly engages with this thesis' line of inquiry. Though he primarily focuses on why the NSP specifically targets Southeast Asia, he bases his conclusion on an

underlying argument that the NSP is designed to help Taiwan “sub-systemically hedge” against China and to reduce dependence on the mainland economy (Jing 2017). This is an accurate strategic analysis of the policy’s *objectives*, but like Ngeow, Jing only considers the NSP from a purely foreign policy angle and ignores domestic political considerations in the policy formation process. Jing’s assessment correctly asserts the strategic objectives of the NSP, how they comport with Tsai’s inclinations toward independence, and how the NSP navigates Taiwan’s international constraints but still paints an incomplete picture of the forces that drove the NSP’s creation and shape Tsai’s policy choices (Jing 2017, 181–83).

Most recently, Teng (2022) approaches the question of the NSP’s purpose and identifies that the NSP is meant to help grow Taiwan’s economy and explore new markets and industries in Southeast Asia, but his conclusion does not go far enough to explore why now, and for what greater purpose. The bulk of his argument is focused on—correctly—discrediting the notion that the NSP is meant to compete with China’s Maritime Silk Road and explaining how the NSP is designed to fit niche economic sectors in Southeast Asia. However, because his analysis does not engage with deeper strategic or domestic political considerations that informed the policy’s creation, it still doesn’t paint a complete picture of the foreign policymaking process behind the NSP (Teng 2022, 145–61).

These are all pure foreign policy analyses, but therein lies the problem. As much as academics and analysts enjoy analyzing the pristine rationality of foreign policy as insulated from the vulgarity of domestic politics, actual policymakers know well that domestic concerns constantly encroach on strategic decision-making.

The consistent through-line between these scholars’ analyses is that they focus only on international variables while ignoring the implications of domestic politics in shaping foreign

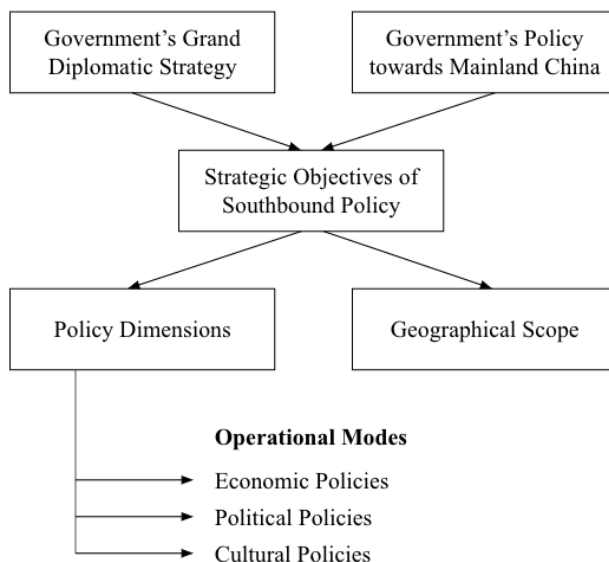
policy. This neglect of domestic politics points to a broader weakness of classical realist theory in explaining Taiwan's behavior. Though none of the authors explicitly argue for a realist framing of the NSP, realism is implicit in all their arguments. However, Taiwan is a unique case, given the extent to which its domestic politics are tied to foreign policy. Foreign policy is not only politicized in Taiwan but is perhaps the most salient axis that divides its two largest political parties. As such, it is necessary to incorporate Taiwan's domestic political conflict over its foreign policy into discussions about its international behavior.

Still, these authors contribute significant insights that are useful to understanding the NSP's creation. As such, this thesis will synthesize these authors' arguments, further the discussion of constraints on Taiwan's foreign policymaking, and introduce the significance of domestic politics. In doing so, it will present a more cohesive and comprehensive explanation of why Tsai introduced the NSP.

Analytical Framework

When discussing Tsai's New Southbound Policy, this thesis will apply a policy analysis framework inspired by Ngeow's (2017) article comparing various administrations' southbound policies (Figure 1). As discussed in the literature review, this particular framework is helpful for comparing different presidents' iterations of southbound policies; however, it lacks the input of domestic variables or constraints. Ngeow's framework was designed to identify how each government's grand strategy and policy toward mainland China shaped their respective southbound policies' strategic objectives, which set the policy dimensions and geographic scope of those southbound policies.

Figure 1
Ngeow's Analytical Framework for Southbound Policies



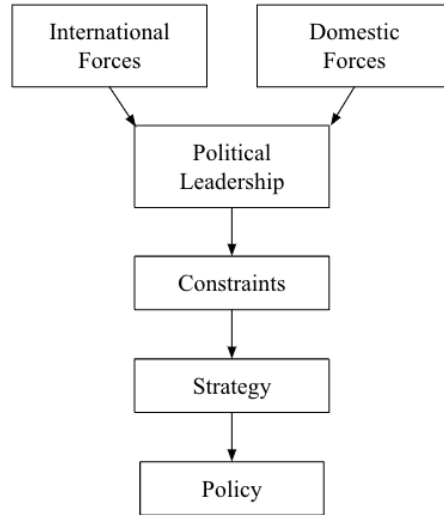
Source: (Ngeow 2017, 100)

Ngeow's framework is useful for what it is meant to do: to map how policy is made to comport with overarching strategy. His framework, however, is not designed to consider how those strategies and interests are formed in the political sphere. This thesis' framework thus considers Taiwan's foreign policymaking process from the lens of political leadership.

This thesis' framework is as follows (Figure 2). It first considers the international forces influencing the ROC, such as Taiwan's security situation, relationship with the PRC, and position relative to nearby economies. It simultaneously considers domestic factors, including the electoral constituencies, the state of Taiwan's economy, and nationalism that shape foreign interests. Then, it considers how political leaders respond to these international and domestic forces. Various presidents' policy goals, ideologies, and political interests shape how they wish to respond to domestic and international stimuli and select their foreign policy interests. These leaders' ability to pursue their preferred political outcomes are then constrained by various factors such as Taiwan's illegitimate status, cross-strait tension, and partisan conflict, which—at

various point—limit and expand leaders’ viable policy options. Within these constraints, leaders then choose a strategy that comports with their goals while also addressing foreign and domestic forces. Based upon that strategy, their policies are created.

Figure 2
Analytical Framework for Analyzing Taiwan’s Foreign Policymaking



This thesis’ framework contributes to the literature by introducing domestic politics and constraints. Through a more methodical discussion of Taiwan’s domestic affairs leading up to the NSP’s introduction, this thesis will describe how domestic politics were a significant driver of the NSP’s introduction and shaped Tsai’s immediate political goals that the NSP sought to address. Constraints also help to explain roads not taken and why the NSP was introduced in the form that it was. As discussed at the opening of this introduction, the primary challenge facing Taiwan’s leaders is how they ought to pursue their ideological or political goals with the limited set of policy options available to them. Taiwan is a unique case wherein its foreign policy “toolbox” is far smaller given its illegitimate status, but that toolbox also dynamically evolves based on the constraints placed on leaders and the ability of those leaders to use their tools in innovative ways.

With this understanding of domestic politics and constraints in hand, this thesis also offers a more optimal framework for understanding and predicting Taiwan's international behavior. New Southbound Policy aside, this framework can be applied to explain Taiwan's policy choices in other areas like military spending, foreign aid, and diplomatic outreach. Given that a new president will enter office in 2024, this framework could potentially be applied to project that president's foreign policy choices or understand them after the fact. Such an understanding of Taiwan's international behavior could equip analysts to better predict the evolution of cross-strait relations and enable political decision-makers to introduce policies that preserve peace in the Taiwan Strait.

Chapter One: Taiwanese Political Development & Foreign Policy 1949-2016

This chapter provides the core historical background on Taiwan's international situation and political development that will form the foundation for analyzing Tsai Ing-wen and her New Southbound Policy in chapter two. It opens with an overview of the Republic of China's political evolution from 1949 to 1987, which sets up the key features of Taiwan's unique political and security position that come to constrain its foreign policy options. Then, it describes the various shifts in Taiwanese foreign policy during and post-democratization, from the beginning of Lee Teng-hui's term in 1988 to the end of Ma Ying-jeou's government in 2016.¹ Throughout the latter half, it also describes each president's policy toward Southeast Asia in relation to their cross-strait policy.

Two interwoven themes pervade Taiwan's foreign policymaking. The first is the various constraints in Taiwanese politics that limit the extent to which leaders can pursue their preferred policy outcomes. In Taiwan's case, these are a combination of international constraints due to the ROC's illegitimate status following 1971 that disable it from using normal levers of foreign policymaking. At the same time, domestic political factors act to empower or disable leaders from pursuing their desired political outcomes. Though the interplay of domestic and international forces in foreign policymaking is not unique to Taiwan, the particular instances of constraints that occur in Taiwan are unique from regular governments.

The second theme is that Taiwan's foreign policy toward "third countries" or countries that are not the People's Republic of China is a direct corollary, or in some cases subordinate, to

¹ This thesis chooses to focus solely on the foreign policies of post-martial law presidents. This is because the relationship between domestic and international forces on Taiwan's foreign policy is different before democratization and fall out of the scope of background relevant to this thesis' analysis of Tsai and her NSP.

the ROC's cross-strait strategy. As various ROC presidents' policies toward Beijing change, so do their policies toward the rest of the world. In the presidencies analyzed in this chapter, it is Taiwan's policy toward Southeast Asia, in particular, that evolves in relation to the ROC's cross-strait policy.

These themes, in addition to the factual background laid out in this chapter, are necessary to understand the various forces at play in the following chapter. The historical legacies and immutable strategic circumstances all have significant sway on the events leading up to Tsai Ing-wen's introduction of her New Southbound Policy and will continue to influence Taiwanese foreign policy in the foreseeable future.

From Autocratic Government-in-Exile to Democratic Pseudostate: Taiwan's Political Evolution from 1949 to 1987

Between 1949 and 1987, the Republic of China underwent two significant political developments that would shape the way that Taiwan's contemporary foreign policy is formulated and executed. The first is that the ROC devolved from a legitimate sovereign state to an internationally delegitimized pseudo-state, significantly limiting Taiwan's foreign policy tools and its horizon of achievable international objectives. The second is the decline of authoritarianism and the beginning of democratization in the ROC government, which expanded the circle of participants and stakeholders in foreign policymaking. These two evolutions have come to define and constrain Taiwan's contemporary foreign policy. These evolutions can be summarized through three critical events: UN derecognition, American derecognition, and the beginning of political reform following the end of martial law.

Following its defeat in the Chinese Civil War in 1949, the Republic of China—led by the nationalist Kuomintang (國民黨, KMT) party—evacuated its government and military to the island of Taiwan off the west coast of China. Though ROC President Chiang Kai-shek (蔣介石, 蔣中正) originally intended to use Taiwan as a base to retake the mainland, the ROC’s temporary occupation became indefinite. As gunfire between opposing sides fell quiet and Chiang realized naval reconquest of the mainland would be impossible, the ROC government settled into its permanent home. Over the next forty years on Taiwan, the Republic of China would gradually, and at times painfully, evolve from a dictatorial government in exile into a democratic pseudo-state.

With the Cold War intensifying, the Taiwan Strait became one of several fault lines between the communist Eastern Bloc and the capitalist Western Bloc. On the Asian mainland, the People’s Republic of China introduced the “One China Principle” which insists that “there is but one China in the world, Taiwan is an inalienable part of China’s territory, and the Government of the People’s Republic of China is the sole legal government representing the whole of China” (Central People’s Government n.d.). However, the PRC’s efforts to assert control over Taiwan were stymied by the United States, which—until 1979—continued to recognize the ROC as the sole legal government of China and guaranteed the ROC’s territorial integrity through a mutual defense treaty.

In exile and under threat, three critical events shaped Taiwan’s current strategic situation in the 38 years following the KMT’s retreat to Taiwan. First, in 1971, the United Nations General Assembly and Security Council formally recognized the People’s Republic of China as the sole representative of China (United Nations 1971). The ROC had already been losing diplomatic allies to the PRC since 1949, but UN Resolution 2758 launched a new cascade of

ROC derecognition and represented a tipping point against the ROC's claim to be the rightful government of the whole of China (Rich and Dahmer 2022). This decision also marked the end of formal participation by the ROC in most international organizations. As such, this event was not only a blow to the ROC's international legitimacy but also to the KMT's justification for maintaining martial law in Taiwan (Schafferer 2020, 45–46). From here on, Taiwan's government would be increasingly limited in its formal diplomatic options and disabled from acting as a normal state.

Second, in 1979, the United States formally derecognized the Republic of China, abrogated the US-ROC mutual defense treaty, and recognized the People's Republic of China. The United States introduced a "One-China Policy," which recognizes the PRC's sovereignty over China but does not explicitly recognize Taiwan as part of China. Instead, the U.S. merely "acknowledged" the Chinese position that Taiwan was a part of China and made clear that it would maintain informal relations with Taiwan under the Taiwan Relations Act (Green and Glasser 2017). This opened an era of official "strategic ambiguity"² in which the United States remained deliberately vague as to whether it would intervene in a Taiwan Strait conflict in order to complicate the risk calculus for China invading or Taiwan declaring independence, thereby deterring both from taking actions that could spark a conflagration (Keegan 2021).

What did these American policy choices mean for Taiwan? For one, losing American diplomatic recognition was the final nail in the coffin for the legitimacy of the ROC's claim to be the one true China. More importantly, because the ROC's existence until this point was only guaranteed by the US's anti-communist foreign policy, Sino-American normalization significantly reduced Taiwan's usefulness as a geopolitical proxy and left its security uncertain.

² The U.S. previously employed strategic ambiguity in Taiwan Strait during the Korean War, but strategic ambiguity as it is contemporarily understood only came into effect after the U.S. derecognized the Republic of China.

Taiwan would no longer be able to rely totally on American military intervention should a cross-strait conflict erupt and would have to account for this uncertainty as it began to walk an even narrower tightrope between PRC and US interests.

The third critical event was the gradual process of democratization. This slow, institution-building process formally began with the end of the ROC's long period of martial law in 1987. As the international and domestic legitimacy of the KMT government declined, Taiwan's growing middle class and civil society made authoritarian rule over Taiwan untenable (Schafferer 2020, 49). Following the end of martial law, the ROC introduced staggered reforms to allow the formation of political parties and open legislative (1992), municipal (1994), and presidential elections (1996) (Reuters 2011). To be clear, Taiwan couldn't be called a liberal democracy until well into the late 1990s. Still, the relaxation of martial law opened the door for civil society groups to flourish and gave the Taiwanese public formal avenues for political participation.

Although the strategic implications of the ROC's international derecognition and near-abandonment by its primary security guarantor are apparent, the international implications of democratization are less self-evident but no less critical. With the end of one-party rule and the suppression of ethnic divides, new political parties and interest groups entered the political fray. Changes in Taiwanese governance and identity reshaped Taiwan's fundamental strategic interests and foreign policy objectives. The ROC's political class was no longer concerned with challenging the PRC's sovereignty over China. Instead, new debates over unification, independence, autonomy, and state-building took over the foreign policy sphere. Within the KMT, there was considerable division on when and on what terms unification with the PRC should be negotiated (Bush 2005, 72–4). Outside the KMT, new waves of activism on Taiwanese

independence gave birth to the Democratic Progressive Party (DPP), which challenged the KMT's electoral dominance (Phillips 2005, 62–4). Taiwan's strategic interests were no longer those of a government-in-exile but those of a polity that sought to act as a normal state (Schafferer 2020).

However, these new foreign policy interests were constrained by institutional and exogenous factors. Like a hermit crab changing its shell, Taiwan's polity came to control a state that was not built for it. Taiwan thus faces a dilemma that prevents it from acting as a normal state. On one hand, the Taiwanese people are still divided as to whether they would prefer being an independent country or politically unifying with the PRC (Election Study Center, NCCU 2023a). On the other hand, even if Taiwan's voters were unified in support of independence, the PRC's intent to integrate with Taiwan and the challenges inherent in American strategic ambiguity limit Taiwan to a small range of practical options for asserting such a foreign policy agenda. Like the aforementioned hermit crab, the Taiwanese public is forced to make do with the shell it has. Were Taiwan to attempt to shed its government for a more fitting one, it would face near-certain predation in the interim.

Where do these three critical events leave Taiwan at the start of our analysis? UN derecognition, American abandonment, and democratization have made Taiwan an anomaly. Taiwan is governed by a regime considered illegitimate by most of the world's countries. It still officially claims to be the rightful government of China, even though none of its leaders believes this seriously. Its survival rests on a geopolitical balance between two of the world's most powerful states whose intentions and means to upset that balance are difficult to gauge. Moreover, even within the small range of foreign policy options available, its leaders bitterly disagree on which they should adopt.

This is the Taiwan that Lee Teng-hui inherited when he entered office in 1988.

Threading Needles: The Foreign Policy of Contemporary Taiwan (1988–2016)

Between 1988 and 2016, three presidents shepherded Taiwan's foreign policy.

Throughout this era, one can see each president navigate the two aforementioned constraints of international delegitimization and democratization as they attempt to pursue their foreign policy goals. As the ROC was increasingly dwarfed by the growing power of the PRC, these presidents attempted to cope with and respond to the cross-strait power imbalances with the limited range of foreign policy options available to them. Lacking the ability to form alliances, engage in official diplomacy, and participate in international organizations, these presidents used tools like trade, industrial policy, political symbolism, and informal diplomacy, as well as tactics like appeasement and hedging to try to advance Taiwan's national security.

Moreover, now that they were no longer insulated from the popular will, these presidents were also constrained by party disunity, elections, divided government, and popular movements that could empower and upset their preferred agendas. In this sense, each president's foreign policy toolbox expanded and contracted depending on the domestic circumstances that affect their political capital, reelection chances, and unified control of political institutions. The events that occurred over these three administrations were naturally fresh in the minds of Taiwanese leading into Tsai's election and thus set the stage for her New Southbound Policy.

Importantly for the next chapter, we also see Taiwan deepen its engagement with Southeast Asia during this period. Presidents Lee and Chen implemented the original Southbound Policy—the antecedent of Tsai's New Southbound Policy. Lee, Chen, and Ma's approaches to Southeast Asia reflect these leaders' varying political objectives, the evolving state

of cross-strait relations, and Taiwan's emerging role in the region. Although cross-strait relations have always been the crux of Taiwan's foreign policy, Taiwan's policy toward Southeast Asia became a significant secondary focus during this period and was often connected directly to a given administration's cross-strait policy.

Lee Teng-hui (1988–2000)

A variety of new domestic and international forces enabled and constrained ROC foreign policy during Lee's tenure. Chief among these were Taiwan's burgeoning cross-strait exchange with the PRC, internal politics within the ruling KMT, the opening of democratic elections, and the emergence of Taiwanese nationalism as a significant force within those elections. Now that the ROC was well into its process of "Taiwanization," Lee accepted Taiwan's less-than-optimal international situation and decided that Taiwan's only hope to survive was to make do with the tools it had. As such, he implemented a foreign policy in which Taiwan attempted to act like an independent state rather than a government in exile (Clark 2007). This paradigm shift enabled two critical changes that would shape Taiwan's foreign policy for the coming two decades. The first was the *de facto* realignment of cross-strait relations from being between two governments of the same country to being between two separate countries. The second was Taiwan's pivot to pragmatic international engagement, most significantly with Southeast Asia under Lee's Southbound Policy.

One crucial feature of Lee's extended 12-year tenure is that not all the domestic and international forces listed above remained consistent throughout his presidency. Naturally, elections only became relevant once fair and free legislative—and later presidential—elections were implemented during his tenure. As Bush (2005) notes, Lee's foreign policy changed as he

consolidated power and faced electoral pressure. This is a critical trend that undergirds Lee's foreign policy: as time passed, Lee gained greater control over his foreign policy agenda, was less constrained by KMT, and faced greater pressure from the DPP (Bush 2005, 78–9).

The net outcome of Lee's foreign policy is that by the conclusion of Lee's presidency the ROC's cross-strait policy came to reflect a *de facto* relationship between China and Taiwan instead of a relationship between two competing governments of China. During his tenure, Lee never broke his official support of unification,³ but over time he increasingly added political conditions and redlines to his stance and argued that Taipei and Beijing should approach unification on equal footing. These conditions like the renunciation of force, democratization, and the rejection of “one country, two systems” slowed the process of unification, if not making it impossible (Bush 2005, 89–90). To this point, the ROC's trend toward unification halted, if not reversed under Lee's tenure.

When he took office in 1988, Lee ascended to power through succession after the death of Chiang Ching-kuo. As a result, his cabinet was made up of mainlander holdovers and his personal power was weak, therefore his foreign policy remained consistent with the KMT line for several years (Bush 2005, 74). Lee continued the KMT's policy of rapprochement by opening channels for party-to-party dialogue, migration, and commercial contact with the mainland. As a result, person-to-person contact between those on the mainland and in Taiwan increased, and cross-strait trade and investment boomed (Clark 2007). These changes were a boon for the mainland and Taiwanese economies, but some in Taiwan—including Lee—were concerned that skyrocketing trade and investment in China would make Taiwan's economic fortunes

³ Later in life, Lee did actively back Taiwanese independence. Though he only took publicly took this stance many years after leaving office (Kandell 2020). It is unclear whether these are views that Lee developed during or after his presidential tenure.

excessively dependent on the mainland and thereby give Beijing a significant point of leverage over Taiwan's politics.

However, Lee progressively consolidated his power within the KMT and was able to replace mainland holdovers in his cabinet. Also, as local and legislative elections became democratic, the DPP and others challenged the KMT's party line on unification, and Lee responded to and coopted their stances (Bush 2005, 78).

In the early 1990s, Lee's government began to reverse course on economic closeness and political integration with Beijing. Lee actively stalled formal steps toward unification and rejected Beijing's "one country, two systems" formulation for negotiations (Leifer 2001). Lee's stance continued to harden over the course of his presidency. The pro-unification New Party's split from the KMT, Third Taiwan Strait Crisis, and growing electoral power of the pro-independence DPP all gave Lee domestic grounds to demand more from Beijing in negotiations (Baron 2020).

Toward the end of Lee's term as president, ROC-PRC relations grew icy, and Lee took direct policy and symbolic action to ward off unification. Months after his first election in 1996, he introduced limits on Taiwanese investment with Mainland China through his "Go Slow" policy. Later on in 1999, Lee introduced a new theory that cross-strait relations are a "special state-to-state relationship (特殊的國與國關係)," further souring relations with Beijing (Clark 2007). By the end of Lee's 12-year presidency, the "Taiwanization" of the ROC and Lee's insistence that on equal footing stalled unification so dramatically that cross-strait relations came to resemble a relationship between China and Taiwan rather than two opposing governments of China.

Lee's foreign policy toward other countries naturally reflected Taiwan's domestic politics and complemented his cross-strait policy. Among the stances he coopted from the DPP was an insistence that Taiwan play a more significant international role (Bush 2005, 78). As the ROC government resembled a government of Taiwan more than a government of China, Lee was able to break away from the longstanding KMT policy that the ROC should only engage with countries that recognize the ROC's claim to be the rightful government of China (Rubinstein 2007). Thus, Lee launched a "pragmatic diplomacy" campaign in which he sought to elevate Taiwan's international status by informally engaging with various governments through trade agreements, informal visits, and limited participation in international economic organizations like the WTO and APEC (Leifer 2001). A charm offensive ensued in which Lee sought to build up Taiwan's international profile as a *de facto* independent country and rebuild Taiwan's economic dynamism through new channels of economic engagement. Though Lee could not send ambassadors or sign treaties, he could appeal directly to the business communities of foreign countries by directing Taiwan's trade and investment overseas, thereby giving those countries a stake in Taiwan's continued autonomy.

The Southbound Policy (南向政策, a.k.a. 南進政策) was the centerpiece of Lee's pragmatic diplomacy. Under the Southbound framework, Taiwan expended significant effort to deepen economic and political integration with Southeast Asia. Announcing the policy in 1993, its overarching goals were two-fold: first, to rejuvenate Taiwan's economic dynamism by capitalizing on Southeast Asia's cheap labor, land, and growing export markets. The second was to explicitly "avoid the risk brought out by excessive reliance on the mainland," those risks being that the PRC would use the ROC's economic dependence on the mainland to coerce it into a unification agreement (Chiang 1993). As such, Lee's Southbound Policy was just as much a

corollary to his national security strategy of stalling and resisting cross-strait unification as it was a project to boost domestic economic growth.

To achieve these aims, the Southbound Policy leveraged various incentives and reforms to stimulate investment and offshoring to initially five, then by 1999, all nine countries in the ASEAN Free Trade Area plus Australia and New Zealand (Huang and Chou 1997). On the diplomatic side, Lee's government negotiated a series of bilateral customs tax agreements to avoid double taxation and tax evasion. As for economic incentives, Lee mobilized state enterprises to invest abroad and removed barriers for private firms that invested in factories and basic infrastructure in target countries. His government opened overseas offices to support, advise, and legally advocate for Taiwanese investors expanding their enterprises abroad. These incentives continued through the 1997 Asian Financial Crisis, and by the end of Lee's term, Taiwan's investment in Southeast Asia was booming and had even eclipsed investment going to China in some years (Rubinstein 2007).

The significance of Lee's foreign policy for Taiwan's current strategic conditions cannot be overstated. His balancing of accommodation of and resistance to the mainland and efforts to boost Taiwan's economic integration abroad set the contemporary framework for Taiwan's security. He managed to shift Taiwan's foreign policy paradigm to that of a *de facto* independent country and prolonged Taiwan's political autonomy far longer than if he hadn't changed the ROC's course. His pragmatism in the Taiwan Strait and abroad helped to delay Beijing's ambitions for unification and secured Taiwan's *de facto* political independence.

Chen Shui-bian (2000–2008)

Compared to his predecessor, Democratic Progressive Party President Chen Shui-bian's (陳水扁) foreign policy was significantly more constrained and, overall, less successful in terms of improving Taiwan's foreign relations. As opposed to Lee, who dealt with largely intra-party conflict and only faced democratic pressure beginning in the middle of his term, Chen's tenure was defined by his conflict with the KMT-controlled Legislative Yuan. Moreover, Chen's bombastic advocacy for formal independence enraged Beijing and alienated the United States and third countries open to working with Taiwan. This interplay of domestic and international constraints rubbed against Chen's ideological goals, and this friction defined his foreign policy legacy.

Despite being elected the first non-KMT president and participating in Taiwan's first peaceful transfer of power, Chen lacked popular support and political capital to pursue his political goals. The 2000 election was a three-way race, and he had won with only a 39% plurality, then only barely won reelection in 2004 with a 0.22% edge (Central Election Commission 2023b). To make matters worse, the DPP and its Pan-Green Coalition only ever held a plurality in the legislature during Chen's term and his agenda was thus neutered by the KMT-led Pan-Blue Coalition. The national bureaucracy was also populated by career officials who were loyal to the KMT, and Chen's DPP cabinet largely lacked experience and expertise (Clark 2007). The result was that Chen lacked a popular mandate, grappled with a legislature that was hostile to his foreign policy, and he was unable to effectively run his own executive apparatus.

Though his foreign policy was neutered by his inability to muster legislative backing, he was still able to leverage his bully pulpit and role as head of state to symbolically strive toward

independence. Still, his agenda of promoting Taiwanese independence was unpopular abroad and he face significant pushback that burned goodwill Lee Teng-hui had built up with other countries. As it did for Lee, this thesis will separately analyze Chen's cross-strait policy and broader foreign policy.

When Chen entered office in 2000, he was a long-time advocate of Taiwanese independence. Though he was historically strong proponent of the cause, he also did not demand immediate *de jure* independence. Chen's aspirations for Taiwan independence were heavily constrained by the threat of a PRC military response, and the United States was ardently opposed to any move toward declaring formal independence. Knowing these constraints, Chen responded to the mainland's insistence on unification by slowly turning up the heat on—while not to boiling—the proverbial frog.

While his party actively pressed Chen to amend Taiwan's constitution to declare *de jure* independence, he refrained from doing so. This is primarily due to the constraints of electoral politics and Taiwan's unstable security situation.

On the electoral front, Chen advocated for eventual independence but offered assurances to voters—as well as the world—that Taiwan would not declare independence unless provoked. On the campaign trail and at his inauguration, Chen outlines various redlines that, if crossed, would trigger his government to immediately seek formal independence (Liu 2001, Chen 2000). These assurances softened the sharper edges of the DPP's pro-independence platform and helped Chen to avoid alienating voters who were not all in on Taiwanese independence.

On the international front, Chen was also deterred from pursuing formal independence by China and the United States. Though Chen wished for *de jure* independence, a formal declaration would have invited military action by Beijing. Moreover, the George H. W. Bush administration

was resolutely opposed to Chen changing the status quo and signaled reluctance to intervene on Taiwan's behalf if he did so (Knowlton 2003).

Chen's assurances and redlines enabled Chen to thread the needle on Taiwan independence. Chen was able to deliver on preventing unification for his pro-independence base while also not pushing away moderate supporters of independence, provoking China, or alienating American security backing. He could not achieve his desired objective of *de jure* independence, but he did freeze all prospects for unification during his tenure. Instead, Chen leaned on largely symbolic gestures toward independence to shore up support with his base.

At various points, he artfully employed creative formulation and policy stances to please pro-independence factions without provoking a violent response from Beijing. In 2002, Chen introduced the "One Country on Each Side (一邊一國)" formulation which expanded Lee's "special state-to-state relationship" theory when he stated to press that "with Taiwan and China on each side of the strait, each side is a country" (Snyder 2002).⁴ He also announced support for a legislative bill that would make a plebiscite on independence possible, but not necessarily start one (Bradsher 2002). What made these moves masterstrokes is that neither required nor were likely to make *de jure* moves toward independence, and thus didn't break his assurances that he would not declare independence. His "One Country on Each Side" formulation was only a redefinition of Taiwan's *de facto* status, and his support of the plebiscite bill was only symbolic because he knew he wouldn't pass due to the legislature being controlled by a KMT-led coalition. And even if the bill did pass, it would have only *enabled* his government to hold a plebiscite at will rather than schedule one in law.

⁴ Side Note: future president Tsai Ing-wen was in charge of damage control with US officials in D.C. in the immediate aftermath of Chen's comments. She still agrees with Chen's formulation to this day.

Naturally, these actions heavily damaged Cross-Strait relations and relations with the USA at the expense of inching toward Chen's preferred policy outcome of Taiwanese independence. Chen's cross-strait bluster and its effects also spilled over into his foreign policy toward the rest of the world (Clark 2007). Chen continued Lee's Southbound Policy and generally held to Lee's pragmatic diplomacy, though both had much sharper edges. As in its cross-strait policy, the Chen administration actively sought symbolic victories since a lack of legislative support made substantive victories difficult (Clark 2007).

Chen's Southbound Policy maintained Lee's primary goals of boosting Taiwan's economic growth and mitigating dependence on the mainland, but he demanded far greater symbolic recognition from target countries. On the economic end, Chen expanded Lee's southbound policy to provide direct financial support to participating firms, promoted technical assistance, and opened channels for migrant labor to enter Taiwan. Politically, he also sought free trade agreements with ASEAN and its member states, but these were politically toxic to target countries due to cross-strait tensions, and none were ever signed (Ngeow 2017, 106–9).

Chen strove for Southbound Policy target countries to treat Taiwan as a symbolically independent state, but in the end, he achieved little symbolically and alienated governments who would have otherwise been more willing to work with him. Chen's bluster and demands for symbolic gestures to recognize Taiwanese sovereignty alienated the George W. Bush administration and made potential allies in Southeast Asia anxious about backlash from China. Worse yet, during his tenure, Taiwan's investment in the mainland consistently surpassed those toward Southeast Asia, though, as Ngeow notes, some argue that the imbalance would have been worse without the Southbound Policy (Ngeow 2017, 109).

In summary, Chen Shui-bian's tenure further demonstrates the extent to which international and domestic constraints come into conflict with Taiwanese leaders' goals. In conjunction with domestic partisan barriers, international pressure and isolation limited Chen's options and led him to pursue a symbolic foreign policy compared to Lee. These constraints pervaded his cross-strait policy and policy toward third countries.

From a broader perspective, Chen's administration reflects the difficulty of Taiwan's foreign policymaking. Chen had strong ideological and nationalist interests he wanted to see reflected in his foreign policy, but he was consistently stymied by foreign and domestic forces. Ultimately, Chen was limited to using political symbolism and the bully pulpit to advance his foreign policy agenda and serve his pro-independence base. This symbolic push resulted in Taiwan being more isolated, less safe, and no closer to achieving independence. Still, Chen was stuck between a rock and a hard place. Though he was undoubtedly not as politically savvy as Lee Teng-hui, he was also just unlucky with his political circumstances and incapable of effectively achieving his ideological goals with the limited tools he had.

Ma Ying-jeou (2008–2016)

During his tenure, KMT President Ma Ying-jeou (馬英九) was markedly less constrained by institutional challenges and cross-strait pressure than Chen and was thus able to more freely pursue his preferred foreign policy agenda of rapprochement with Beijing. As such, two significant changes occurred to Taiwan's foreign policy trajectory. The first was that relations warmed with Mainland China as Ma took a conciliatory approach to Beijing. The second was that his administration achieved greater success in economically engaging Southeast Asia than

Chen, despite publicly deemphasizing the significance of engaging the region in its foreign policy.

After Chen Shui-bian's unpopular tenure and spotty foreign policy record with the mainland and third countries, Ma Ying-jeou had significant political leeway to take the ROC's foreign policy and economy in a new direction. On the political front, he entered office with a landslide 17-point voting margin and a mandate for economic change amid the 2008 financial crisis (Central Election Commission 2023b). Moreover, his party maintained control over the Legislative Yuan for the duration of his eight-year term and—unlike Chen—was able to pass the legislation needed to implement Ma's agenda (Central Election Commission 2023a). Toward the end of his term, however, Ma and his party's engagement with Beijing was constrained by economic and nationalist backlash to his policies.

On the cross-strait front, Ma pursued closer ties with Beijing while assuaging worried voters with a promise of “no unification, no independence, no use of force” during his term (Apple Daily 2016). After a nine-year pause in contact, Ma's government reopened dialogue with Beijing on the basis of the “1992 Consensus” between unofficial cross-strait negotiators that there is only “one China” but that each side has its own interpretation of what “one China” means (Kan 2014). In brief, Ma's pivot to the 1992 Consensus satisfied Beijing's insistence on Taiwan holding to its “One China Principle” without renouncing the ROC's sovereignty and thus paved the way for Ma's government to negotiate 23 agreements governing trade, travel, and investment with Beijing (Mainland Affairs Council 2022; Chen and Cohen 2019).

The warming of relations eventually culminated in three significant events. The first was the signing of the 2010 Economic Cooperation Framework Agreement (ECFA), which significantly liberalized cross-strait trade by reducing tariff and customs barriers between the

PRC and ROC (“Haixia Liangan” 2010). The next was the introduction and withdrawal of the Cross-Strait Service Trade Agreement (CSSTA), which, had it been ratified, would have further liberalized bilateral trade and investment in China and Taiwan’s service sectors (Fan 2014). However, Ma was eventually forced to abandon the agreement due to the Sunflower Movement, a populist student movement that opposed the CSSTA because it would have made Taiwan’s economy too dependent on the mainland and disproportionately benefitted the wealthy (Fan 2014). The last significant event in cross-strait relations under Ma was his 2015 meeting with PRC President Xi Jinping, a symbolic high-watermark for cross-strait relations, but it ultimately did not lead to substantive changes (Wang 2015). These three significant events helped spark a nationalist backlash against Ma. By the end of his term, the KMT had been wiped out at the local level in 2014 and nationally in 2016 (Wang 2016).

Regarding his administration’s policy toward Southeast Asia, Ma deemphasized political visibility in Taiwan outreach and thus saw significant gains in economic connection with the region. Though he discontinued the Southbound Policy of his predecessors in name, he effectively maintained its objectives while emphasizing a new “low-key” approach (Matsuda 2014). Given that target countries were unwilling to negotiate with Chen due to the escalation of cross-strait tensions, Ma hoped that calming relations with Beijing would allow Southeast Asian countries the space to negotiate with Taipei (Matsuda 2014). During Ma’s tenure, the ROC secured two new free trade agreements with Singapore and New Zealand. However, investment volumes overall were more mixed as Taiwan’s investment toward China consistently eclipsed investment toward Southeast Asia (Ngeow 2017).

In short, Ma Ying-jeou’s foreign policy legacy is mainly tied to the initial lack of constraints on his foreign policymaking that enabled him to pursue détente with Beijing more

aggressively. However, the fact that Ma overplayed his hand when engaging with Beijing and neglected engagement with Southeast Asia would open the door for Tsai Ing-wen to reverse much of his policy legacy. In effect, the constraints of widespread nationalist backlash against Ma's policy came late in and after his term and would cause the political pendulum to swing back toward independence-leaning forces.

Conclusion

Taiwan's complicated historical legacies and institutional constraints act to limit the menu of foreign policy options available to its leaders. As discussed in the first half of this chapter, Taiwan's pseudo-state status and proximity to great powers politics place it in a precarious security situation and limit its foreign policy options. At the same time, Taiwan's democratization has multiplied the number of domestic actors influencing its political sphere and complicated its leaders' political calculus. Taiwan's identity and political system have changed, but its status as an illegitimate state has not, meaning that its leaders must grapple with domestic and international forces with limited foreign policy options.

Furthermore, in the latter half of this chapter, these conflicting forces are explored in the three democratic presidencies preceding Tsai Ing-wen and their respective approaches to cross-strait relations and Southeast Asia. Each president had to balance Taiwan's international circumstances against their own domestic political situation while pursuing policies that aligned with their respective values. At the same time, Taiwan's international status and democratic system meant its leaders had limited options to respond to these international and domestic forces. At various moments these domestic and international forces were in concert or conflict,

and leaders—depending on their goals and policy options—either exploited the overlap of those forces or were themselves hamstrung by their tension.

These events, policies, and political circumstances were very relevant to Taiwanese politics during the period examined in Chapter 2. It helps to place these events in perspective: at the time of Tsai Ing-wen’s election in 2016, the KMT had fled to Taiwan 67 years prior, the ROC had lost UN recognition 45 years before, and Taiwan had only had its first democratic presidential election 20 years ago. Moreover, though the ROC was 104 years old in 2016, it had only resembled a “Taiwanese” government for about 30 years. Importantly for the following chapter’s analysis, Lee, Chen, and Ma’s foreign policies were about as fresh in Taiwan’s memory as the collapse of the Soviet Union, the War on Terror, and the Iran Deal were to Americans when Donald Trump entered office.

This is all to say that context matters. These historical legacies, in conjunction with the structural features of Taiwan’s domestic and foreign politics, are essential to understanding Tsai’s New Southbound Policy, the process of its creation, and its implications.

Chapter 2: Tsai Ing-wen's New Southbound Policy

Upon taking office in 2016, Tsai Ing-wen changed Taiwan's foreign policy trajectory. Riding a wave of nationalist backlash to Ma's push for economic integration with the PRC and armed with a mandate to rejuvenate Taiwan's economy, Tsai Ing-wen positioned the New Southbound Policy as her signature initiative in her inaugural speech (Tsai 2016a; Tsai 2016b). The NSP is first an economic policy that addresses domestic political concerns of economic stagnation but also carries significant national security implications. The process by which it manages to fit both tells an important story about how Taiwan's foreign policy is made and how it may continue to develop with broad economic and security implications for Taiwan, China, their surrounding region, and the United States.

Before this story can be told, framing is essential. American foreign affairs analysts tend to view Taiwan's foreign policy solely from the perspective of cross-strait relations. Given the significance of a potential Taiwan Strait crisis to U.S. national security, this mindset is justified. Still, this approach neglects domestic factors that shape its behavior leaving these analysts with incomplete—or inaccurate—understandings of Taiwan's foreign policy. In the author's anecdotal experience, American "Taiwan specialists" are perhaps no better. They correctly oppose this objectification of Taiwan in international affairs and work hard to emphasize Taiwanese agency in their analyses. However, their efforts to center Taiwan sometimes overcorrect to the point of viewing it in a vacuum. Thus, this chapter will attempt to split the difference in its analysis of the New Southbound policy by discussing how domestic and international factors interact to shape the New Southbound Policy and presenting that discussion in terms that are useful to foreign analysts and policymakers.

On its face, this thesis' question of why Tsai Ing-wen adopted the New Southbound Policy should be simple. The policy documents which outline the goals, tools, and deliverables of the NSP are straightforward: the NSP is an omnibus economic strategy designed to grow Taiwan's economy by expanding its connections with economies overseas. However, these policy objectives alone do not tell the whole story. Instead, this chapter approaches the NSP with a holistic lens to examine the array of domestic and international political forces facing Tsai and how they interacted with her policy choices to create the New Southbound Policy.

This chapter will open by introducing the policy itself. By analyzing the NSP's framing documents, this chapter will identify the policy's functions and what it seeks to accomplish. Then, drawing on prior scholars' work, it will compare the NSP to previous administrations' similar policies on these same metrics. Next, it will place the reader in Tsai Ing-wen's shoes by describing the international and political circumstances that raised her to power and influenced her as she began her presidency. Then, it will describe how institutional and political factors both constrained and expanded her policy options compared to prior presidents. Lastly, it will focus on Tsai, her political and ideological objectives, and read between the lines as to how her New Southbound Policy responds to the above circumstances.

The New Southbound Policy

The New Southbound Policy, in brief, is Tsai Ing-wen's comprehensive strategy for expanding Taiwan's economic ties with ASEAN, South Asia, and Oceania. It leverages a variety of incentives to stimulate Taiwan's economic integration with its 18 target countries. Contrasting its predecessors, it takes a far more comprehensive approach to economic integration by combining prior policies' emphasis on trade with a new comprehensive effort to leverage soft

power, person-to-person relations, and technical expertise to build economic bridges on the personal, firm, and sector level rather than just the national level.

Goals and Deliverables

In her inaugural address in 2016, Tsai Ing-wen identified the five core tasks of her presidency, the first of which was “transforming economic structures.” She promised her administration would pursue a “New Model for Economic Development,” beginning with strengthening the Taiwanese economy’s autonomy and overseas connections. Tsai then identified her flagship New Southbound Policy as a means to expand “the scope and diversity of [Taiwan’s] external economy” and end “overreliance on a single market,” alluding to mainland China. Later in her fourth point, she lamented that changing regional dynamics meant that if Taiwan did not actively participate in the region, it would “become marginalized and lose the ability to determine its own future.” She then offered a solution: her New Southbound Policy will develop international connections and build a new sense of “economic community” between Taiwan and NSP target countries (Tsai 2016a; Tsai 2016b).

On Tsai’s terms, the overarching objectives of the New Southbound Policy were threefold: 1) to grow Taiwan’s economy by expanding overseas connections, 2) to reduce economic dependence on Mainland China, and 3) to build closer relations with NSP target countries. Notably, while the first and third goals are broadly emphasized in all the NSP’s policy documents, the second is mainly expressed in leaders’ comments with only scant mention in policy documents.

In its official guidelines, the NSP’s concrete policy objectives are divided into short-to-medium-term and long-term goals. In the short-to-medium term, its goals are to 1) expand

bilateral exchanges in trade, investment, tourism, culture, and talent, 2) encourage enterprises to build their own southbound strategies for expansion, 3) build the human capital needed to facilitate the NSP, and 4) expand channels for dialogue and negotiation with target countries to strengthen economic cooperation. In the long term, the policy is intended to build a so-called “sense of economic community.” By forging deep win-win links with NSP countries in targeted sectors, building wide-ranging channels for dialogue, and securing trust and consensus, the NSP hopes to make the countries of South, Southeast Asia, and Australasia invested in their partnership with Taiwan (Office of the President 2016c; Office of the President 2016d).

Policy Tools and Targets

The New Southbound Policy targets 18 countries in total: all 10 ASEAN member states, Australia, New Zealand, and the six South Asian countries of India, Bangladesh, Pakistan, Sri Lanka, Bhutan, and Nepal (Office of the President 2016c; Office of the President 2016d) Except for Timor-Leste, Papua New Guinea, and the Pacific islands states, the NSP targets virtually every country to the ROC and PRC’s South and encompasses a wide variety of developing and developed economies (Office of the President 2016c; Office of the President 2016d). The NSP has a tailored approach toward each country based on their respective economies, relationships with the ROC, and potential for growth (Office of Trade Negotiations and Bureau of Foreign Trade 2016).

Tsai’s New Southbound Policy takes a comprehensive approach to building links with its target nations. Rather than simply reduce trade barriers and push domestic enterprises overseas, the policy seeks to actively fosters connections through soft power, supply chains, bridging regional markets, and people-to-people exchange (Office of the President 2016c; Office of the

President 2016d). In conjunction with classic legal approaches to trade liberalization, these linkages are designed to help Taiwan comprehensively integrate with NSP target countries' economies and to encourage those countries to see Taiwan as an attractive partner.

To establish these links, the NSP takes an all-of-government approach that coordinates the activities of cabinet-level ministries, including the Ministries of Foreign Affairs, Economic Affairs, Finance, Science and Technology, Health and Welfare, and Education, among several others (Office of Trade Negotiations and Bureau of Foreign Trade 2017). Together, they work to promote four kinds of activity between Taiwan and NSP countries: 1) economic and trade cooperation, 2) talent exchanges, 3) resource sharing, and 4) regional integration. Specific initiatives to do so vary widely in scope and aim. They include relaxing visa requirements, transnational regulation reconciliation, incentivizing student exchange, technology sharing, epidemic prevention, infrastructure projects, consultation and financing for firms moving to NSP countries, hosting international forums, humanitarian and developmental aid, and tourism promotion (Executive Yuan 2016). This is all to say that the New Southbound Policy's name undersells its ambitions. The NSP is not so much a single policy as it is a strategy for comprehensively realigning government resources to reorient Taiwan's economy toward South, Southeast Asia, and Australasia.

Distinctions from Previous Policy Iterations

As described in the previous chapter, each president before Tsai had a different approach to their respective "southbound policies." Scholar Ngeow Chow Bing provides a valuable framework for evaluating what makes them distinct. He divides them based on strategic

objectives, geographic scope, and policy dimensions (Ngeow 2017). Of these three, the latter two will be discussed here.

Table 1
Truncated Version of Ngeow’s Comparison of Dimensions
and Scope of ROC President’s “Southbound” Policies

Presidency	Policy Dimensions	Geographic Scope
Lee Teng-Hui (1993)	Economic, Political	ASEAN 6 (Maritime Countries and Vietnam)
Lee Teng-Hui (1998)	Economic	ASEAN members, Australia, and New Zealand
Chen Shui-bian (2000)	Economic, Political	ASEAN 6
Ma Ying-jeou (2008)	Economic	ASEAN members
Tsai Ing-wen (2016)	Economic, Cultural	ASEAN, South Asia, Australia, and New Zealand

Source: (Ngeow 2017, 100–118)

Regarding geographic scope, the most critical innovation in Tsai’s New Southbound policy is its addition of South Asia and the reintroduction of Australia and New Zealand.

Whereas Ma and Chen opted to dedicate more resources to targeting ASEAN specifically, the New Southbound Policy casts a far wider net of economies it targets.

More importantly, the policy dimensions are unique. Tsai’s integration of soft power into her New Southbound Policy is unique. Notable is her introduction of regional fora for dialogue and cultural exchange, with an emphasis on promoting person-to-person ties between Taiwan and NSP countries. The NSP also focuses on developing Taiwanese medicine, universities, and the tourist sector to attract visitors, students, and immigrants as a means to build Taiwan’s profile within NSP countries (Office of the President 2016c; Office of the President 2016d). It is through these efforts that Tsai’s New Southbound Policy attempts to build its so-called “sense of economic community.”

To this point, the NSP’s cultural efforts are at once subordinate to and working in conjunction with its economic measures. Whereas prior presidents’ southbound policies emphasized direct economic measures like trade liberalization, financial integration, and

government-backed offshore investment, Tsai's instead focused on a comprehensive model of economic integration. Rather than just allow comparative advantage and free trade to shift Taiwan's market, her New Southbound Policy enlists organs of government to specifically integrate into target countries' economies at the sector, enterprise, and human levels. The NSP's soft power efforts are meant to assist this effort by convincing target country populations of the advantages of working with Taiwanese firms or going to Taiwan for professional training and employment.

By these means, the NSP attempts to ensure Taiwan's national security. Not only does the NSP carry on the older policies' efforts of reducing dependence on China, but it also attempts to make target countries more dependent on Taiwan, all while growing Taiwan's economy. The NSP is a long-game policy: its efforts are methodical, it coordinates the efforts of many organs of government, and it tries to achieve a more comprehensive and holistic economic integration with target countries.

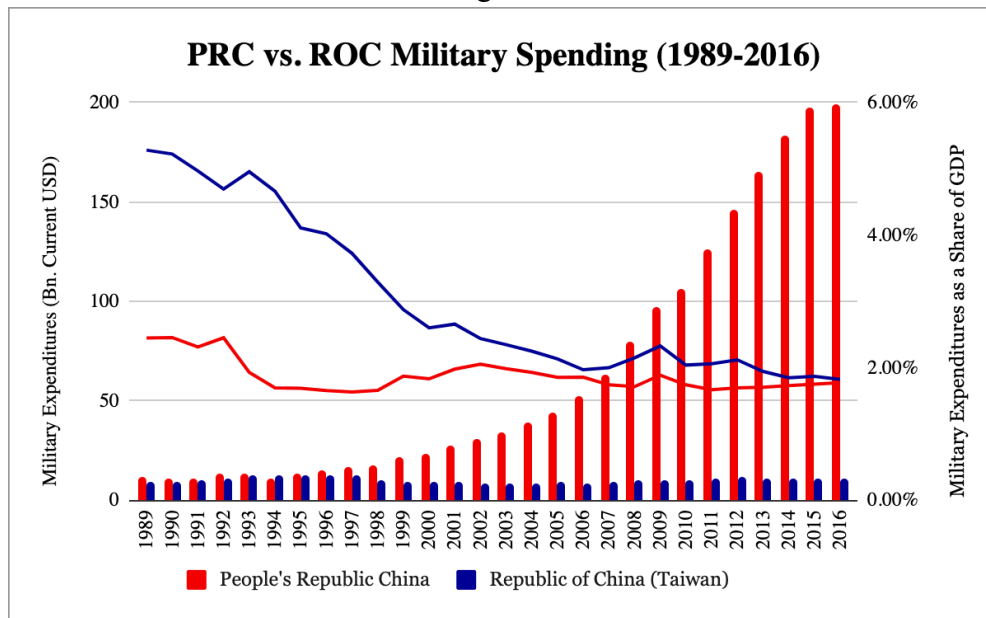
Political Forces

Taiwan's International Situation

Leading up to the ROC's 2016 election, the prospects for Taiwan's long-term autonomy were increasingly pessimistic. When considering Taiwan's relationship with China, the United States, and its surrounding region, Taiwan's relative power and influence were far weaker than in previous eras. These changing international circumstances were increasingly apparent to both Tsai and Taiwan's population when she was elected president in early 2016, and it was those circumstances that her foreign policy had to address.

As Ma’s Taipei grew closer to Beijing, Taiwan’s military and economic power fell further from Mainland China’s. Throughout the 1990s, Taipei’s military spending held at relative parity with that of Beijing (Figure 3). With the addition of American strategic ambiguity, the feasibility of forceful unification by the PRC was very low. However, in the late 1990s, Chinese military spending crossed an inflection point and grew dramatically. Taiwan’s \$8.6bn budget in 2000 briefly shrank, then grew a modest 12% to \$9.7bn in 2016. By contrast, the PRC’s \$22.2bn military budget grew nearly tenfold to \$198.5bn. In 16 years, China’s military budget went from almost tripling that of Taiwan to being greater than 20 times its size (SIPRI 2023).

Figure 3



Source: Stockholm International Peace Research Institute 2023

By 2016, though Beijing was still far from being able to credibly threaten a military takeover, the trends of its military spending were moving in that direction. Among the target areas for military modernization were developing next-generation air and sea assets, anti-access area denial tactics, and offensive air and rocket strike capabilities, all of which would be critical to PRC victory in cross-strait conflagration (Cordesman and Kendall 2016). At this point, it was

clear that the PRC had moved beyond competing with the ROC's military to focus on eroding the American military's advantages. Not only had Beijing never renounced the use of force to achieve unification, but it was also actively acquiring the means to do so at the time.

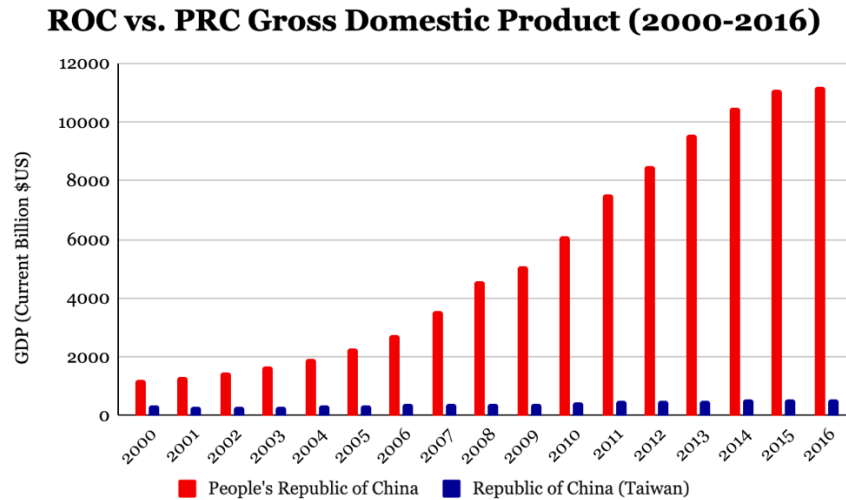
To this point, the assurances of American defense were also waning. Polling on American willingness to defend Taiwan and Taiwanese trust in American assurances is spotty and wavers depending on how the question is posed, but as a general principle, the gap in American military advantages vis-à-vis the PRC was shrinking (Gompert et al. 2016).

Compounding the declining relative strength of the U.S. military, when Tsai took office, the trajectory of American foreign policy commitment was relatively uncertain. When Tsai was inaugurated in May 2016, the American public's souring on overseas conflict was an open issue in the yet-decided American presidential election. With Trump campaigning on an anti-war message and Clinton distancing herself from failed military interventions, it was clear that the American war weariness was growing (Vance 2016).

War was not the only threat facing Taiwan. On the economic front, the ROC was increasingly dwarfed by the PRC (Figure 4). Whereas the PRC's economy was four times the size of Taiwan's in 2000, by 2016, it was 20 times larger than Taiwan's. Though China's economy grew rapidly, Taiwan's only saw modest growth, not even doubling in size by 2016, when China's had grown nine-fold (World Bank 2023). The PRC's boom made the ROC relatively less significant in the regional economy. Taiwan was once a major source of investment, trade, and skill to its neighbors, but it now had to compete with a maturing Chinese economy next door. Simultaneously, China's massive economy and linkages with Taiwan's meant that any market shocks or intentional coercion from the mainland would significantly harm the ROC economy. The magic of Taiwan's economic miracle from decades before was

long gone. Though Taiwan was still an Asian tiger, China’s enormous growth and investment overseas meant that Taiwan’s economic dynamism no longer had the purchase it did previously.

Figure 4



Source: Directorate General of Budget, Accounting, and Statistics, R.O.C. 2023e

This growing economic disparity fed into another risk to Taiwan’s continued autonomy: dependence. As Lin notes, it is a unique dilemma that Taiwan’s greatest geopolitical threat is also its closest economic partner. China’s economic gravity, common language, and expanding markets offer lucrative benefits to Taiwanese firms. However, the bilateral flow of FDI, trade, and human capital opened a variety of economic pressure points that Beijing could leverage to extract concessions—or force unification—from Taipei (Lin 2016).

As discussed in the previous chapter, excessive economic dependence on the mainland market is a longstanding concern for those opposed to unification with the mainland.

Lee and Chen’s overt attempts—as well as Ma’s lowkey attempt—to divert trade and investment toward Southeast Asia garnered only temporary success at best (Ngeow 2017). By the time Tsai took office in 2016, 23.1% of Taiwan’s total trade was with China, with ASEAN, the U.S., and Japan trailing at 15.4%, 12.2%, and 7.8%, respectively. More concerning, though, was that

between January 1991 and April 2016, 61.1% of Taiwan's foreign direct investment went to Mainland China (Jing 2017, 187–90).

Another worrying development was the decline of Taiwanese economic relevance in the region. During the 1990s, Taiwanese economic dynamism was an essential feature of the Lee government's strategy to ward off unification (Leifer 2001). By playing an active role in the surrounding region's economy, Taiwan could rely on its economic gravity to ensure that those countries had a vested economic stake in cross-strait stability. However, as Taiwan's neighbors have flocked to invest in ASEAN and South Asia, Taiwan's relative significance has shrunk. Though it did—and does to this day—play a critical role in the technology sector, its significance to Southeast Asian economies relative to China, Japan, and South Korea faded. By 2016, Taiwan's FDI only accounted for 3.1% of all FDI to ASEAN states compared to 5.9% from South Korea, 8.7% from the PRC, and 13.6% from Japan (ASEAN Statistics Division 2023). A lack of economic integration with the region indicated that the region was relatively non-dependent on Taiwan, just as Taiwan's dependence on China grew.

These points of weakness became more worrisome when the era of cordial relations under Ma reversed almost immediately after Tsai took office. Though Tsai was—and still is—more a moderate DPP president than Chen Shui-bian before her, China broke off formal channels of dialogue with Taipei almost immediately after Tsai took office because she refused to acknowledge the 1992 consensus (Hernández 2016). China was poised to follow up its carrots to Ma's KMT government with sticks for Tsai's DPP government.

To be blunt, Taiwan's long-term outlook in 2016 was not rosy. As Tsai entered office, Taiwan was weaker than ever relative to mainland China. Not only was the strategic logic for Taiwan's national defense unraveling with the growth of the mainland's military capability, but a

wave of investment and integration with the PRC's economy left it more vulnerable to economic coercion. Moreover, its lack of economic integration with Southeast Asia and overshadowing by neighboring economies left it less relevant to its neighbors than ever. As Tsai took office in 2016, it was increasingly clear that she would have to muster a response to these challenges to secure Taiwan's medium-to-long-term national security.

Taiwan's Domestic Situation

At the conclusion of Ma Ying-jeou's second term, the Taiwanese public was deeply unsatisfied with his government. Following a crushing defeat in local elections in 2014, then a sweeping national defeat in 2016 (Tiezzi 2014; Central Election Commission 2023b). In the KMT's place, the DPP surged to power nationally and won control of the legislative yuan for the first time in party history (O'Connor and Meich 2016). Total electoral victory, however, did not mean Tsai was at ease to govern as she wished. She and her party won the election on a promise of change, and to ensure her future political success, she would have to deliver on that mandate. As for Tsai's foreign policy, there were two pressing domestic issues at hand: the economy and nationalist backlash, and they would come to shape the framework and implementation of her New Southbound Policy.

From a birds-eye view, Taiwan's economy under Ma saw decent improvement despite the damage dealt by the 2008 financial crisis. Between 2008 and 2016, Taiwan's GDP grew at an average rate of 3.3% per year, and overall unemployment peaked with the recession at 5.85% in 2009, then declined to 3.92% by 2016 (DGBAS 2023c). Moreover, during Ma's term, the total value of net exports increased by 28.6 percent, or 3.2% on average annually. Overall, these macroeconomic indicators were resounding endorsements for Ma's policy of cross-strait

engagement and trade liberalization (DGBAS 2023b). However, these positive indicators also concealed deeper problems in Taiwan's economy.

Beneath the surface, there was significant discontent with how the benefits of economic growth were distributed. Youth unemployment remained high, having only moderately descended from 13.4% in 2008 to 12.6% in 2016, compared to 7.3% in 2000 (DGBAS 2023d). Moreover, wages had been stagnant, growing at an average annual rate of only 1.2% compared to 3.3% for GDP (DGBAS 2023f; DGBAS 2023e). Among the youth and wage earners, there was a growing sentiment that big business was the primary beneficiary of growing trade with and investment in mainland China. Young Taiwanese laborers were increasingly competing with cheaper wages and production costs in the mainland, all while prospects for employment in Taiwan remained poor.

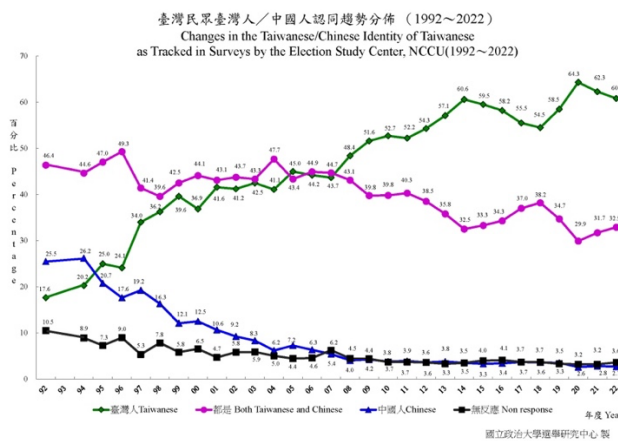
In response to this growing discontent, Tsai Ing-wen anchored her platform on economic issues. As the standard bearer of the party in power, the KMT's Eric Chu was forced to carry the burden of selling Taiwan's economic underperformance while Tsai used Ma's economic policies as a campaign wedge. As analysts noted at the time, her focus on Taiwan's domestic economy and employment was an effective contrast to Chu's focus on external economic relations with China (O'Connor and Meick 2016, 2).

At the same time, nationalism also played an important role in weakening the KMT's grip on power. As Ma continued his policy of economic and cultural engagement with mainland China, a growing section of Taiwan's population became concerned with the extent to which Taiwan was becoming economically integrated with the PRC. As mentioned in Chapter 1, Ma's 2013 Cross-Strait Service Trade Agreement became a particularly sharp sticking point among the Taiwanese public. Though the CSSTA was signed in 2013, the KMT's later attempts at

ratification sparked an enormous backlash in the form of the Sunflower Movement. As the bill was considered in 2014, hundreds of Taiwanese students occupied the legislative chamber for three weeks to halt its passage. The protests not only killed the agreement but also sparked a growing wave of scrutiny and protest against Ma’s close relations with the mainland (Ho 2018).

Though rooted in material politics, the Sunflower Movement was a nationalist movement. Numerous activist groups sprouted in its wake, and activism supporting Taiwanese independence surged as its proponents accused the Ma government of placing the ROC on a path to unification with the PRC (Ho 2018). Ho notes that polling from National Chengchi University in 2008 found that 48.4% of Taiwanese respondents identified as “Taiwanese,” and by the time of the Sunflower Movement in 2014, this number peaked at 60.6% before declining slightly to 58.2% in 2016 when Tsai was elected (Ho 2018). The polling (Figure 5) shows the inverse trend is true for respondents who identified as “both Taiwanese and Chinese” (Election Study Center 2023b).

Figure 5



Source: Election Study Center, National Chengchi University 2023b

Though Tsai learned from Chen’s political missteps to focus primarily on economic issues, her election was no doubt supported by this surge in nationalism (O’Connor and Meick

2016). Even though Tsai herself was a moderate on independence within her own party, she stood in stark contrast to the outgoing Ma and her opponent Chu's friendliness to Beijing. Even though she did not endorse formal independence, she took advantage of the radical support on her path to victory.

Historic electoral victories, however, demand historic political results. Though she was no populist, Tsai and her party rode a wave of widespread activism to win total government control in 2016. As her term began, she knew she would need to service these constituencies that brought her to power or risk alienating them in her reelection and future DPP campaigns. As such, domestic pressure to deliver the goods on fair economic growth and Taiwanese nationalism would have to be delivered for Tsai to keep her domestic support.

Constraints

As identified in the previous chapter, there are a number of constraints on what policies the Republic of China can implement. Some are structural, longstanding, and unique to Taiwan; others are political, temporary, and ubiquitous in any government. Before discussing the implications of Tsai's leadership, one must first understand the particular constraints on her power.

On the structural front, Taiwan's international illegitimacy continued to limit the extent to which it could act as a normal state by ratifying formal treaties, engaging in official dialogue, and participating in international organizations. Moreover, this structural disadvantage was compounded by Beijing pressuring other countries not to engage with the ROC government. As discussed in the previous chapter, this factor has pervaded prior administrations and limited the range of functionally viable policy options for the ROC.

Moreover, the structural restraints of Taiwan's democracy and separation of powers mean that leaders have to operate within the grace of the popular will and politically bargain through branches of government to deliver on specific policies. Chen was notably restrained in this regard due to his unpopularity and the opposition KMT's control of the Legislative Yuan (Leifer 2001).

Tsai Ing-wen, in this respect, was uniquely unconstrained when she took office. Though Tsai was assisted in her victory by a third-party candidate, James Soong, who split the KMT's vote, she handily defeated her two opponents with a landslide majority of 56.1%, compared to Chu's 31% and Soong's 12.8% (Central Election Commission 2023b). With the additional advantage of her party controlling the legislature for the first time in its history, Tsai was less institutionally constrained than Chen to embark on a foreign policy of her choosing. Had her party not secured the Legislative Yuan, she may have had no choice but to introduce a smaller-scale foreign policy initiative within the scope of her executive power.

As for the constraints more unique to Tsai, she had to worry about potential backlash to any policy she would choose to implement. Because Tsai ran a big-tent campaign, she naturally had many stakeholders to please in office. There was always the chance that any foreign policy initiative could cater to one while alienating another. These political stakeholders thus coalesce around the international and domestic political forces discussed above.

On the international front, she had to be wary that her foreign policy actions not be aggressive like Chen's, lest they provoke direct retaliation from the mainland or place potential partners in Beijing's crosshairs. Should she have attempted to confront Beijing directly, it would have certainly amplified Taiwan's nationalist fervor but also would have directly harmed her immediate foreign policy interests by further isolating Taiwan.

Domestically, she had to cater to the young, independence-leaning voters who demanded economic growth and a shift away from dependence on China or risk electoral abandonment in her next elections. However, direct reversals of the Ma government's agreements with Beijing were off the table as they risked further harming economic growth and inviting a backlash from Beijing. Indeed, though Tsai did not recognize the 1992 Consensus on which they were made, she respected all of Ma's ratified cross-strait agreements (Gao 2016; Mainland Affairs Council 2022). Moreover, a direct approach to undermining cross-strait economic integration through tariffs or capital controls may run the same risks, even if they did not necessarily violate the terms of prior trade agreements.⁵

When considered together, all these constraints considerably impacted Tsai's decision matrix. Taiwan's international status limited Tsai's foreign policy tool kit, but her personal menu of policy options was wider than Chen Shui-bian's, given her political mandate and control of the legislature. At the same time, international and domestic stakeholders would further constrain her options. She would not rationally provoke Taiwan's primary geopolitical adversary, nor could she afford to anger the array of moderate and radical domestic constituencies that elected her. She had mandates to deliver on the economy and nationalism, but a variety of lines she had to be wary of crossing. In aggregate, these incentivized Tsai to take a less confrontational political path—of which her New Southbound Policy is the centerpiece.

⁵ It should be noted that in December of 2020, Tsai did later implement capital controls on Chinese investment in Taiwan on the basis of national security. However, this was done almost year after her re-election when she was already effectively a lame duck. (Oung 2020)

Leadership

Just as ship captains do not get to choose the winds they sail in, world leaders do not choose the circumstances under which they govern. Heads of state must leverage their limited power and influence to respond to the forces acting upon them and their countries while also pursuing their ideological or personal objectives. Political leaders, therefore, must examine the storms ahead of them, the wind behind them, and the currents beneath them to chart an ideal path to their destination. Depending on their objectives, some may sail into the political winds in a beeline to their destination, whereas others choose to abide unfavorable conditions and avoid political storms.

Moreover, leaders never rule alone and generally prefer to remain in power. Whether they are elected by voters or take power through an officers' revolt, political leaders must serve those who put them in power or risk being removed. Still, a given leader's approach to serving these constituencies and achieving their ideological objectives is only viable so long as their country's power permits them. Some countries have stronger militaries and more plentiful resources than others. Thus, a given country's political situation, institutional composition, and limited resources act to constrain how leaders can feasibly exercise their power.

Exogenous and endogenous forces, and constraints are slow-changing and often unstoppable. Political leaders, however, are dynamic agents operating within globe-spanning trends. It is incumbent on world leaders to respond to international forces and domestic political demands within their constraints. Thus, it is by threading the needle through each of these that leaders choose strategies and subordinate to those strategies: policies.

In the case of Taiwanese foreign policy—and Tsai Ing-wen's New Southbound Policy, in particular—leadership is a critical factor. Politicians' personal agency, beliefs, goals, and career

security significantly influence policy decisions. That is to say, when compared to the slow-changing and unstoppable trends of Taiwan’s foreign and domestic situations, leaders are the “loosest” variable in Taiwanese foreign policy. Thus, it is critical to understand Tsai’s beliefs, goals, and political career.

With her international and domestic pressures established, Tsai Ing-wen had to respond to these forces. From one side, the horizon for Taiwanese continued autonomy—let alone independence—was shrinking. With overwhelming—and growing—military and economic power across the Strait, a lack of regional engagement, and doubts about American commitment, Tsai would have to decide the best strategy to extend the lifespan of Taiwan’s de facto independence. At the same time, however, she had to face a political audience at home that demanded economic change and was increasingly opposed to closeness with the mainland.

Herein, Tsai’s person becomes essential. She had extensive experience in government, first under Lee as a trade policy advisor, then consultant member of the Mainland Affairs Council, then as a consultant member of the National Security Council. Under Chen, she served as chair of the Mainland Affairs Office before being elected to the legislature in 2004 and then appointed to Vice Premier in 2006 (Office of the President 2016a; Office of the President 2016b). Having been a foreign policy insider during two presidencies, she naturally had extensive knowledge of the levers of state before she was elected president. She, therefore, ought to have been closely familiar with the successes of Lee Teng-hui’s caution and the failures of Chen Shui-bian’s bombast.

Moreover, Tsai was finely attuned to the DPP’s objectives, constituency, and party prerogatives. Following Ma’s election, the DPP spent eight years in the political wilderness. Of those six, Tsai was the party’s chairwoman (Democratic Progressive Party n.d.). When she took

control of the DPP in 2008, the party had just been electorally shattered in the presidential and legislative elections and was scarred by Chen's missteps. Analysts attributed these losses to the DPP excessively catering to its radical base and ignoring centrist concerns (Dumbaugh 2008). After eight years and a failed presidential bid of her own in 2012, Tsai led the DPP to landslide victories across the board with a broadly appealing political platform. Under her leadership, the DPP had transformed from a radical party that never won more than a legislative plurality to a more moderate party that won its first-ever outright legislative majority (O'Connor and Meick 2016). Naturally, her lessons from broadening the party's appeal would continue into her presidency.

Compared to Chen and many others within the DPP, Tsai was and is a more pragmatic supporter of independence. Though her party officially supported Taiwanese independence, Tsai did not advocate for a *de jure* declaration on the campaign trail (Solomon 2016). She rejected the 1992 consensus but frequently reiterated that her goal was to maintain the status quo and stabilize politics (Chen 2015; Loa 2016). She also was clear that excessive dependence on China and the Ma government's policy could not stand (Fang 2015). To read between the lines and in the context of recent history, Tsai was being clear to voters that she had no intention of taking up Chen's hardline on Taiwanese sovereignty and independence, but she still intended to preserve Taiwan's *de facto* independence.

Though we can never know what happened in Tsai's decision room, knowing her political experience, general foreign policy objectives, governing style, and campaign stances, one can intuit her strategic logic for introducing the New Southbound Policy.

Tsai needed to put distance between Taiwan and China, but also had to be electable—and for that matter, re-electable—to both her base and Taiwan's "turquoise" middle. Therefore,

she could not trammel on economic growth through aggressive decoupling nor not offer anything to decrease cross-strait dependence. When Time Magazine asked in 2015 how she planned to appeal to her base constituencies versus the middle ground she had to win, she pointed out that her “challenge is to produce something that is sensible to both sides without being considered as a traitor to the friends we used to be with when we were an opposition party” (Rauhala 2015). We can therefore posit that Tsai’s moderate independence-leaning foreign policy is her response to these political challenges, and her New Southbound Policy is a natural extension of this political tactic of moderation.

Strategy and Policy

Here, it is necessary to return to Tsai’s menu of foreign policy options and discuss why she chose her New Southbound, how it factors into her broader foreign policy strategy, and how it responds to the aforementioned forces and constraints.

Among Tsai’s policy options, some were unfeasible due to Taiwan’s status: no treaties, no alliances, and no political participation in international organizations. There were also several options Tsai could not pursue because they would be counterproductive to her ideological objectives and political self-interest. Should she wish to maintain popular support and future electability, she could not harm the economy or betray her nationalist base. Therefore, sharp export and capital controls were off the table, as were any attempts at political appeasement toward Beijing. Moreover, even if these options did not raise electoral liabilities, they would not necessarily work. Had Tsai chosen to break off Ma’s economic agreements with the mainland and immediately implemented export controls, these measures would have likely sparked backlash from Beijing. Appeasement, whether through political or economic concessions, may

have provided Tsai reprieve from PRC pressure but strengthened Beijing's hand on unification later down the road.

Thus, Tsai needed to engineer a policy solution that could degrade the PRC's ability to economically coerce Taiwan without provoking backlash from Beijing. The policy not only needed to deliver to voters who opposed economic closeness with Beijing but also to voters who demanded general economic growth. In the long term, the policy also needed to—at a minimum—stem Ma's drift toward political unification with Beijing. At its maximum, an ideal policy would aspire to reverse that trend and improve the prospects of eventual political independence.

The New Southbound Policy was designed as an innovative solution that could meet—or at least be feasibly marketed to voters as meeting—all of these above conditions.

On the international and geostrategic front, the New Southbound Policy was a moderate approach that advanced Taiwanese security while sidestepping direct confrontation with Beijing. Tsai had no delusions that *de jure* independence could be safely achieved in her tenure, but she was intent on ensuring that Taiwan would not be unwillingly subsumed into the PRC. Rather than directly confront China and risk Taiwan's economy or military security, Tsai kept China at arm's length and instead focused on mitigating the PRC's pressure points on China. As Jing (2017) points out, her New Southbound Policy seeks to advance the strategic goal of hedging Taiwan's security by placing Taiwanese economic eggs in other baskets abroad. When followed to its logical conclusion, this hedging strategy would allow Taiwan to reduce dependence on China, build support in NSP target countries, and grow its economy without appearing so rebellious as to provoke backlash from the mainland.

It is on the domestic front that this thesis builds on existing literature: the New Southbound Policy was not chosen on its national security merits alone. The NSP also directly served her political electoral constituencies and helped to deliver on her domestic political agenda.

From the perspective of Tsai's electoral constituencies, the NSP was a good fit for her big tent. Given that it followed a historical mold of engaging with Southeast Asia, it would not require a significant logical leap to sell the plan to voters. The New Southbound Policy's methods were also inoffensive enough to avoid alienating swing voters who chose Tsai on her economic platform but also bold enough in its aspirations that it could appeal to independence supporters.

To swing voters, the New Southbound Policy is very pragmatic compared to Chen's more bombastic continuation of Lee's Southbound Policy. Rather than alienate potential allies or pit Taipei against Beijing, the policy is at once politically lowkey and an overwhelming effort. The turquoise voter, therefore, would not have to worry about the risks of forcibly decoupling from China and could rest at ease knowing it would not inflame Chinese and Taiwanese nationalist tensions as Chen's foreign policy did. Moreover, by opting to give carrots to firms that went to NSP target countries rather than giving sticks to firms that went to the mainland, the NSP avoided alienating the business community.

To Tsai's pro-independence base and supporters from the Sunflower Movement, the NSP would serve as a positive step. It demonstrated a real effort to put economic distance between Taiwan and China without running the risk of plunging the already stagnant economy into a trade war. Should it deliver on its goals, it would help to support jobs, innovation, and economic growth that would hopefully spill over for wage earners. In addition, because it actively applied

Taiwanese soft power, the New Southbound Policy would please these independence-leaning constituencies by drawing greater international attention to Taiwan through its charm offensive.

However, the New Southbound Policy was created not only because it could offend few and please many but also because it was an innovative solution that could simultaneously advance Tsai's domestic agenda of economic growth. As previously discussed, the NSP is distinct in its expanded geographic scope and introduction of soft power and micro-level economic engagement. Because the policy targeted new markets, introduced new methods to achieve economic integration, and offered soft power to complement economic policy, the NSP could foreseeably boost Taiwan's economic growth.

As for the NSP's relationship to Tsai's constraints, they both enabled and restrained the policy's scope. Because Tsai had the benefit of a unified government, her NSP was able to target a wide variety of government bureaus and earn legislative support, whereas Chen's mainly relied on executive authority. The NSP also comports with Taiwan's international constraints by operating on the unofficial and subnational levels.

Chapter Conclusions

This thesis' core argument is that Tsai Ing-wen's introduction of the New Southbound Policy was substantially driven and shaped by Taiwan's domestic politics. As with any foreign policy initiative, the NSP was developed as a response to foreign stimuli, but to ignore the role that domestic factors played in shaping it is to misunderstand the process of Taiwanese foreign policymaking.

Whereas Taiwan's leaders set foreign policy agendas and identify key international objectives, how they design foreign policy is shaped by constraints on those leaders as well as

international and domestic circumstances. Tsai decided to pursue an independence-leaning foreign policy. However, her viable options for doing so were limited by the ROC's geopolitical status, the tenuous balance of Taiwan's national security, and the various foreign and domestic political audiences she had to please.

On this note, it is essential to recognize the agency and circumstances of Tsai Ing-wen. As a political leader, she deftly managed to channel both her domestic and international agendas through a single signature initiative. Her ability to take advantage of politically fortunate and strategically unfortunate circumstances enabled her to implement her wide-reaching vision. Tsai was lucky to be in an electable position during a popular movement and wave of discontent with the KMT.

In contrast to Tsai, Chen Shui-bian was both unlucky and unsavvy. He was elected by a narrow plurality in a three-way race, and the KMT was too deeply rooted for the upstart DPP to wrest away control of the legislature. As he catered heavily to his base and took a hardline on Taiwanese independence, his policies created cross-strait instability and diplomatic isolation that alienated moderates.

Though Tsai successfully aligned her domestic and international agendas within her political constraints, it is an open question as to whether future Taiwanese leaders will be able to do the same. This chapter's line of analysis thus opens a range of implications for how Taiwan's foreign policymaking process should be understood. The following conclusion thus explores those implications and their significance for the future of cross-strait relations.

Conclusion

Tsai Ing-wen's New Southbound Policy is the product of the messy interplay of domestic and international affairs. On its face, the policy pursues her objective of advancing Taiwan's national security by hedging against China's economic coercion. However, its function and scope are shaped by Tsai's domestic political circumstances and structural constraints. As a democratically elected leader, Tsai introduced the New Southbound Policy to achieve her foreign policy objectives while simultaneously appealing to her electoral constituencies, all while operating with the limited set of foreign policy tools available to the ROC.

Moreover, Tsai's New Southbound Policy sets her foreign policy legacy apart from her predecessors. She introduced new methods of economic engagement and integrated soft power as a plank of her foreign policy strategy. Tsai is also the first DPP president to offer a coherent and legislatively backed foreign policy agenda. Given that the foreign policy is the axis separating the KMT and DPP, Tsai's pragmatic approach and implementation of the NSP demonstrates that the DPP had matured from a radical independence party to a more pragmatic—and electable—big tent. Though the long-term outcome of her foreign policy is yet to be seen, her improvement on Lee's foreign policy and departure from those of Chen and Ma are remarkable in their own right.

Given that Taiwan's domestic politics shaped the creation of Tsai's New Southbound Policy, the story of the policy's creation provides valuable insights to policymakers, strategists, and analysts around the world. It opens new speculative questions about how Taiwanese foreign policy will develop moving forward and how foreign observers ought to conceptualize Taiwan's foreign policy. This conclusion briefly explores those implications and questions.

The all-encompassing implication here is that Taiwan's domestic affairs should be a crucial factor in analysis of the ROC's foreign policy. This is not a controversial statement. Indeed, most theoreticians, academics, and analysts would agree that any country's foreign affairs are inexorably entangled in its domestic affairs. However, this is especially the case for Taiwan.

Nationalism, trade, and national security are always politically relevant issues in democratic countries; however, they are not always electorally salient, nor are they regularly the most significant fault lines between political parties. By contrast, the divide between unification and independence is the central axis of Taiwanese politics. Whereas most countries' political parties are sorted from left to right depending on economic and social issues, Taiwan's are sorted from green to blue depending on their attitudes toward the independence-unification divide. Due to the salience of this issue, Taiwan's domestic politics are particularly sensitive to foreign affairs. Though this sort of sensitivity can be challenging to quantify, the extent to which foreign policy issues swayed Lee, Chen, Ma, and Tsai's elections proves this to be the case.

Where then do this thesis' arguments touch on this issue? In its discussion of the New Southbound Policy, it provides an example of a juncture at which those domestic and foreign affairs interacted to change Taiwan's foreign policy and its state behavior. Whereas foreign policy analysts tend to focus on the pure realist logic by which states find the optimal path to achieve their objectives, this thesis shows that a wider variety of factors influences Taiwan's foreign policymakers. That geostrategic logic is only one part of the explanation for Taiwan's behavior as an international actor. With this being the case, it is worth examining how these findings affect actors with a vested stake in the development of Taiwan's foreign policy.

For the United States, it is essential that analysts and strategists take Taiwan's domestic situation into account when deciphering Taiwan's behavior. Well-meaning think tank scholars in Washington often scratch their heads at why the independence-leaning Tsai has focused on a wide-reaching overseas economic and soft power push when Taiwan ought to be investing in its national defense capabilities. This tendency to flatten Taiwan's decision-making into purely rational and geostrategic thinking ignores Taiwan's vibrant domestic politics and how the world looks to a politician in Taipei versus a strategist in Washington. Should American analysts be more readily able to look at the world from a Taiwanese president's eyes, they would have a far firmer grasp on why Taiwan acts the way it does and thus be able to respond accordingly.

To Beijing, this thesis' line of analysis reinforces a number of lessons that have been learned over the past several decades. Taiwan's democratization has made it very reactive to Beijing's actions, particularly during election seasons. Though Xi Jinping and the CCP have their own domestic audiences to appeal to, they must also consider how their actions affect the state of domestic politics in Taiwan. Even as Beijing has alternately offered carrots and sticks to entice, intimidate, or deter Taiwan, the complexity of Taiwanese politics means these efforts have variably succeeded and backfired. The PRC favors the unification-leaning KMT to govern Taiwan, but even the most amenable KMT politician is still limited in the extent to which they can compromise with Beijing without inciting a nationalist backlash. This, therefore, complicates Beijing's path to its preferred outcome of peaceful unification.

Importantly for both the United States and China, however, is that Taiwan will soon enter another critical juncture: the 2024 presidential election. As shown in this thesis' first chapter, major foreign policy shifts come into play every time a president enters office, meaning that for

the purposes of Taiwanese foreign policy, the next ROC president is currently the loosest variable in cross-strait relations.

Campaigning has yet to begin, but the election is set for January 13th, 2024, with the inauguration on May 20th (C.H. Huang 2023). Taiwan's major parties have yet to nominate candidates, but Taiwanese politicians presume that the DPP will nominate current Vice President Lai Ching-te, while the KMT nomination is still a toss-up among a pool of candidates (Lin 2023; Hioe 2023). Further complicating this race, former Taipei mayor Ko Wen-je seems likely to run as a long-shot third-party candidate under his Taiwan People's Party (TPP) (Guo 2023).

It is difficult to speculate which issues will be the most salient to voters next January, but foreign policy and economics will undoubtedly be in the mix. As these issues take shape, the framework proposed in the introduction could help predict how Taiwan's next president will plan their foreign policy. Particularly in the crucial gap between election day and inauguration, leaders around the world will have to speculate how Taiwan's next president may change Taiwan's foreign policy. Depending on who is elected, which constituencies they represent, Taiwan's security situation at the time, the salient issues in the election, and the strength of the new president's popular mandate, Taiwan's foreign policy could go in many directions.

It is difficult to predict exactly what each candidate may do, considering that none have been officially nominated nor released campaign platforms. However, some general predictions can be made. Another DPP president will likely try to maintain Tsai's resistance to Beijing's pressure to unify, but it is unclear if they would necessarily follow Tsai's same strategy. The presumptive candidate, Vice President Lai, has historically taken a harder line on independence than Tsai, but in preparation for his candidacy, he has emphasized his determination to maintain cross-strait peace (Wu and Lin 2019; C.M. Huang 2023).

The KMT, on the other hand, seems poised to return to Ma's rapprochement should they return to power. In February of 2023, the KMT sent a delegation to mainland China and received the first mainland delegation since the outbreak of COVID-19 (Chung 2023; Davidson 2023). Ma Ying-jeou also became the first ROC president to visit the mainland when he took a historical trip at the end of March (Cheung and Magramo 2023). With outreach beginning now, it seems likely that the KMT will sell the public on returning to the era of cross-strait peace and stability under Ma and pursue closer ties to Beijing.

Still, even if each party's intentions are broadly clear, the way in which a new KMT or DPP president may choose to pursue their respective objectives will be significantly shaped by domestic political forces and constraints on their power. Depending on the state of the economy, nationalist sentiment, and the new president's popular mandate, they will likely have to adapt their tactics to fit their political environment at home. One interesting wildcard is the prospect of divided government: polling indicates that the third-party Ko Wen-je will likely lose, but his vote count could be high enough to limit the actual winner to a popular plurality (Tsai 2023). Moreover, if his Taiwan People's Party performs well in the election, it could prevent any party from gaining a legislative majority. Could Taiwan's next president be hobbled like Chen Shui-bian was? Or will Taiwan's next president have the mandate and institutional latitude to pivot the ROC's foreign policy entirely?

Regardless of who wins, the question of leadership and policy options remains. Tsai was a uniquely savvy politician that was able to use her limited policy tools in an innovative way to dovetail her domestic and international agenda through her signature foreign policy initiative. Tsai's New Southbound Policy thus set her foreign policy apart because she reconfigured old methods and introduced new ones to pursue her objectives. This was both a matter of skill and

circumstance. Will future Taiwan's next president be as tactically savvy and situationally fortunate as Tsai was? Will they enter office with an expansive toolbox of policy options? Or will domestic and international forces shrink that toolbox? Will Taiwan's next president be able to innovate regardless of the hand they are dealt?

On one last note, this thesis opens several new avenues for future research. One feature of Taiwan's domestic politics omitted from this analysis was Taiwan's intra-party factional disputes. Taiwanese political parties have particularly strong factional groups, but even Chinese-language reporting on these factions is sparse and out-of-date, let alone available in English. Future scholars should expand on this thesis' proposed framework to include intra-partisan contests and intra-bureaucratic competition.

Looking ahead, the stakes of a cross-strait conflagration ought to remind the world to carefully consider Taiwan's actions in their analysis of the Taiwan Strait. As a case study, Tsai Ing-wen's New Southbound Policy highlights the significance of domestic politics and constraints in shaping the ROC's foreign policy. Analysts, academics, and policymakers must therefore work to incorporate this thesis' framework of analysis or else risk misreading why Taiwan acts as it does. With a new leader soon to take the stage, Taiwan's foreign policy posture will shift again. Understanding how and why will be essential for maintaining peace in the Taiwan Strait.

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