



IMSIS

International Master
Security, Intelligence
& Strategic Studies



**Erasmus
Mundus**

From dependency to independence

How the United States supports the Taiwanese military in
defending against a potential Chinese invasion

December, 2023

2685526 (G) 21109583 (D) 95949903 (C)

Presented in partial fulfilment of the requirements for the
Degree of International Master in Security, Intelligence
and Strategic Studies

Word Count: 22,037 words

Supervisor: PhDr. JUDr. Tomáš Karásek, Ph.D.

Date of Submission: 10 December 2023

Table of contents

I	Introduction	3
II	Methodology	5
III	Literature Review	13
IV	U.S.-Taiwan Strategic Partnership	45
	a. Political Status of Taiwan	45
	b. U.S.-Taiwan Cooperation History	51
	c. Common Adversary of the U.S. and Taiwan: China	53
	d. Importance of U.S.-Taiwan Strategic Relationship	56
V	Taiwan's Overall Security Situation	62
	a. Taiwan Armed Forces Overview	62
	b. China's Military Overview	64
	c. Challenges of Taiwan's Military	65
VI	The Security Policy and Defense Strategy of the United States	
	Towards Taiwan	74
	a. Arms Sales to Taiwan	74
	b. Military Deterrence in Waters Around Taiwan	76
	c. Strategic Clarity and Strategic Ambiguity	79
	d. Promoting Asymmetric Defense	82

e.	Providing Military Assistance to Taiwan	84
f.	Cultivating Interoperability of Taiwan's Military	87
g.	U.S. Strategic Deployment Around Taiwan	89
VII	Challenges in U.S. Security Policy Toward Taiwan	94
a.	Changes in the U.S. Political Environment	94
b.	Increased Chinese Military Power	94
c.	Economic Dependence on China	95
d.	Ethnic Identity in Taiwan.....	97
e.	U.S. Skepticism in Taiwan.....	97
f.	Taiwan Seeking Independence	102
VIII	Conclusion	104
IX	Reference	109

I. Introduction

Taiwan, located in the First Island Chain, has been the first line of defense against the expansion of communist power since the Cold War. Facing the rise of China, which claims Taiwan as its breakaway province and does not renounce the use of force for reunification, Taiwan's security issues have increasingly gained attention in the field of strategic security. Since Trump's administration, deteriorating U.S.-China relations and actions of conflict and alliance have heightened tensions in East Asia. In this standoff, Taiwan's unique position at the center of conflict has been re-emphasized. (Amonson & Egli, 2023)

Although the U.S. does not have official diplomatic relations or a military alliance with Taiwan, under the U.S. domestic law, the Taiwan Relations Act, the U.S. is obligated to maintain Taiwan's self-defense capabilities.(H.R.2479, 1979) Moreover, Taiwan's strategic significance in economics, geopolitics, and ideology makes its de facto independence closely intertwined with U.S. interests in the Asia-Pacific region. (The Economist, 2023) Since the pro-U.S. Tsai Ing-wen administration took office in Taiwan, the relationship between the U.S. and Taiwan has rapidly deepened. In 2022, the U.S. Congress included the Taiwan Enhanced Resilience Act in the National Defense Authorization Act for Fiscal Year 2023, aimed at improving Taiwan's defense capabilities, and granted Taiwan the status of a major non-NATO ally.

However, Chinese President Xi Jinping emphasizes that unifying Taiwan is essential to the "great rejuvenation of the Chinese nation" and has stated a willingness to use force to achieve this goal. (Xinhua, 2017) (Bush, 2017) Meanwhile, China's military spending has been growing annually, with an increase of about 7% each year since 2020. Following U.S. House Speaker Nancy Pelosi's visit to Taiwan in August 2022, the People's Liberation Army immediately surrounded Taiwan and conducted a seven-day joint military exercise to assert sovereignty and intimidate Taiwan. (Kuo, 2022) (Pollard and Lee, 2022) Facing China's continuous military expansion and strong territorial claims on Taiwan, the U.S. strategy to assist Taiwan's defense will inevitably face significant challenges from China.

The purpose of this paper is to analyze the informal partnership between the U.S. and Taiwan, as well as the objectives of U.S. policy towards Taiwan, while also envisioning the various challenges that U.S.-Taiwan relations will face. The paper will primarily analyze from political and military perspectives, providing insights and discussion points for scholars studying U.S.-Taiwan relations and security policies.

II. Methodology

a. Research Question

Analyzing U.S. security policy towards Taiwan, including developments and challenges.

b. Research Background and Purpose

Since Tsai Ing-wen's administration took office in Taiwan, the relationship between the United States and Taiwan has significantly improved. For instance, the Trump administration passed the Taiwan Travel Act in 2018, allowing mutual visits between officials at all levels from the U.S. and Taiwan. Nancy Pelosi, Speaker of the U.S. House of Representatives, visited Taiwan in August 2022, becoming the highest-level U.S. official to visit Taiwan in 25 years. Additionally, the Biden administration's National Defense Authorization Act 2023, passed at the end of 2022, designated Taiwan as a major non-NATO ally and authorized military assistance to Taiwan. These policies symbolize Taiwan as a major ally of the U.S. in Asia, despite the lack of formal diplomatic relations. This paper aims to explain the unofficial partnership between Taiwan and the U.S. and analyze the significance of U.S. policy towards Taiwan. It also attempts to summarize and integrate the challenges to bilateral relations under China's involvement in U.S.-Taiwan relations.

c. Research Design

i. Qualitative Research

This study primarily adopts a qualitative approach, using a literature review as the main method. This involves collecting and analyzing a vast array of literature to establish an understanding and perception of U.S.-Taiwan relations. The literature selected will primarily be from publications post-2016, marking the rapid development of U.S.-Taiwan relations since Tsai Ing-wen's administration. The main sources for literature analysis will be think tanks, government departments, and academic institutions. The study will pay special attention to political, economic, and military areas that significantly impact U.S.-Taiwan relations, using international relations theories to explain the current political situation in East Asia. Additionally, the study will focus on renowned scholars and military practitioners with practical experience in U.S.-Taiwan relations, analyzing their perspectives to enhance practical insights and provide more realistic analyses.

ii. Quantitative Research

In terms of quantitative research, considering the research question includes analyzing U.S. security policy towards Taiwan, relevant data on Taiwan's defense will be collected and compared, such as military spending, recruitment ratios, and weapon quantities. By analyzing these data differences, the development of Taiwan's defense capabilities will be assessed. Furthermore, public opinion survey data will be used to argue the political status of Taiwan, enhancing the credibility of the analysis. Due to the lack of resources to

conduct extensive public opinion surveys, data from non-profit public opinion research organizations in Taiwan will be used to avoid excessive political interference and maintain the credibility of the survey results.

d. Data Sources:

i. U.S. and Taiwan Government Public Documents:

U.S. government legislation not only reflects the stance of the U.S. government but also regulates the direction of its foreign relations, offering high credibility. Therefore, analyzing important U.S. acts related to Taiwan, such as the Taiwan Relations Act and the National Defense Authorization Act, is a crucial tool in addressing research questions. Moreover, reports published by the White House and the U.S. Department of Defense typically represent the views of the U.S. government and military, elucidating current or impending strategies. These are useful for understanding strategic directions and for making informed analyses and predictions. Analyzing Taiwan's foreign statements and legislation clarifies the Taiwanese government's diplomatic stance. Additionally, studying public records from Taiwan's legislature and inquiries to administrative officials can shed light on Taiwan's internal political, military, and economic status.

ii. US and Taiwanese Think Tank Reports:

This study will utilize reports from renowned U.S. think tanks, including

but not limited to the Center for Strategic and International Studies, Brookings Institution, and RAND Corporation. These think tanks have long analyzed U.S. foreign affairs, and many scholars study U.S.-Taiwan relations. Many researchers have backgrounds in politics and the military and maintain good relationships with U.S. political figures, lending credibility to their perspectives. From Taiwan, reports from the Institute for National Defense and Security Research, which focuses on defense strategy and often features researchers with military backgrounds, will be considered. Their perspectives on military strategy are original and credible. The frequent reports from these think tanks on U.S.-Taiwan relations, policies, and military issues concerning the U.S., Taiwan, and China reflect the current state of East Asian international affairs and are highly valuable. Analyzing and comparing the viewpoints of these think tank scholars will compensate for any shortcomings in my personal perspective.

iii. Academic Works on International Relations and Security:

I will reference academic works on international relations to analyze U.S.-Taiwan relations. These works include political theory literature introducing East Asian international relations and academic journals analyzing East Asian political and military situations. When selecting books, I prefer those published by renowned academic institutions and written by authors with significant academic prestige and practical

experience. These works are generally characterized by clear logic and incisive discourse. Analyzing the academic works of renowned scholars enables me to efficiently grasp the academic development in international relations and security fields. The theories repeatedly validated in practice by these scholars will help construct my understanding and perception of U.S.-Taiwan relations and East Asian politics.

iv. News Media:

For important current events and scholarly commentary, I will use well-reputed and long-standing media sources, such as Foreign Affairs Magazine, War on the Rocks, Wall Street Journal, The Washington Post, The Economist, Reuters, and Central News Agency. These media outlets generally uphold journalistic ethics and emphasize fact-checking, making them less likely to publish erroneous content, hence offering higher credibility.

e. Analysis Method

Since this paper predominantly adopts qualitative research methods, I will use three analysis methods: Comparative Analysis, Case Study Analysis, and Narrative Synthesis:

i. Comparative Analysis

After reading different literatures, I will compare the arguments in these documents, noting whether there are universally agreed views in the field

of international relations, or whether there are conflicts or differing interpretations of policies. For example, I will explore divergences within the U.S. diplomatic academia on clear versus ambiguous strategies, and debates over whether helping China's economic development could lead to a democratic transition in China. After attempting to understand the logic behind each argument, I will derive points that align with the reality of developments. Additionally, by comparing how different documents describe the same event or phenomenon, I can gain a multi-faceted understanding of the event, thereby avoiding misjudgments and analytical errors due to insufficient background knowledge.

ii. Case Study Analysis

I will pay special attention to policies and events that have had a significant impact on U.S.-Taiwan relations and intensify the analysis of these policies and events. For instance, the signing of the Taiwan Relations Act, the emergence of the pro-U.S. Tsai Ing-wen administration, and the formulation of NDAA 2023. By analyzing key policies and events, this study will more efficiently delve into the subject and find advantageous perspectives for analysis, avoiding the risk of the research becoming unfocused.

iii. Narrative Synthesis

Based on the literature I select, I will summarize their arguments through a

review process, trying to find commonalities in their discourse. I will use these common concepts to explain the current political situation, such as attempting to explain the U.S. strategy in the Indo-Pacific region, the relationships between the U.S., China, and Taiwan, and the impact of U.S. security policy on Taiwan's security.

f. Research Limitations

i. Limited Data

Many documents involving military capabilities and strategic planning are classified, making it difficult to access relevant information. This could lead to insufficient reference materials and hinder precise analysis.

ii. Subjective Judgement

As a Taiwanese, my emotional bias towards Taiwan might affect my value judgments related to the country, potentially compromising objectivity in analysis.

iii. Lack of Professional Knowledge

Having never served in the military, I might struggle to accurately discern the reliability of technical information related to weapon performance. This lack of knowledge could hinder my ability to understand the impact and implications of such technologies on the international community.

iv. Language Limitations

My proficiency is limited to Chinese and English, restricting my access to literature published in other languages and thereby limiting my sources of information.

v. Strength of Relationships

One of the most effective ways to address a problem is to directly inquire with the involved parties. For instance, in issues involving U.S.-Taiwan politics, consulting politicians who manage these areas would be ideal. However, due to my limited political stature, I am unable to directly question such political figures and must rely on secondary sources for research.

III. Literature Review

This paper, through analyzing the strategic relationship between Taiwan and the United States, seeks to understand the U.S.'s security policy and challenges regarding Taiwan. Therefore, the literature review of this paper will list and review academic works, think tank reports, government documents, and expert comments relevant to these topics.

In Kenneth Waltz's *Theory of International Politics*, Waltz posits that the international system is anarchic, with the primary aim of states being to ensure their own survival rather than to endlessly expand their power. The anarchic nature of international society compels states to focus on their security and the balance of power in international relations. States maintain international stability by balancing powers that pose potential threats, which can be achieved by enhancing their own military strength or forming alliances against potential threats. (Waltz, 2010) Waltz also mentions in his book *Man, the State, and War* that war is influenced by three levels: the individual, the state, and the international system. Aside from the psychological factors of individuals and the political and economic systems of states that may influence the occurrence of war, the main reason for war in the international community is its anarchic state. That is, the absence of a global authority to mediate disputes leads nations to perceive each other as threats and to compete and conflict with one another for their own survival. (Waltz, 2018)

Stephen M. Walt further elaborates on Waltz's theory in his book *The Origins of Alliances*, stating that in the face of external threats and the anarchic international society, states cannot depend on the goodwill of others for survival, leading them to seek alliances to counterbalance threats. Threats are assessed based on overall strength, geographical proximity, military capability, and intentions of aggression, with the intent to aggress being the most critical criterion. In forming alliances, regimes with similar ideologies tend to support each other's values, and with a higher basis of mutual trust, they are more likely to form alliances. Additionally, providing economic and military aid can also lead to alliances, as the recipient becomes dependent on the benefactor, tightening bilateral relations and leading to alliance formation. (Walt, 2007)

In Michael W. Doyle's article *Kant, Liberal Legacies, and Foreign Affairs*, he discusses the phenomenon often referred to as the "Democratic Peace Theory." This theory posits that democratic states are less likely to go to war with each other. Doyle links this idea to Immanuel Kant's philosophy, which argues that citizens of a nation, understanding the costs of war, are more likely to oppose it. This opposition stems from the fact that the costs of war are borne directly by the citizens of a nation. In democracies, where the government's legitimacy comes directly from its citizens, policies are more likely to reflect the will of the people, including a general reluctance to engage in war. Additionally, the transparency and legal constraints inherent in democratic systems raise the

threshold for engaging in military action. Furthermore, democratic nations often emphasize economic cooperation and development. Economic interdependence makes conflicts more costly and less likely, as they can hinder economic progress. (Doyle, 1983)

By these criteria, China highly fits the standards of a threat to Taiwan, with its overall strength and military capability far exceeding Taiwan's, geographical proximity, and open declaration of Taiwan as part of China, not ruling out the use of force for reunification, showing high aggressive intentions. Under alliance politics theory, Taiwan would naturally seek to ally with the U.S. to balance the threat from China. Moreover, Taiwan and the U.S. share democratic values, which under the framework of democratic peace theory, suggests a higher degree of mutual trust. The U.S. has historically provided Taiwan with economic and military aid, making it likely for Taiwan to desire an alliance with the U.S. The U.S., viewing China as a potential adversary, is inclined to seek alliances to counterbalance China's influence, thus making a U.S.-Taiwan alliance reasonable.

Robert Gilpin, in his book *War and Change in World Politics*, argues that history is a series of states of hegemonic rise, expansion, and decline. When a single hegemon dominates the international system, it uses its power to maintain international rules and stability, benefiting from the stability. However, when the power of the hegemon declines, it may lead to other

powerful states challenging its hegemonic status, causing international disorder and conflict. The key to this phenomenon lies in the challenger assessing the benefits of challenging the hegemon as outweighing the costs. (Gilpin, 2012)

John Mearsheimer, in *The Tragedy of Great Power Politics*, explains the reasons for striving and challenging hegemonic status. In an anarchic international society, states seek power and status to consolidate their security, with the ultimate goal of achieving hegemony. Even if major powers do not wish for conflict, in the inability to ascertain other states' intentions and capabilities, states are still trapped in a competition for power. (Mearsheimer, 2014) In his 2021 article in *Foreign Affairs*, *The Inevitable Rivalry: America, China, and the Tragedy of Great-Power Politics*, Mearsheimer clearly states that as China grows stronger, it will inevitably seek power on the international stage for its security, and the most powerful U.S. will unavoidably become China's target. (Mearsheimer, 2021)

Based on these theories, as a regional power, China will strive to challenge the U.S.'s hegemonic status to gain security and other benefits, leading to international instability and disorder until a new hegemonic system is re-established. While Mearsheimer emphasizes the security dilemma of states as an intrinsic motive for power pursuit, his argument downplays the role of international alliances and ideologies. If alliances and ideologies can develop

good trust between states, the pursuit of power and arms races due to mistrust might not occur. However, in current U.S.-China relations, as mutual trust has not been established, the competitive relationship between the two is likely to continue.

In Alexander Wendt's *Social Theory of International Politics*, he posits that the anarchic state of international relations is not a fixed, inherently hostile condition, but rather one constructed through states' interactions. He emphasizes that national interests are also constructed in these interactions, negating the notion of inherent national interests. This perspective opens up broader possibilities for international relations, making them more complex and less predictable. For instance, if the United States aims to maintain global stability for its benefit, allying with other democratic nations could be conducive to this goal. However, applying this to Taiwan's case, the U.S. avoids direct conflict with China and hence does not endorse Taiwan's democratic pursuit of independence or form a formal alliance with Taiwan, which operates a democratic government. This demonstrates that international relations evolve based on a confluence of strategic factors and interests, making it challenging to accurately predict outcomes with a singular theoretical approach. (Wendt, 2014)

In the 2017 Congressional Research Service report *Taiwan: Issues for Congress*, Susan V. Lawrence, a specialist in Asian Affairs at the

Congressional Research Service, noted that Taiwan, a democratic island with a population of 23 million, has faced increased pressure from China since Tsai Ing-wen was elected president in 2016. (Lawrence and Morrison, 2017) In her 2023 report *Taiwan: Political and Security Issues*, she highlighted that at the 20th National Congress of the Chinese Communist Party, Xi Jinping publicly declared that the unification with Taiwan is a necessary condition for the "great rejuvenation of the Chinese nation" and stated that China will never renounce the use of force against Taiwan. This stance on Taiwan is legally backed by the Anti-Secession Law passed by the People's Republic of China in March 2005. (Lawrence & Campbell, 2023)

Luke P. Bellocchi, Associate Professor of Practice at the Joint Forces Staff College, National Defense University, in his article *The Strategic Importance of Taiwan to the United States and Its Allies* published in *The US Army War College Quarterly*, mentioned four significant implications of Taiwan for the United States: its geopolitical importance, commercial value, being a beacon of democracy for China, and the loss of Taiwan potentially leading to a loss of confidence in the U.S. by its allies. Bellocchi believes Taiwan's geographic location is crucial for China as it can serve as a base to break through the First Island Chain and threaten the security and strategic material transport routes of surrounding U.S. allies. Moreover, as the world's 16th largest trading economy and producer of 90% of the world's most advanced semiconductors, China's acquisition of Taiwan could lead to significant economic and technological

advances, enhancing its competition with the U.S. He also points out that Taiwan's successful practice of democracy represents the potential for democratic systems in Chinese societies, countering China's view that Chinese societies must be governed by socialism, and presenting a viable political path for China's future. He also believes that the U.S.'s history of actively assisting Taiwan's defense and showing willingness and capability to intervene in the Taiwan Strait could be undermined if China eventually occupies Taiwan, shaking the credibility of U.S. security assurances to its allies. (Bellocchi, 2023)

In the comprehensive report *U.S.-Taiwan Relations in a New Era*, co-authored by former Principal Deputy Director of National Intelligence Susan M. Gordon and Admiral Michael G. Mullen, USN (ret.) and published by the Council on Foreign Relations, the authors extensively endorse Taiwan's strategic value to the U.S. based on geography, economy, and democratic ideology. They believe the U.S. should maintain the status quo in the Taiwan Strait and deter China's aggression against Taiwan, aiming to convince Chinese leaders that any aggressive actions against Taiwan would be unsuccessful. (Gordon and Mullen, 2023)

Economically, the authors note that the interdependent economic relationships between Western countries and China might not serve as leverage for economic sanctions to deter China. Conversely, China might perceive Western

countries as unable or unwilling to bear the losses of sanctioning China, thus strengthening its confidence in aggression toward Taiwan. The authors state that China has frequently used economic threats against Taiwan, such as suddenly announcing bans on Taiwanese agricultural and fishery product imports or restricting key production material exports to Taiwan, affecting Taiwanese public confidence in their government. They suggest establishing a fund for U.S. Asia-Pacific allies, including Taiwan, to mitigate the risk of Chinese economic threats. This fund would activate to maintain market stability when China imposes market or commodity entry trade threats against allies.

Regarding security in the Taiwan Strait, the authors believe that with China actively developing its military for regional conflicts, the U.S. should swiftly strengthen its strategic deterrence capabilities in East Asia, including enhancing C4ISR, electronic and cyber warfare capabilities, and reinforcing the deployment of missiles, submarines, and stealth bombers. Although the People's Liberation Army has made significant military advancements in the past 20 years, amphibious operations to invade Taiwan remain difficult and complex, compounded by Taiwan's geography unfavorable for landings, suggesting the PLA still lacks the full capability to invade Taiwan. Meanwhile, the U.S. military should assist the Taiwan military in training and establish joint operational interoperability, ensuring other regional allies like Japan and Australia are willing to provide assistance during conflicts in the Taiwan

Strait, such as offering bases for U.S. operations, imposing sanctions on China, or military intervention. The authors also note Taiwan's challenging geography, dependence on imports for energy, food, and medicine, and reliance on undersea cables for external communications. They suggest the U.S. should help Taiwan stockpile ammunition to avoid running out during modern warfare, as seen in the Ukraine-Russia conflict.

The authors also highlight internal issues in Taiwan's defense, such as the long-term purchase of expensive weapon systems hindering the development of asymmetric defense strategies. Given the vast military budget gap between China and Taiwan, Taiwan's military disadvantage is more apparent. Taiwan's military adopts a highly centralized command structure, risking paralysis of the command system if targeted by decapitation strikes. Additionally, Taiwan's voluntary conscription system is ineffective, and while Taiwan is improving its reserve training system to fill the manpower gap of conscription, the contribution of reserve soldiers to defense remains limited. In the event of a Chinese wartime economic blockade and damage to undersea cables, Taiwanese society could suffer severe impacts, affecting internal stability and the public's will to resist.

Ian Eason, an American scholar who has long studied China, published *The Chinese Invasion Threat: Taiwan's Defense and American Strategy in Asia* in 2017. The book discusses the potential strategies the People's Liberation Army

(PLA) might adopt in an attack on Taiwan, supported by extensive internal PLA documents. Eason points out that high-level PLA officer training has long focused on the recapture of Taiwan. Due to China's long-term strategic research and intelligence gathering on Taiwan, the PLA is well-informed about Taiwan's military deployment, topography, weaponry, and suitable amphibious landing sites. He also notes that, based on internal Chinese military documents, China is extremely cautious about the issue of attacking Taiwan and has devised numerous invasion plans with detailed risk assessments. These include capturing Taiwan's outlying islands, assessing the risks of military occupation and blockade of Taiwan, strategies for rapidly disabling Taiwan's defenses, and how the PLA would respond to intervention by the U.S. and Japan. (Easton, 2019)

The U.S. Department of Defense's 2022 *Military and Security Developments Involving the People's Republic of China* (as known as *China Military Power Report*) detailed the PLA's military development and deployment. China's military is the second largest in the world, with about 2.2 million active personnel and a 2021 defense budget of \$261 billion. The Chinese navy, the largest in the world with around 340 vessels, continues to produce aircraft carriers capable of long-range operations. China has also been strengthening its long-range missile capabilities, enhancing its anti-access and area denial capabilities in the Western Pacific and South China Sea, as well as its nuclear strike capabilities. The report mentions that in 2021, the PLA increased its

military exercises targeting Taiwan, totaling more than 20, a significant increase from 13 in 2020. The report also emphasizes that the PLA is actively planning joint-force invasion scenarios for Taiwan, incorporating traditional army, navy, and air force elements, as well as logistics support, electronic warfare, cyber warfare, and the integration of civilian transportation and repair capabilities. (Department of Defense, 2022) The China Aerospace Studies Institute, a unit of the Air University, in its October 2022 report *PLA Rocket Force Organization*, noted the rapid development of the PLA's Rocket Force, which increased by 10 missile brigades between 2017 and 2019, from 29 to 39 brigades, a growth of over 33%. (China Aerospace Studies Institute, 2022)

The *China Military Power Report* also compares Taiwan's military capabilities with China, showing a highly asymmetric situation. In the Eastern and Southern Theater Commands (directly usable for an attack on Taiwan), China has deployed 416,000 personnel, compared to Taiwan's 89,000. The disparity is even greater in naval capabilities, with the PLA Navy in these theaters having 59 medium and large surface combat vessels, including 1 aircraft carrier and 2 cruisers, compared to Taiwan's 26 vessels, including 22 frigates and 4 destroyers. China has 39 diesel-electric and nuclear submarines deployable in the Taiwan Strait, while Taiwan has only 2 diesel-electric submarines. In terms of air power, China has 700 fighters and 250 bombers in the Eastern and Southern Theaters capable of attacking Taiwan, compared to Taiwan's 300 fighters. However, it is noteworthy that a country's defensive

capabilities are not solely determined by the quantity of weapons, as evidenced by Ukraine's successful resistance against Russia in 2022. Additionally, short-range air defense and anti-ship missiles have asymmetric effects for the defender and are crucial in warfare.

Various scholars studying Chinese and Taiwanese military capabilities, in the book *Crossing the Strait: China's Military Prepares for War with Taiwan*, discuss the PLA's ability to invade Taiwan using different means. (National Defense University Press, 2022) Roderick Lee, in his article *The PLA Airborne Corps in a Taiwan Scenario*, discusses the People's Liberation Army Air Force's ability to conduct airborne landings in Taiwan. He notes that China currently lacks the transport capacity for large-scale airborne operations and that airborne capabilities may be used in conjunction with other branches for joint operations. The lack of training for actual airborne combat is also a major disadvantage for China's potential aerial invasion of Taiwan. (Lee, 2022)

Conor M. Kennedy, in his article *Getting There: Chinese Military and Civilian Sealift in a Cross-Strait Invasion*, analyzes the PLA's potential maritime invasion of Taiwan. He points out that the PLA's focus on building large oceangoing vessels has left a shortage of amphibious landing ships. Notably, the PLA actively seeks to incorporate civilian transport capabilities into its amphibious operations, such as the 2016 National Defense Transportation Law encouraging civilian enterprises to produce transportation tools compliant with

defense standards and the 2010 Defense Mobilization Law granting the PLA the power to requisition and modify civilian resources. As of 2019, China's commercial shipping fleet ranked third globally in total tonnage, and China has the largest number of registered maritime workers. (M. Kennedy, 2022)

Chieh Chung, in his article *PLA Logistics and Mobilization Capacity in a Taiwan Invasion*, addresses the PLA's logistical challenges in an invasion of Taiwan. He points out that the current state of the PLA's logistics is insufficient to support large-scale joint operations, with inadequate material reserves for high-intensity warfare and issues in material distribution, such as low frontline stock and distant rear supply nodes. The PLA's "quick victory" strategy in an invasion of Taiwan implies a massive influx of supplies and logistics operations in a short period, presenting significant challenges to the PLA's logistical system. Notably, China is also planning to integrate civilian resources into its logistics system and use militia forces to assist in tasks like production and mobilization. The "quick victory" strategy heavily relies on the efficient operation of the PLA's logistical system. (Chung, 2022)

Lyle Goldstein, a scholar long studying the PLA, in his article *The hard school of amphibious warfare: examining the lessons of the 20th century's major amphibious campaigns for contemporary Chinese strategy*, uses military journals and reports related to the PLA to show that the Chinese military actively studies historical amphibious battles to enhance its future strategy for

Taiwan. These studied campaigns include the Normandy landings, the airborne invasion of Crete, the Inchon landing during the Korean War, and the Falklands War. According to Goldstein, Chinese strategists are capable of drawing objective evaluations and lessons from these strategies. He cites the starkly different outcomes of the 1949 Battle of Kinmen (where the PLA suffered a defeat) and the successful 1955 Battle of Yijiangshan Island, stating that "the PLA's learning capability is impressive." However, he also notes that while Chinese strategists attempt to learn from various amphibious warfare lessons, complex military plans like amphibious operations often go awry, as seen in the Russia-Ukraine conflict. Well-equipped soldiers with a determination to defend can conduct asymmetric defense. Nonetheless, he reiterates that despite China not conducting any large-scale amphibious operations in the past fifty years, this does not mean China lacks the capability to successfully execute amphibious warfare. (Goldstein, 2023)

According to a public war game simulation conducted in January 2023 by the Center for Strategic and International Studies (CSIS), detailed in their report "The First Battle of the Next War: Wargaming a Chinese Invasion of Taiwan," if the U.S. and Japan fight alongside Taiwan against an invading PLA, China's plan to invade Taiwan would fail completely. The report also mentions that if the U.S. and Japan do not participate, Taiwan would eventually be defeated and completely controlled by China. However, even without U.S. and Japanese involvement, Taiwan's air defenses and anti-ship missiles would

significantly damage the Chinese military. The report suggests that even after landing, the PLA would be hindered by Taiwan's complex geography and unable to quickly take over Taiwan, requiring about 70 days to capture Taipei and gain full control of the island. (Cancian, Cancian and Heginbotham, 2023)

The 2023 Congressional Research Service report "Taiwan: Political and Security Issues" states that U.S.-Taiwan relations are mainly governed by the 1979 U.S. domestic law, the *Taiwan Relations Act* (TRA), influenced by the three U.S.-PRC joint communiqués signed in 1972, 1978, and 1982, as well as President Ronald Reagan's "Six Assurances" to Taiwan in 1982. The TRA does not require the U.S. to defend Taiwan actively but clearly specifies that the U.S. "will make available to Taiwan such defense articles and defense services in such quantity as may be necessary to enable Taiwan to maintain a sufficient self-defense capability." Although the U.S. follows a "one-China policy" and explicitly recognizes the People's Republic of China as the "sole legal government of China," it does not recognize Taiwan as part of China but rather "acknowledges" the Chinese position. Notably, U.S. arms sales to Taiwan, governed by the TRA, aim to ensure Taiwan's self-defense capability, focusing mainly on passive defense weapons with limited range. However, the strength and quantity of weapons sold to Taiwan depend on the risk assessment of a PLA attack on Taiwan and the urgency of strengthening Taiwan's self-defense capability. (Lawrence and Campbell, 2023)

Richard C. Bush, former AIT chairman and current director of the Center for Northeast Asian Policy Studies at the Brookings Institution, and Bonnie S. Glaser, managing director of the German Marshall Fund's Indo-Pacific program, in their April 2023 book *US-Taiwan relations: Will China's challenge lead to a crisis?* detail the evolution of U.S.-Taiwan bilateral relations during the Trump and Biden administrations since President Tsai Ing-wen's inauguration. For instance, the U.S. passed the *Taiwan Travel Act* in 2018, allowing mutual visits by officials at all levels between the U.S. and Taiwan. Alex N. Wong, Deputy Assistant Secretary for East Asia and the Pacific at the State Department, visited Taiwan four days after the act was signed, becoming the first high-ranking official to visit Taiwan under the act. This visit not only substantiated the act but also set a precedent for future high-level official visits. The U.S. also passed the *Taiwan Allies International Protection and Enhancement Initiative* in 2020, openly supporting and advising the executive branch to support Taiwan's participation in international organizations that do not require sovereignty as a condition of membership, using the Global Cooperation and Training Framework (GCTF) as a transnational platform for public affairs, allowing Taiwan to participate normally in international affairs. (Hass, Glaser and Bush, 2023)

The authors believe that while Trump's Taiwan policy was sometimes inconsistent, his administration continuously supported strengthening bilateral relations with Taiwan. For example, Secretary of State Mike Pompeo

announced the abolition of the guidelines for official contact with Taiwanese officials as Trump's administration was nearing its end. Under the original guidelines, Taiwanese diplomats were not allowed to enter Congress, so meetings between the two sides often took place informally, such as over meals. The abolition of these guidelines allowed the Biden administration to formulate new guidelines more favorable to bilateral interaction, including meetings at Taiwan's representative offices in the U.S. and "Twin Oaks," the former residence of Taiwanese ambassadors to the U.S.

The Trump administration also increased support for Taiwan on national security issues. For example, the U.S. Department of Defense published the *Indo-Pacific Strategy Report* in June 2019, emphasizing Taiwan's importance by mentioning it 31 times and referring to it as a democratic "nation" with which the U.S. must strengthen partnerships. The U.S. Army published a video on Facebook in June 2020 showing joint training between the U.S. and Taiwanese military. While such exchanges between the U.S. military and Taiwanese forces have been ongoing for years, they were not previously made public due to concerns about China's reaction. This public disclosure represents a trend towards more open and strengthened military cooperation between the U.S. and Taiwan. In terms of arms sales, the Trump administration sold 66 F-16V fighter jets to Taiwan in August 2019 and 135 SLAM-ER missiles and 11 HIMARS rocket systems in October 2020. As these weapons have the capability to strike mainland China, their classification as defensive

weapons has been controversial. This also indicates that whether arms sales to Taiwan strictly adhere to a "defensive" definition is not the primary consideration of U.S. arms sales policy to Taiwan, also demonstrating the U.S.'s confidence that the Taiwanese government would not provoke China.

After Biden took office, he largely continued Trump's Taiwan policy. At Biden's inauguration, the Biden administration invited Hsiao Bi-khim, Taiwan's representative to the U.S., marking the first time since the U.S. severed diplomatic ties with Taiwan in 1979 that a Taiwanese representative was invited to a presidential inauguration. On the eve of the 2022 World Health Assembly (WHA), Secretary of State Antony Blinken issued a statement expressing strong support for Taiwan's participation in the WHA and other international organizations that do not require sovereignty for membership, as well as "meaningful participation" in organizations where membership is not possible. In addition to continuing arms sales to Taiwan, President Biden has stated multiple times in media interviews that the U.S. military would assist in Taiwan's defense if China initiated an attack on Taiwan. Although his administration officials have reiterated after Biden's statements that the U.S. supports the one-China policy and has not committed to deploying troops to defend Taiwan, Biden seems to imply that the U.S. would not stand idly by if Taiwan were attacked. (Hass, Glaser and Bush, 2023)

In December 2022, the United States passed the *National Defense Authorization Act for Fiscal Year 2023* (NDAA), which stipulates that over the next five years, up to \$10 billion in grants could be provided to Taiwan under the Foreign Military Financing program. It also reaffirmed Taiwan's status as a major non-NATO ally, granting it priority access to military resources similar to NATO allies. Additionally, the U.S. President can utilize the "Presidential Drawdown Authority" under section 506(a)(1) of the Foreign Assistance Act (FAA) to allocate up to \$1 billion annually from U.S. defense inventories for free military assistance to Taiwan or other countries. U.S. Secretary of Defense Lloyd Austin stated in March 2023 to the Senate that the Pentagon is planning to quickly provide weapons to Taiwan under this provision, similar to U.S. military aid to Ukraine. (Harris, 2023) (White House, 2023) The House of Representatives also passed the Fiscal Year 2024 bill in June 2023, which supports joint training programs between the U.S. National Guard and the Taiwanese military and requests \$108 million for Taiwan to purchase urgent and high-priority defense articles and services, emphasizing Taiwan's priority in acquiring military equipment and services.

William Chih-Tung Chung, a researcher at the Institute for National Defense and Security Research, in his article *The U.S. 《 National Defense Authorization Act for Fiscal Year 2023 》 Actively Enhancing Defensive Military Capabilities of Taiwan*, notes that the passage of the NDAA represents significant progress in U.S.-Taiwan relations. The U.S. military has

moved from merely arms sales to military assistance, allowing Taiwan to enjoy priority in obtaining weapons, similar to traditional U.S. allies like Israel and the Philippines. However, he observes that U.S. assistance to Taiwan comes with conditions, requiring "Taiwan's defense spending to exceed the previous year's expenditure and its support for asymmetric strategies," before allocation. This indicates the U.S. intention to influence Taiwan's defense strategy, including increasing the military budget and constructing asymmetric forces recognized by the U.S. Furthermore, the NDAA requires the Department of Defense to submit an annual comprehensive assessment of U.S.-Taiwan military relations to Congress, including training, equipment, mobilization, asymmetric warfare concepts, and public perception of the military, signifying the U.S. intent to comprehensively build the Taiwanese military into an efficient and combat-capable force. Chung also points out that Taiwan's government and military need to consider how to accept U.S. assistance without provoking China to take more aggressive actions in the Taiwan Strait under the pretext of "foreign interference." (Chung, 2022b)

A 2022 Defense News article, *Taiwan is buying US weapons, but Washington isn't delivering them*, reveals that the U.S. has a backlog of about \$14 billion in arms sales to Taiwan. Republican Congressman Mike McCaul attributes this to government administrative negligence, insufficient supply chain and production capacity, and the crowding-out effect of the war in Ukraine. The article mentions that after Russia's invasion of Ukraine, the U.S. provided

Ukraine with Harpoon anti-ship missiles, Stinger anti-aircraft missiles, and High Mobility Artillery Rocket Systems originally intended for Taiwan. (Harris, 2022b) However, political scientists Jennifer Kavanagh and Jordan Cohen disagree with the notion that U.S. arms transfers to Ukraine have led to a shortage of weapons for Taiwan. In their January 2023 article in *War on the Rocks*, *The Real Reasons for Taiwan's Arms Backlog — and how to Help Fill it*, they mention that the weapons supplied to Ukraine were mainly surplus U.S. inventory, while those for Taiwan are mostly new and require different weapons. They believe the key factors are the inadequate capacity of the U.S. defense industry, unstable supply chains, and inefficiency in the arms sales process. (Kavanagh and Cohen, 2023)

Regarding issues with the U.S. defense supply chain for Taiwan, Raymond H.J. Huang, a researcher at the Institute for National Defense and Security Research, in his article *Observations on the Current Status of the U.S. DoD's (Tiger Team) Improvement Measures to Enhance Foreign Military Sales Process*, notes specific reform measures proposed by the U.S., including strengthening communication with allies and suggesting priority orders for required military equipment, reducing the difficulty of transferring critical technologies, encouraging investments to enhance defense capacity, and utilizing the Special Defense Acquisition Fund (SDAF) to quickly provide allies with priority weapons. It's noteworthy that allies' weapon requests are given priority or SDAF access only when the U.S. government confirms they

align with its security interests. This suggests the U.S. might seek consensus with Taiwan's military to purchase asymmetric weapons and construct a defense procurement list suitable for Taiwan. (Huang, 2023)

Recent U.S. defense policies have focused on interoperability with allied forces. A 2020 RAND report, *Chasing Multinational Interoperability: Benefits, Objectives, and Strategies*, states the benefits of U.S. military pursuing interoperability include utilizing allies' capabilities complementarily, increasing the legitimacy of overseas operations with allied involvement, avoiding mutual restraint by cultivating understanding with allies, deterring enemies through joint operations, fulfilling security commitments with allies, and sharing operational expenses. The U.S. also emphasizes interoperability with Taiwan, thus strengthening U.S.-Taiwan bilateral military contacts in recent years, such as increasing U.S. military personnel stationed in Taiwan to cultivate joint operational understanding. (Pernin et al., 2020)

Caitlin Talmadge, a professor at Georgetown University, in her 2022 paper *Then What? Assessing the Military Implications of Chinese Control of Taiwan* and her Foreign Affairs article *The Consequences of Conquest: Why Indo-Pacific Power Hinges on Taiwan*, mentions that as long as Taiwan is not controlled by China and the U.S. can control the narrow waterways leading to the Pacific north of the Philippines, Chinese submarines would almost certainly be detected and targeted by the U.S. Navy. (Green and Talmadge,

2022) However, if Taiwan is annexed by China, it could develop Taiwan into a submarine and underwater listening base, deploying a large number of hydrophones along its eastern coast to detect U.S. submarines. According to her calculations, 77% of the Philippine Sea would be exposed to Chinese detection, making it easier for the Chinese navy to implement regional denial against the U.S. Navy, and Chinese nuclear missile submarines could potentially threaten the U.S. mainland from the deep waters of the Pacific. (Green and Talmadge, 2022a)

Lonnie D. Henley, a senior fellow at the Foreign Policy Research Institute, in his 2023 CMSI China Maritime Report article *Beyond the First Battle: Overcoming a Protracted Blockade of Taiwan*, points out that aside from nuclear weapons, China's most effective threat to Taiwan is a blockade. With U.S. intervention, Taiwan might only have eastern ports for cargo transport, but the limited capacity and vulnerability of roads leading to these ports would restrict cargo volume. In the event of an indefinite Chinese blockade of Taiwan, Taiwan would suffer a catastrophic blow, and the global economy would be severely affected. The U.S. seems to have only two options: forcibly break the Chinese blockade of Taiwan or abandon Taiwan altogether. Henley believes the latter is politically unacceptable, so the U.S. should face reality and seriously prepare for direct conflict with China. (Henley, 2023)

The 2023 RAND report *Inflection Point: How to Reverse the Erosion of U.S.*

and Allied Military Power and Influence highlights that Taiwan lacks a sense of crisis regarding the prospect of war, resulting in military spending on weapons ill-suited for defending against a PLA attack. Taiwan urgently needs more land-based missiles and drones with communication and reconnaissance capabilities. The report also suggests that Taiwan should develop the independent tactical operational capabilities of its smaller, lower-level units to enhance their flexibility and survivability. Additionally, with Taiwan sharing intelligence with allies, it must establish robust policies and procedures to prevent the leakage of sensitive information to Chinese intelligence agents. (Ochmanek et al., 2023)

Strategist Drew Thompson, in his 2021 article *Winning the Fight Taiwan Cannot Afford to Lose*, argues that as the military gap between China and Taiwan widens, Taiwan should not continue to emulate the U.S. by purchasing expensive weapons (such as destroyers, fighter jets, and main battle tanks) and instead should develop an asymmetric defense strategy suitable for Taiwan. He also mentions the "Overall Defense Concept" (ODC) proposed by former Taiwanese Chief of Staff Lee Hsi-min in 2017. Under ODC, Taiwan's combat model is divided into three stages: 1) Force preservation, focusing on protecting units from the PLA's initial intense attacks; 2) Coastal battle, attempting to destroy PLA ships and landing crafts within about 100 kilometers of Taiwan's coast using anti-ship missiles and sea mines; 3) Eliminating the enemy at the landing beaches, continuing the use of sea mines

to slow down the enemy and employing land artillery and short-range missiles to target vessels and troops near the coast, with drones and HIMARS playing key roles. (Thompson, 2021)

However, Thompson notes that Taiwan's Ministry of Defense has not implemented the ODC concept. Although it emphasizes asymmetric warfare, it still invests in large surface ships, attack submarines, and fighter jets, whose survivability in the early stages of war is questionable, and their high costs crowd out funds for other asymmetric warfare weapons, such as small missile boats. He also mentions that the Chief of Staff who succeeded Lee Hsi-min, Huang Shu-kuang, dismissed ODC, leading to its discontinuation and unpopularity within the military. Despite the Ministry of Defense's continued support for asymmetric warfare, detailed guidance for its implementation is lacking. Although most mid-level officers support the ODC concept, they are reluctant to challenge the ideas of senior officers. (Thompson, 2021)

Independent scholar Tanner Greer, in his September 2019 Foreign Affairs article *Taiwan's Defense Strategy Doesn't Make Military Sense*, argues that Taiwan's limited defense budget should focus on small weapons capable of punching above their weight, such as missile patrol boats, minelayers, drones, and missiles. However, the Taiwanese government spends significant portions of its budget on M1A2T Abrams tanks and F-16 fighter jets and invests heavily in developing its own submarines. Greer believes Taiwan is engaged in

an unwinnable arms race with China, driven partly by political leaders who purchase high-profile weapons to demonstrate their commitment to resisting external threats and to showcase U.S. support, with political symbolism outweighing military significance. (Greer, 2019)

Michael A. Hunzeker, Associate Professor at George Mason University's Schar School of Policy and Government, in his February 2021 statement to The United States–China Economic and Security Review Commission, observes shortcomings in the Taiwanese military's training and management system. Conscripts spend more time on administrative tasks than actual training and lack combat-related training after discharge. Senior officers often micromanage subordinates, leaving lower-ranking officers with little decision-making authority and fear of punishment for failure. Due to these training and management deficiencies, public confidence in the military is low, and morale is not high, affecting the willingness of citizens to serve. (Hunzeker, 2021a)

Hunzeker points out that the failure to implement a strategy of purchasing large quantities of low-cost weapons for asymmetric warfare may be due to bureaucratic inertia and fundamental disagreements, such as the belief that relying solely on low-cost defensive weapons would leave Taiwan passive in war if the U.S. cannot intervene in a Taiwan Strait conflict. In his recommendations to Congress, he suggests that the U.S. should insist on conditional arms sales, applying the TRA's authorization to sell only

"defensive weapons" to asymmetric weapons envisioned by the U.S. He also suggests that the U.S. should make clear to Taiwan that U.S. military plans will be based on Taiwan implementing an asymmetric strategy, alleviating Taiwanese military concerns about developing asymmetric warfare capabilities.

In his War on the Rocks article *Taiwan's Defense Plans Are Going off the Rails*, Hunzeker bluntly states that fighter jets, tanks, and submarines are "ill-suited to wage an asymmetric defense of the island" and that these weapons will take too long to deliver, with Taiwan lacking the time to wait. He urges the U.S. government to actively intervene in Taiwan's arms procurement direction, not only because Taiwan has little time to prepare for war, but also to reduce the risk of U.S. involvement. (Hunzeker, 2021b)

Admiral (ret.) Lee Hsi-min, who proposed the ODC, in his November 2020 Diplomat article *Taiwan's Overall Defense Concept, Explained*, suggests that suitable asymmetric weapons should be "a large number of small, mobile, and lethal things," such as numerous drones, miniature missile assault boats that can hide in Taiwan's over 200 fishing ports, low-cost short-range precision-guided munitions, and sea mines. (Hsi-min and Lee, 2020) In his 2022 book *The Overall Defense Concept: An Asymmetric Approach to Taiwan's Defense*, published in Taiwan, he outlines the deficiencies in Taiwan's defense, including unclear military strategy, insufficient defense budget, transition from

scription to volunteer military service compounded by Taiwan's low birth rate leading to a lack of military personnel, and low public respect for soldiers affecting morale and willingness to enlist. He identifies several urgent issues, including the growing logistical and personnel costs of responding to frequent Chinese incursions into Taiwan's airspace and waters, and the lack of public awareness of the risk of war with China. (Hsi-min, 2022)

Taiwanese military scholar Holmes Liao, in his May 2023 National Defense magazine article *Taiwan's Intangible, Potentially Disastrous Defense Problems*, candidly criticizes the Taiwanese military, emphasizing the need to address three widespread issues: "unprofessionalism, defeatism, and Chinese nationalism." He notes the lack of professionalism and a focus on form over substance, such as training in outdated bayonet techniques and marching drills that do little to enhance combat capabilities. Despite the annual Han Kuang Exercise, senior officers rarely learn from it and make adjustments, and many large-scale live-fire exercises are scripted, offering little benefit in training commanders' real-time responses. (Liao, 2023)

Liao further observes that soldiers are often engaged in meaningless tasks like "cutting grass, painting buildings, and answering several roll calls," leading to a defeatist attitude. Those who strive for excellence are often suppressed. For instance, none of the West Point graduates in the Taiwanese military in recent decades have been promoted to officer ranks, opting instead for early

retirement. Another serious issue he highlights is the Taiwanese military's proximity to Chinese ideology. The Taiwanese army's lineage to the Kuomintang-established Whampoa Military Academy in Guangzhou and the relatively closed culture within the military lead to a higher proportion of personnel identifying as Chinese rather than Taiwanese, compared to the general public. This tendency has worsened due to the pro-independence Democratic Progressive Party's governance and the Chinese Communist Party's attempts to win over Taiwanese officers with Greater China ideology, leading to numerous espionage cases within the Taiwanese military. Liao believes these are severe national security issues requiring U.S. intervention to help correct various outdated practices within the Taiwanese military. (Liao, 2023)

The Taipei School of Economics and Political Science (TSE) published the *2022-2023 Republic of China Defense Assessment* report in June 2023, comprehensively examining the capabilities of the Republic of China (Taiwan) military and offering recommendations. The report emphasizes the importance of establishing a complete reserve force, stating that the combat effectiveness of the reserve force depends not on quantity but on whether it has undergone sufficient training. It suggests that an ideal reserve force should achieve regularized and localized training, similar to the U.S. National Guard. The report also examines Taiwan's "Indigenous Defense" policy, noting that Taiwan's defense industry must understand its limitations and leverage

government power to integrate into and access international supply chains. The U.S. House's FY24 NDAA draft explicitly states that "industrial cooperation" will be one method to support Taiwan in obtaining defense articles and services. Given the longstanding cooperation between Taiwan and the U.S. in high-tech industries such as semiconductors, Taiwan's defense industry has the potential to follow this model. With the opportunity for industrial cooperation provided by the U.S., Taiwan's defense industry can integrate into international supply chains and enhance its indigenous research and production capabilities. (Center of Peace and Security, 2023)

John Dotson, in his August 2023 report published by the Global Taiwan Institute titled *Chinese Information Operations against Taiwan: The 'Abandoned Chess Piece' and 'America Skepticism Theory,'* provides a detailed description of the America Skepticism Theory. He notes that this theory in Taiwanese society is a widely varied narrative framework, generally portraying Taiwan as a "chess piece" with no agency, subject to the whims of a powerful manipulator and capable of being abandoned at any time. The United States, in this narrative, is depicted as a deceitful, greedy, and unethical superpower willing to sacrifice allies for its own interests, suggesting that Taiwan could be easily abandoned by the U.S. if it ceases to provide sufficient benefits. The author argues that the purpose of this narrative is to persuade the Taiwanese public that the U.S. is selfish, unreliable, and ready to forsake Taiwan, hence, Taiwan should establish a more trustworthy relationship with

China. (Dotson, 2023)

The America Skepticism Theory is particularly popular in the political discourse of the pro-China Kuomintang (KMT) in Taiwan, often amplified by friendly media. For instance, well-known Taiwanese media personality and current KMT vice-presidential candidate Zhao Shaokang frequently expresses the view that Taiwan should not be a chess piece of the U.S., and KMT presidential candidate and New Taipei City Mayor Hou Youyi has publicly stated that Taiwan will not be a pawn of superpowers. The author believes that many of the images and propaganda promoting America Skepticism bear the hallmarks of editing by the Chinese propaganda system, aiming to influence the election outcomes of the pro-American Democratic Progressive Party (DPP). However, it is important to note that America Skepticism indeed holds a significant market and influence in Taiwan, as indicated by surveys from the Taiwan Public Opinion Center (TPOF). For example, in their March 2022 survey on internet discourse regarding the Russia-Ukraine war, around 26% of comments criticized the U.S. for not militarily defending Ukraine and Afghanistan, extrapolating that the U.S. would not defend Taiwan militarily. In another TPOF survey, about 40% of respondents believed that U.S. military support for Taiwan would eventually push the island towards war, (TPOF, 2023) and another survey showed that 46.5% of Taiwanese people do not believe the U.S. would send troops to defend Taiwan, higher than the 42.8% who do. (TPOF, 2023b)

The prevalence of America Skepticism has led Taiwan's Ministry of Foreign Affairs to actively refute its claims, labeling it as a consistent Chinese propaganda tactic. However, the frequent promotion of America Skepticism by opposition political figures indicates its significant market in Taiwan and its potential to influence the election outcomes in favor of the DPP. (Dotson, 2023a)

In summary, the report by Dotson outlines several key arguments of America Skepticism:

1. Using Taiwan to Contain China: This argument suggests that Taiwan is being used by the U.S. to hinder China's rise.
2. Relying on the U.S. for Independence: Aimed at pro-American and pro-independence DPP figures, this narrative portrays them as selfishly disrupting Taiwan's stable status quo in pursuit of independence, aligning with U.S. interests, which are not openly acknowledged.
3. Overpriced and Substandard U.S. Military Sales: A common focus of America Skepticism, this argument accuses the U.S. of selling outdated weapons at high prices and manipulating Taiwan-China tensions to increase arms sales.
4. U.S. Willingness to Sacrifice Taiwan: Based on historical instances of the U.S. abandoning allies, this argument posits that the U.S. would forsake Taiwan if it no longer serves American interests.

The author suggests that America Skepticism is a result of Chinese information warfare against Taiwan, designed to foster anti-American sentiment to promote unification with China. The theory is widely disseminated online, often packaged from a local Taiwanese perspective to gain credibility. However, Dotson also acknowledges that the U.S.'s complex diplomatic history could lead to fact-based criticisms of its alliances, and not all skepticism can be attributed to hostile Chinese propaganda.

Despite this analysis, the report does not list all the key reasons behind the formation of America Skepticism, such as the U.S.'s strategic ambiguity policy, which deters both Chinese military invasion and Taiwanese attempts at independence. Critics of the U.S. view this as manipulation through false promises for strategic and economic gains. As long as the U.S. maintains this policy, America Skepticism will likely continue to find a place in Taiwanese society.

In the 2006 article "Doubly Dualistic Dilemma: US Strategies towards China and Taiwan," published by Oxford University Press, Taiwanese political scientist Philip Yang discusses the Bush administration's initial increased support for Taiwan and strategic deterrence of China. However, post-9/11, U.S. policy shifted towards counterterrorism and strategic cooperation with China. Taiwan's then-president, Chen Shui-bian, announced his intention to

draft a new constitution for Taiwan through a public referendum to make Taiwan a "normal country." (Yang, 2006)

The U.S. reacted angrily to this move, as the new constitution implied a clear push for Taiwanese independence and was announced without prior consultation with the U.S. The State Department spokesperson unequivocally opposed any attempts to change Taiwan's status, including referendums designed for independence. Faced with Taiwan's move to alter the status quo, the U.S. responded with a strategically ambiguous dual-deterrence approach, promising not to support Taiwanese independence and restricting arms sales, but also indicating that it would not ignore a Chinese attack on Taiwan.

Notably, the Bush administration was the most supportive U.S. government of Taiwan since the early 1980s, yet openly opposed Chen Shui-bian's constitutional referendum, signifying that maintaining the status quo in Taiwan aligns with U.S. strategic interests.

Former AIT Chairman Richard C. Bush noted the delicate balance needed in executing the U.S.'s strategically ambiguous dual-deterrence strategy. It required avoiding alienation of Taiwan while maintaining credible deterrence against China, without showing excessive force that might lead China to perceive the U.S. as fundamentally antagonistic. The author believes that the U.S. needs to carefully manage this policy and mediate cross-strait policies when necessary to maintain peace in the Taiwan Strait. (Yang, 2006)

The limitation of this paper is its completion in 2006, under Chinese President Hu Jintao's low-profile international strategy, presenting China as peacefully rising. However, with Xi Jinping's ascension in 2012, his promotion of nationalism and reinforcement of authoritarianism under the slogan of the "great rejuvenation of the Chinese nation" have introduced aggressiveness and instability, affecting East Asian stability. Xi's domestic propaganda and hostile rhetoric towards the U.S. suggest he views the U.S. not as a cooperative partner but as a primary obstacle to China's goals. In this clearly antagonistic context, the U.S. might shift from a mediator to a defender of Taiwan. Additionally, with the end of the U.S.'s counterterrorism campaigns and China's military strengthening, the U.S. has started to rebuild its military deterrence against China, making the past strategy of avoiding excessive deterrence against China likely obsolete.

Army Aviation officer Kyle Amonson and Coast Guard officer Dane Egli, in their paper *The Ambitious Dragon: Beijing's Calculus for Invading Taiwan by 2030*, discuss the motivations behind China's potential aggression towards Taiwan and external factors influencing China's behavior. The authors note that Xi Jinping has anchored his regime's legitimacy in the great rejuvenation of the Chinese nation, with the reunification of Taiwan being a crucial element. Having consolidated power domestically, reclaiming Taiwan to fulfill this grand vision could be his primary strategic objective. The paper suggests

that if China fails to achieve peaceful unification with Taiwan by 2030, it may resort to military invasion around that time, for reasons including: (Amonson and Egli, 2023)

(1) Xi Jinping's Age:

At 70, and with China's average life expectancy at 78, Xi might feel a sense of urgency to secure his political legacy by reclaiming Taiwan soon, even if he remains in power and in good health by 2030.

(2) Societal Aging in China:

The authors highlight that China is among the countries with the fastest aging populations. By 2040, about 28% of its population will be over 60. This aging demographic could hinder China's development and heavily burden its healthcare system. The Communist Party has long derived its legitimacy from economic growth. Economic decline could lead to public dissent against the Party's rule. Hence, China might prefer to confront Taiwan before its demographic challenges become more pronounced.

Regarding external factors, based on learnings from the Ukraine-Russia conflict, the authors note:

(1) Ambiguity of Taiwan's International Status:

Taiwan's lack of formal sovereignty and cultural similarities with China might

lead the international community to perceive the Taiwan Strait conflict as an internal Chinese matter, reducing the impetus for intervention.

(2) Lack of a Reliable Regional Alliance:

Unlike Ukraine, which is a NATO non-member partner and bordered by NATO members, Taiwan has not signed military agreements or joined military organizations. This might mean Taiwan cannot immediately count on neighboring countries for assistance in a conflict.

(3) Geographical Constraints:

Taiwan, significantly smaller than Ukraine, offers a more straightforward invasion route for China. Additionally, Taiwan's lack of adjacency to allies like the United States could impede immediate military support in the event of a conflict.

In monarchic cultures, rulers often prioritize their political legacy and want their achievements to be continued by successors. With Xi abolishing the presidential term limit, his power resembles that of pre-modern Chinese monarchs. Thus, if Xi senses a real loss of power approaching, he might actively seek to establish a lasting political legacy, making the paper's point about his age particularly relevant.

IV. U.S.-Taiwan Strategic Partnership

a. Political Status of Taiwan

Taiwan, officially known as the Republic of China (ROC), is a democratic nation with a population of approximately 23 million. Located south of Japan and north of the Philippines, Taiwan had a Gross Domestic Product of \$761.691 billion USD in 2022, ranking 21st globally according to the International Monetary Fund. (International Monetary Fund, 2023) Taiwan transitioned from authoritarian rule to political liberalization post-1987 and conducted its first direct presidential election in 1996. In 2016, Tsai Ing-wen of the Democratic Progressive Party was elected president, marking the third peaceful transition of power. Tsai's administration has adopted a cautious foreign policy, strengthening relations with Western democracies while avoiding disputes with China.

Following the civil war in China, the ROC and the People's Republic of China (PRC) have governed Taiwan and mainland China, respectively. Legally, both claim to be the sole legitimate government of all of China, including each other's territory. Under Xi Jinping, China has increased its military presence near Taiwan and openly refuses to renounce the use of force for reunification. In response, Taiwan's government has positioned China as a potential adversary, declaring its readiness to defend Taiwan's democracy through military action. (Lawrence and Campbell, 2023)

b. U.S.-Taiwan Cooperation History

During World War II, China, ruled by the Kuomintang (KMT), was an ally of the United States. At that time, Taiwan was still under Japanese colonial rule. After Japan's surrender and the end of World War II, Taiwan was returned to China, ending Japan's 50-year rule over the island. After the war, the KMT government, led by Chiang Kai-shek and supported by the United States, suffered a series of strategic defeats in the ensuing civil war against the Communist Party of China. Eventually, in 1949, the KMT retreated to Taiwan, and the People's Republic of China (PRC), led by the Communist Party, was established. (Gordon and Mullen, 2023)

Initially, the Truman administration in the U.S. announced its non-intervention in China's civil war, owing to distrust of Chiang Kai-shek and a pessimistic view of the war situation. However, with the outbreak of the Korean War in June 1950 and to prevent the spread of communism, the U.S. dispatched the Seventh Fleet to defend Taiwan. After the Korean War, the First Taiwan Strait Crisis occurred between the Republic of China (ROC) and the PRC in September 1954. Considering the potential spread of communism, the United States and Taiwan signed the Sino-American Mutual Defense Treaty in December 1954, which took effect the following year, formally establishing a military alliance between the two.

The relationship between communist China and the Soviet Union deteriorated, leading to military clashes in 1969. The United States, seeking to exploit this opportunity to "play China against the Soviet Union," began reconciling with the PRC. This allowed the PRC to replace the ROC as China's representative in the United Nations following the passage of U.N. Resolution 2758 in 1971, leading to the ROC's expulsion from the U.N. Countries globally began to establish relations with the PRC. U.S. President Nixon's visit to China in 1972 symbolized the thawing of Sino-American relations. On January 1, 1979, the U.S. formally established diplomatic relations with the PRC, recognizing it as the sole legal government of China in the Joint Communiqué, and acknowledging the Chinese position that Taiwan is part of China. Consequently, the U.S. severed diplomatic ties with the ROC, and the Sino-American Mutual Defense Treaty ceased to be effective on January 1, 1980.

Despite the severance of diplomatic ties with Taiwan, the U.S. enacted the Taiwan Relations Act in 1979 to solidify its relationship with Taiwan. The Act explicitly stipulates that the U.S. will continue commercial and cultural exchanges with Taiwan and provide it with defensive arms. It expresses "grave concern" over any non-peaceful means to determine Taiwan's future. This Act remains in effect today and is the primary legal basis for U.S.-Taiwan interactions. Taiwan's political system gradually transitioned from authoritarianism to democratization, and the U.S. maintained close ties with Taiwanese political leaders throughout this period. Since Tsai Ing-wen's

administration took office in 2016, its strategic direction and foreign policy have gained the trust of the U.S., leading to increased levels of official visits and military exchanges. Taiwan has been explicitly defined by the U.S. as a "major non-NATO ally," demonstrating the close cooperative relationship between the two countries in recent years. (Gordon and Mullen, 2023)

c. Common Adversary of the U.S. and Taiwan: China

The People's Republic of China (PRC) was established in Beijing on October 1, 1949, as a one-party socialist regime. For the first 30 years of the PRC's existence, the United States and China were on opposite sides of the global divide between democracy and communism, with adversarial political and diplomatic relations. However, following the deterioration of Sino-Soviet relations, the two countries began to normalize their relations against a common opposition to the Soviet Union. The U.S. and China formally established diplomatic relations in 1979, leading to rapid development in their bilateral relations. However, the relationship suffered a significant setback after the 1989 Tiananmen Square incident, where China's forceful suppression of protesters led to U.S. arms embargoes and economic sanctions against China. Relations gradually improved over time but were marked by occasional conflicts and confrontations. (Council on Foreign Relations, 2023)

In October 2000, President Clinton signed the U.S.–China Relations Act of

2000, which established permanent normal trade relations between the two countries and directly facilitated China's accession to the World Trade Organization in 2001. China's economy subsequently grew rapidly, becoming the U.S.'s second-largest trading partner after Canada in 2006 and the world's second-largest economy in 2010.

Xi Jinping became China's President in 2012, advocating for the "great rejuvenation of the Chinese nation." He initiated military reforms, expanded armaments, implemented the Belt and Road Initiative across Asia, Africa, and Europe, and constructed artificial islands with military bases in the South China Sea. These large-scale projects often led to disputes and discontent among neighboring countries, contributing to regional tensions in East Asia.

Under President Trump's administration, U.S.-China relations rapidly deteriorated. Trump criticized China's economic policies of subsidizing domestic industries and accused China of intellectual property theft, imposing heavy tariffs on billions of dollars' worth of Chinese imports. China retaliated, leading to a bilateral trade war and subsequent diplomatic disputes. The COVID-19 pandemic's outbreak in the U.S. in 2020 further strained relations, with Trump blaming China for the spread of the virus and China accusing the U.S. of spreading misinformation. President Biden continued a hawkish policy towards China upon taking office, seeking to deter China militarily and block it in key technologies, such as increasing U.S. military presence in East Asia

and legislating bans on exporting advanced semiconductors to China. (Council on Foreign Relations, 2023)

The U.S. Strategic Framework for the Indo-Pacific under the Trump administration described China as a regional challenger aiming to establish "illiberal spheres of influence" and attempting to dismantle the U.S.' strategic alliances in the region. Biden's 2022 Indo-Pacific Strategy report clearly positions China as a challenger, engaging in unlawful and malicious practices to gain advantages in the region. (The White House, 2022) In a November 2023 meeting statement, Biden explicitly stated that the U.S. and China are in competition, emphasizing the desire to prevent competition from escalating into conflict or a new Cold War. (The White House, 2023)

According to offensive realism, a school of international realism, states in an anarchic international system tend to expand their power and hegemony to ensure their security when they cannot be certain of other states' intentions. In this context, China's claims over Taiwan and its military expansion, not ruling out force to reclaim Taiwan, could be seen as a means to extend its power to counterbalance the U.S., another hegemonic state. (Mearsheimer, 2021)

Similarly, the U.S. views China as its primary competitor, believing China seeks to hinder its rise and maintain its current hegemonic status. This mindset reflects regional disputes in East Asia, such as territorial conflicts over South

China Sea islands and Taiwan, and the struggle for control over sea and air power. This can be explained by the security dilemma, where states, due to mutual distrust, fall into an arms race and conflict. For instance, China's recent naval developments, while possibly intended for defense, could be interpreted by neighboring states as preparatory for aggression, prompting these states to expand their military capabilities or seek alliances to balance regional power, ultimately leading to regional instability and military conflict.

d. Importance of U.S.-Taiwan Strategic Relationship

i. Shared Threat Between the U.S. and Taiwan

According to the theory of alliance politics, nations form alliances in response to a common threat. In the case of Taiwan and the United States, even though there is no formal military alliance treaty between the two countries, both view China as a security threat, providing a basis for their cooperation against a mutual adversary. This collaboration is a strategic response to perceived threats and aligns with the principles of balance of power theory. (Walt, 2007)

Under this theory, states form alliances to counter potential dominant powers, thereby maintaining regional stability. Taiwan, due to its limited territorial size and resources, cannot independently withstand China's influence and power. Hence, it seeks to align with the United States. Moreover, the U.S. extends its strategy of balancing power in East Asia by forming alliances with other countries in the region, such as Japan, the Philippines, South Korea, and

developing relations with Vietnam and India. (The White House, 2022) These alliances and relationships help the U.S. to counterbalance China's influence in the region, not only militarily but also politically and economically.

ii. Taiwan's Geostategic Importance

(1) Core of the First Island Chain

Historically, the U.S. used the first island chain to prevent the spread of communism, especially from China. Located at the heart of this chain and close to key U.S. allies Japan and the Philippines, Taiwan's control by China would pose a direct threat to these countries and U.S. military personnel and assets stationed there, e.g., through short-range missiles and electronic warfare. Taiwan's strategic value extends beyond the island to the surrounding waters, where the Chinese navy could potentially cut off Japan and the Philippines, disrupting U.S. and allied strategic deployments during wartime. Furthermore, with a base in Taiwan, the Chinese navy could spread its operations to the central Pacific, increasing the threat to the U.S. mainland. (Bellocchi, 2023)

(2) Control over Critical Trade Routes

Most strategic resources, like oil and natural gas, for U.S. allies in Northeast Asia such as Japan and South Korea are transported through the Strait of Malacca, passing near Taiwan. Chinese control over Taiwan could allow for the blockade of these surrounding waters, forcing detours and significantly

increasing the cost and time for importing strategic materials. In the event of war, Japan and South Korea could face immediate supply challenges, affecting their domestic stability and military capabilities. (Gordon and Mullen, 2023)

(3) Major Semiconductor Production Hub

Semiconductors, crucial for almost all advanced weapons and equipment, are strategic global commodities. About 70% of the world's chips, and 90% of the most advanced ones, were produced in Taiwan as of 2022. (Hille, 2021) If Taiwan falls under Chinese control, the U.S. and its allies might face difficulties in securing chips for economic production, severely impacting the production of various technological products like planes, cars, and IT industries. China could gain access to advanced semiconductor R&D technologies by controlling Taiwan's semiconductor facilities, narrowing the technological gap with the U.S.

iii. Taiwan as a Successful Case of Democratic Transformation in East Asia

Taiwan's transition from a post-World War II authoritarian regime to a democracy where citizens have the right to elect their president is a significant success story. Having undergone multiple peaceful transitions of power between political parties, Taiwan has demonstrated the stability of its democratic system. According to the ideology theory concept, countries with similar ideologies are likely to form alliances. Furthermore, from the

perspective of the democratic peace theory, democracies are less likely to engage in wars with each other. This is because democratic decision-making processes cater to the people's needs, and the majority typically opposes war. Additionally, the transparency in decision-making in democratic countries reduces mistrust and misinterpretation of intentions among nations, fostering diplomatic trust.

Taiwan's stable democracy implies a likelihood of earning trust in U.S. foreign policy. The United States can reasonably expect Taiwan to act in ways that do not harm U.S. interests. Furthermore, as one of the few successful examples of democratic transition in East Asia, the U.S. might hope to see Taiwan's experience spread throughout the region. This spread could increase the number of potential allies in the area and decrease the likelihood of regional conflicts. Significantly, Taiwan shares ethnic and cultural structures with China. Therefore, Taiwan's successful democratic transition could potentially be replicated in China. If China were to democratize along the lines of Taiwan's experience, it could lead to a reduction in the potential for military conflict in East Asia. China might then adopt the democratic norm of resolving disputes through diplomacy and dialogue rather than military means, aligning well with U.S. interests in maintaining regional stability and development. (Gordon and Mullen, 2023)

iv. The Adverse Impacts of the United States Abandoning Taiwan

The U.S. and its allies form the first island chain as a strategic deterrent against China. According to deterrence theory, the deterring state must demonstrate sufficient military strength and willingness to convince a competitor that any aggressive actions would result in retaliatory attacks, costing more than any potential gains, thereby dissuading the competitor from initiating conflict. However, if the U.S. were to abandon its military cooperation with Taiwan due to increased Chinese military pressure, it could be interpreted by China, a competitor, as a lack of U.S. military strength and resolve to enforce deterrence, potentially increasing China's willingness to attack Taiwan and neighboring countries.

Additionally, according to hegemonic stability theory, the stability of the international system depends on a dominant hegemonic state that maintains order through its military and economic power. The decline of this hegemony could lead to instability in the international system. As a military and economic powerhouse, the U.S. currently holds this hegemonic position. If the U.S. were to yield to China's challenges and abandon Taiwan, it could signal the decline of U.S. hegemony, encouraging competitors to challenge U.S. authority.

Such scenarios could not only endanger the U.S.'s hegemonic status but also potentially fracture alliances led by the U.S. If the U.S. abandons Taiwan for practical reasons, other countries may perceive the U.S. as unable or unwilling

to defend itself and its allies, leading them to establish relationships with competitors to avoid attack in the absence of U.S. assistance. This development could severely weaken the cohesion within the alliance and provide competitors with opportunities to interfere in alliance affairs through friendly alliance members, significantly reducing the effectiveness of alliance politics. To prevent this, the U.S. should actively assist in defending Taiwan to stabilize ally confidence and maintain the credibility of its deterrence strategy.

V. Taiwan's Overall Security Situation

a. Taiwan Armed Forces Overview

Taiwan aims to establish a small but capable voluntary military force. However, funding and personnel shortfalls are concerns, as evidenced by the gap between its established military positions of 215,000 and actual recruitment numbers of 169,000 as of 2021, mainly due to inadequate compensation. To address defense issues, Taiwan has extended compulsory military service from four months to a year and continuously increased its defense budget. The military budget for 2023 is \$19 billion, a 13.9% increase from 2022, accounting for 2.4% of Taiwan's GDP. (U.S. Department of Defense, 2023)

According to the 2022 China Military Power Report, the Taiwanese army comprises approximately 89,000 ground combat personnel, including 3 corps, mechanized and motorized infantry brigades, armor brigades, army aviation assault brigades, artillery brigades, marine brigades, 850 tanks, and 1200 artillery pieces. The navy includes Kee Lung-class destroyers, corvettes, landing ships, submarines, patrol and coast guard ships. The air force consists of over 300 fighters, training aircraft, transport aircraft, and special mission aircraft, including indigenous F-CK-1, F-16s (with additional units to be delivered post-2025), and Mirage 2000 fighters. (Department of Defense, 2022).

Taiwan's defense strategy, centered on countering a potential Chinese invasion, emphasizes asymmetric defense capabilities and survivability. Given China's superior military strength, Taiwan focuses on withstanding an initial assault and retaliating effectively, deploying area denial tactics. The strategy also aims to extend key defensive zones offshore, increasing tactical flexibility and developing joint military capabilities across branches, including missiles, C4ISR, and drones. Taiwan has prioritized indigenous missile development, capable of producing various types of missiles including the Yun Feng with a 2,000 kilometers range for preemptive strikes against Chinese missile bases. (CSIS, 2021) Missile production numbers are confidential, but there's been a significant increase in recent years to counter Chinese military threats. The annual missile production reportedly rose from 200 in 2018 to approximately 500. (Ministry of National Defense, 2022)

Wargaming scenarios by the Center for Strategic and International Studies in January 2023 and the Sasakawa Peace Foundation in February 2023 demonstrate Taiwan's capability to inflict substantial losses on invading Chinese forces, even if ultimately overwhelmed. (Cancian, Cancian and Heginbotham, 2023) These simulations indicate Taiwan's ability to endure and inflict damage in a conflict scenario, highlighting the challenging nature of any potential Chinese invasion due to Taiwan's defensive infrastructure, complex geography, and urban landscapes. (Miki, 2023)

b. China's Military Overview

The People's Liberation Army (PLA) of China is the world's largest military organization, composed of about 2.185 million active military personnel, 1.17 million reservists, and 660,000 paramilitary personnel, totaling approximately 4 million in force strength. The PLA encompasses six branches: the Army, Navy, Air Force, Rocket Force (responsible for missile operations), Joint Logistic Support Force (handling logistics and supplies), and Strategic Support Force (overseeing electronic warfare, cyber warfare, and psychological operations). In 2023, China's defense budget was set at 1.5537 trillion yuan, a 7% increase from 1.4504 trillion yuan in 2022, constituting about 1.28% of China's GDP. However, the lack of transparency in China's defense spending suggests that the actual military expenditure could be significantly higher than the official figures. (U.S. Department of Defense, 2023)

According to China's 2019 Defense White Paper – *China's National Defense in the New Era*, the PLA emphasizes the modernization of equipment and training, focusing on the indigenous development and manufacturing of military equipment. In terms of tactical application, the PLA prioritizes the development of joint operations among different branches and precision strike capabilities to gain an advantage in modern warfare. (State Council Information Office, 2019) Regarding Taiwan, Beijing continues to use gray-zone tactics to enhance military deterrence and real-combat training capabilities. For instance, in 2022, the PLA deployed 1,737 aircraft into

Taiwan's Air Defense Identification Zone, a 79% increase from 972 aircraft in 2021. The PLA also continuously strengthens its military presence around Taiwan, actively planning and rehearsing tactics for an assault on Taiwan, with an emphasis on developing area denial capabilities to prevent Taiwan's allies from intervening in a conflict. (U.S. Department of Defense, 2023)

According to data from the U.S. Department of Defense's *China Military Power Report*, China's active ground combat personnel total approximately 1.05 million, with 13 army corps and weaponry including about 4,200 tanks, 7,600 artillery pieces, and 1,900 fighter aircraft. The navy boasts 2 aircraft carriers, 3 amphibious assault ships, 8 cruisers, 47 attack submarines, 6 nuclear-powered attack submarines, and 6 nuclear-powered ballistic missile submarines. In the Taiwan Strait region (Eastern and Southern Theaters), there are about 420,000 combat personnel, 5 army corps, and weaponry including 1,100 tanks, 2,300 artillery pieces, 750 fighter aircraft, 1 aircraft carrier, 3 amphibious assault ships, 4 cruisers, 31 attack submarines, 2 nuclear-powered attack submarines, and 6 nuclear-powered ballistic missile submarines. The PLA Rocket Force possesses a diverse range of missiles, including 350 intercontinental ballistic missiles with a range exceeding 5,500 km, 500 intermediate-range ballistic missiles, 1,000 medium-range ballistic missiles, and 1,000 short-range ballistic missiles. (Department of Defense, 2022)

c. Challenges of Taiwan's Military

In addition to the significant disparity in military spending between Taiwan and China, internal problems within Taiwan's military are also a key factor in the rapid imbalance of military power across the Taiwan Strait. The strategic community in the United States frequently voices opinions on the need for reforms in Taiwan's military. Despite ongoing reforms under President Tsai Ing-wen's administration, the Taiwanese military still faces several unresolved issues:

(1) Poor Internal Management and Image

Since the Second Taiwan Strait Crisis in 1958, Taiwan and China have not engaged in major armed conflicts. Due to its international status, Taiwan's military cannot train or engage in activities with international allies. The only significant public exposure of the military is during natural disasters, assisting in cleanup efforts. The lack of a stage to demonstrate military strength, coupled with negative news about internal management and training, has led to growing public skepticism about Taiwan's military capabilities.

In 2013, the death of a conscript due to improper military discipline led to massive public protests and demands for military reform in Taiwan. (Chang, 2013) To avoid similar incidents, the military shifted to assigning unrelated labor tasks to conscripts. According to a Wall Street Journal report in October 2021, a conscript mentioned that his four-month training mainly involved menial tasks like cleaning, carrying items, and weeding, with shooting training being the only useful part. (Wang and Gale, 2021)

Even long-term volunteer soldiers face issues with internal management. Common complaints include poor food and living conditions and excessive time spent on equipment maintenance and cleaning. The training model, focused more on formality than practical combat drills, has also been criticized. For instance, in late 2021, Taiwanese legislators questioned the Ministry of National Defense about prioritizing bayonet training over live-fire exercises. (Liberty Times, 2021) The annual military exercises, often scripted, also raise doubts about the military's ability to respond in real combat situations. (Liao, 2023).

(2) Insufficient Personnel and Service Duration

Before 2018, Taiwan had a conscription system, requiring all physically and mentally fit males aged 19 to serve in the military. Prior to 2000, the service duration was generally two years, gradually reduced to one year by 2008. From 2018, eligible Taiwanese males only have a four-month military training obligation, after which they become military reservists. Taiwan's military is now composed of volunteers who receive military salaries.

However, post-transition to a volunteer system, Taiwan's military faces a severe recruitment shortfall. In a 2023 budget review report, the Taiwanese Parliament highlighted two issues: 1. Some units were staffed at less than 80% capacity, indicating ineffective recruitment; 2. In the past five years, about

20% of recruited soldiers left before completing the minimum four-year service, opting to pay a penalty. (Ministry of National Defense, 2023) Paul Huang, a researcher at the Taiwanese Public Opinion Foundation, wrote in *Foreign Policy* in February 2020 that Taiwan's military should have 188,000 full-time personnel but only had 153,000, a nearly 20% shortfall. Frontline combat units like armored and artillery brigades were staffed at only 60% - 80% of required levels. (Huang, 2020)

CNN reported in December 2022 that Taiwan, facing declining birth rates, might soon surpass South Korea as the country with the world's lowest fertility rate, exacerbating the military's recruitment challenges. In addition to the demographic challenge, the military's poor internal management and image, as well as employment difficulties faced by veterans, hinder recruitment. (Cheung, 2022) To address the personnel shortage, the U.S. suggested reinstating the one-year conscription system, which President Tsai announced in late 2022 to be implemented from 2024. (Li, 2022) Moreover, the NDAA 2023 requires the U.S. Department of Defense to submit a comprehensive report on Taiwan's military capabilities, including the extent of the personnel shortage and efforts to resolve these issues.

(3) Limited Defense Budget

According to data from the Stockholm International Peace Research Institute, Taiwan's defense budget in 2022 was \$12.5 billion USD, ranking 21st in the

world. (SIPRI, 2022) However, its potential adversary, China, had a defense budget of about \$292 billion USD in 2022, at least 23 times larger than Taiwan's. China has consistently been the second largest military spender in the world, following the United States. Faced with China's massive defense spending, Taiwan is under pressure to increase its own defense budget. In 2017, Taiwan's President Tsai Ing-wen and James Moriarty, the Chairman of the American Institute in Taiwan, met in Hawaii, where President Tsai agreed to increase Taiwan's defense budget by 2% annually. (Office of the President, 2017) If there are additional military procurement needs, they would be addressed through separate budget allocations. Taiwan has already allocated two special budgets in 2020 and 2022, amounting to 250 billion Taiwanese dollars for 66 F-16V fighter jets (Central News Agency, 2019) and 240 billion Taiwanese dollars for domestically produced weapons like anti-ship missiles and drones. (Central News Agency, 2021)

Defense spending varies between countries due to differing economic conditions, but a country's commitment to defense can be gauged by the proportion of GDP allocated to military spending. For example, in 2022, Taiwan's military budget was 1.61% of its GDP, while other small and medium-sized countries facing external threats, such as Israel (4.51%), South Korea (2.72%), and Poland (2.39%), allocated a higher percentage of their GDP to defense. (SIPRI, 2022) This suggests that there is room for Taiwan to increase its defense budget. Notably, in the NDAA 2023, Taiwan's annual

increase in defense budget is a prerequisite for receiving Foreign Military Finance (FMF) grant assistance from the US, indicating that under US pressure, Taiwan's defense spending is expected to increase year by year.

(4) Divergent National Identities

Taiwan's military, particularly the army, has long faced issues of national identity. Following the Chinese Civil War, many mainland-born army personnel retreated to Taiwan with the Kuomintang (KMT), which emphasized the goal of reconquering the mainland. The Taiwanese army continues to symbolize its founding military school established by the KMT in Guangdong, China. This has led many military personnel, especially retired senior officers, to emotionally identify with the Republic of China as including the entire Chinese mainland. However, the current ruling party in Taiwan, the Democratic Progressive Party (DPP), leans towards Taiwanese independence, directly challenging the national identity ideologies of some military officers, leading to their dissatisfaction. (Su, 2005)

After the DPP government cut military pensions in 2018, retired military officers felt undervalued, exacerbating tensions with the ruling party. (DW, 2018) The Chinese Communist Party (CCP) has capitalized on this by criticizing the DPP and glorifying the Taiwanese army's historical contributions in China, thereby courting Taiwanese retired officers. The CCP's warm approach and offers of banquets and travel hospitality have persuaded

some retired officers to cooperate with China and provide military intelligence. (UDN, 2023) These retired officers also use their military networks to develop collaborators within the active military, leading to frequent espionage cases in the Taiwanese military. (CNA, 2023)

As the politicization of national identity is a potent tool for Taiwanese politicians in major elections and often effective, this issue is unlikely to be resolved soon. However, under the threat of the CCP, if national identity remains unclear, the morale and loyalty of the military could be tested. Ensuring that national identity does not impact military combat effectiveness is a critical issue for both the Taiwanese and US governments to consider deeply.

(5) Intelligence System Dysfunction

Taiwan has seen a surge in Chinese spy cases within its military in recent years. Previously, espionage cases in Taiwan were often initiated by retired military officers who used their personal networks and senior-junior relationships to gather intelligence for China. (Lee and Lague, 2021) As retired officers are civilians, they typically receive lighter sentences for espionage compared to active military personnel. However, recent espionage cases have involved active military personnel, raising concerns about the efficacy of Taiwan's intelligence system. (Reuters, 2023) A notable case involved Taiwanese Army Major General Luo Hsien-che, who managed army

communications and served as a military intelligence officer. Despite receiving annual excellence awards and being stationed in the US for four years, Luo became a Chinese spy in 2001 while in Thailand. He provided critical intelligence to the People's Liberation Army, including data on the US-sold Link-16 command and control system. (Higgins, 2023) Taiwan's Control Yuan revealed that the Taiwanese military was unaware of Luo's espionage until the FBI informed them. (Control Yuan, 2018) (RFI, 2014)

A major turning point for Taiwan's intelligence operations was the Third Taiwan Strait Crisis in 1999. To deter Taiwan from holding its first direct presidential election, China conducted large-scale live-fire military exercises along its southeastern coast. At that time, PLA Major General Liu Liankun was turned by Taiwanese intelligence and provided crucial information about the exercises. However, Taiwan's President Lee Teng-hui publicly stated that the missiles China fired did not have warheads, alerting the CCP. China subsequently investigated and executed all involved. (VOA, 2014) The CCP's enhanced counterintelligence efforts led Taiwan's military intelligence units to prohibit intelligence personnel from operating in China, a policy that has continued for nearly 20 years. Meanwhile, China has continuously sent spies and cultivated collaborators within Taiwan. According to a 2017 statement by an official from Taiwan's National Security Bureau, there are about 5,000 CCP spies in Taiwan. (Liberty Times, 2022)

The secretive culture of Taiwan's intelligence units, which not only keeps current operations confidential but also prosecutes retired officers who write about their experiences, has made it difficult for the intelligence community to reform. Taiwanese strategic scholar Holmes Liao has emphasized the urgency of rebuilding Taiwan's intelligence agencies. (Liao, 2023) Following the US installation of intelligence listening posts on Taiwan's west coast, which led to the discovery of some Chinese spies, the US must further assist Taiwan in developing intelligence and counterintelligence capabilities against China. Given the current US-Taiwan interoperability and intelligence sharing, the US is keen to prevent its sensitive intelligence from falling into the hands of spies within Taiwan. Therefore, establishing Taiwan's counterintelligence capabilities should be a top priority, with the US providing guidance and advice based on its extensive experience in intelligence development.

VI. The Security Policy and Defense Strategy of the United States

Towards Taiwan

a. Arms Sales to Taiwan

Since the signing of the *Taiwan Relations Act* in 1979, the United States has been obligated to provide Taiwan with the necessary defensive materials and technical services to maintain a sufficient self-defense capability. Following the establishment of diplomatic relations between China and the United States, the Reagan administration's Six Assurances also emphasized that arms sales to Taiwan would not be influenced by China and would have no end date. Successive U.S. administrations have continued arms sales to Taiwan based on these documents. (Lawrence and Campbell, 2023) These laws are crucial for Taiwan's defense, as Taiwan's attempts to purchase weapons from other countries are not legally protected and are thus susceptible to deliberate interference from China. Therefore, the U.S. has become Taiwan's only stable source of weapons.

The primary purpose of U.S. arms sales to Taiwan is to enhance its defense capabilities, and thus the U.S. tends not to sell weapons that could be used to attack mainland China. For the U.S., a conflict between Taiwan and China could increase the risk of U.S. military involvement, so a stable situation in the Taiwan Strait generally aligns more with U.S. interests. Selling offensive weapons to Taiwan could not only anger

China, prompting retaliatory actions, but also potentially lead Taiwan to directly attack China in a cross-strait military conflict, escalating the situation into a full-scale war. This could force the U.S. into the conflict and limit its options for resolution, significantly increasing the opportunity cost of military intervention.

However, the U.S. has sold weapons to the current Tsai Ing-wen administration that could be used to attack mainland China, such as F-16 C/D fighters and HIMARS missiles with a range of 300 kilometers. (Defense Security Cooperation Agency, n.d.) This may be due to multiple considerations: (1) The U.S. trusts the Tsai administration and subsequent governments to not recklessly use U.S.-sold weapons to attack China; (2) Taiwan is capable of mass-producing missiles, including the Yun Feng missile with a range covering Beijing, so U.S. sales of weapons capable of reaching China would not change the strategic situation; (3) Some weapons, like the HIMARS missile, fit the U.S. definition of "asymmetric warfare," so there may be a tendency to set aside disputes over whether they are offensive weapons.

In recent years, Taiwan's purchases of U.S. weapons, including F-16 fighters, Stinger missiles, Harpoon Block II surface-launched missiles, and high-mobility artillery rocket systems, have faced delivery delays, totaling \$14 billion. (Harris, 2022) Reasons include domestic production

capacity constraints, poor integration of supply chains, and the crowding-out effect of massive arms assistance to Ukraine. The U.S. government takes this issue seriously and has directed the Pentagon to establish two Tiger teams to address the delays in arms deliveries to Taiwan.

Additionally, the National Defense Authorization Act for Fiscal Year 2023 (NDAA), passed in December 2022, reaffirmed Taiwan's status as a major non-NATO ally, elevating Taiwan's priority level in military resource acquisition to that of NATO allies. Furthermore, the Biden administration used The Presidential Drawdown Authority (PDA) in late July 2023 to provide Taiwan with \$345 million in military aid. This assistance will transfer existing U.S. military stock to immediately enhance Taiwan's defensive capabilities and offset the security risks of delayed weapons delivery. (Lin and Wu, 2023)

b. Military Deterrence in Waters Around Taiwan

The United States has long maintained a military deterrence force in the waters surrounding Taiwan. The U.S. Seventh Fleet, assigned to the Western Pacific, has been a primary source of this deterrence.

Historically, the fleet has been deployed to the Taiwan Strait during times of heightened tensions between China and Taiwan. For instance, during the Korean War, President Eisenhower assigned the fleet to defend the Taiwan Strait, deterring the People's Liberation Army (PLA) from attacking Taiwan across the strait. After the U.S. severed diplomatic ties

with Taiwan, President Lee Teng-hui's visit to the U.S. in 1995 caused strong displeasure in China and led to missile tests, escalating tensions across the Strait.

In response to Taiwan's first direct presidential election in 1996, which China vehemently opposed, the PLA amassed troops along China's southeastern coast and conducted large-scale live-fire land, sea, and air exercises. Considering the possibility that these exercises could turn into real combat operations, Taiwan and the U.S. were on high alert. To prevent further escalation, the U.S. deployed the Independence carrier battle group and the Nimitz carrier battle group to the East China Sea and the Taiwan Strait in March 1996, deterring potential PLA actions against Taiwan.

When U.S. House Speaker Nancy Pelosi visited Taiwan in August 2022, China expressed strong displeasure and the PLA began four days of live-fire military exercises around Taiwan from August 2, 2022. These exercises, involving the Chinese Air Force, Navy, and Rocket Force, included missile firings in waters around Taiwan. In response, U.S. Secretary of Defense Lloyd Austin ordered the aircraft carrier USS Ronald Reagan to stand by near Taiwan, and two guided-missile cruisers, the USS Antietam and the USS Chancellorsville, passed through the Taiwan Strait in late August.

U.S. naval vessels frequently operate in the waters around Taiwan. According to the South China Morning Post, between 2007 and April 2019, U.S. naval ships transited the Taiwan Strait 92 times. (Power, 2019) These frequent exercises by U.S. naval forces near Taiwan demonstrate a commitment to defend the Taiwan Strait region and deter China. Additionally, these activities yield other benefits, such as boosting confidence among regional allies, providing real-world military training in potential conflict zones, and collecting intelligence on the geography and real-time military activities of the PLA for strategic and tactical considerations.

Since the defense treaty between Taiwan and the U.S. (later annulled due to diplomatic severance), China has not undertaken large-scale military aggression against Taiwan. Ely Ratner, the Assistant Secretary of Defense for Indo-Pacific Security Affairs, testified at a House Armed Services Committee hearing on September 19, 2023, that the U.S. deterrence in the Taiwan Strait is strong and effective. He emphasized that the U.S. military would continue efforts to maintain deterrence against Chinese aggression towards Taiwan. (Ratner, 2023) However, maintaining effective deterrence against China is a critical challenge. For example, the U.S. has only one air force base within operational range of Taiwan, Kadena Air Base in Okinawa, compared to China's 39 bases. China's vast

missile arsenal not only covers U.S. naval and air bases around China but also reaches as far as the U.S. base in Guam, 3,000 kilometers away. Ensuring effective deterrence remains a significant challenge for the U.S. military. (Mastro, 2023)

c. Strategic Clarity and Strategic Ambiguity

After the establishment of diplomatic relations between the United States and the People's Republic of China in 1979, and the signing of the Three Joint Communiqués, which recognized the People's Republic of China as the sole legal government of China, the U.S. lost the rationale to defend the sovereignty of the Republic of China (Taiwan). However, the Taiwan Relations Act, enacted in 1979, stated that any non-peaceful attempts to change the status of Taiwan would be of “grave concern” to the U.S. Due to the ambiguity of this term and the lack of clarity about what means the U.S. would use to express concern or intervene militarily in the event of a cross-strait military conflict, this strategy was categorized as “constructive ambiguity.” Under this strategy, the U.S. could deter both China and Taiwan: China could not be certain of U.S. military intervention, deterring it from forcibly reclaiming Taiwan; Taiwan, unsure of U.S. defense in the event of cross-strait conflict, would hesitate to declare independence, avoiding conflict with the U.S. policy of not supporting Taiwan's independence. Thus, this strategy became a long-term approach of the U.S. towards Taiwan. (Yang, 2006)

After Xi Jinping became China's president, China began extensive grey-zone operations in the waters and airspaces of neighboring countries like Japan, Taiwan, and the Philippines, and displayed a tough stance in diplomatic arenas. International political and diplomatic scholars started worrying that strategic ambiguity, with its unclear military intervention conditions, would embolden China to challenge U.S. red lines in grey areas, thereby eroding U.S. deterrence. In September 2020, Richard Haass, president of the Council on Foreign Relations, and researcher David Sacks, in their article *American Support for Taiwan Must Be Unambiguous* in *Foreign Affairs*, argued that if the U.S. continues its policy of strategic ambiguity, China might misjudge and take more aggressive actions against Taiwan, suggesting that the U.S. should shift to a policy of strategic clarity. (Haass and Sacks, 2020)

This article sparked widespread discussion among political scholars in Washington, D.C. Notably, Bonnie S. Glaser, the director of the Asia Program at the German Marshall Fund of the United States and a long-term Taiwan researcher, opposed strategic clarity. (Glaser et al., 2020) She believed that while Taiwanese people outwardly prefer the status quo, they harbor aspirations for independence. If the U.S. adopted strategic clarity, it might lead Taiwanese to believe the U.S. would unconditionally protect Taiwan, emboldening them to seek independence

and putting the U.S. in a difficult position. Additionally, she noted that China's military power has significantly increased, and the U.S. has not yet established strong enough deterrence in East Asia. Adopting strategic clarity might signal China that resolving the Taiwan issue would inevitably involve conflict with the U.S., possibly prompting China to abandon peaceful unification options and attack Taiwan prematurely. Moreover, if the U.S. defines clear red lines for strategic clarity, it would minimize the risk for China to engage in grey-zone invasions, allowing China to act more aggressively in grey areas without fearing U.S. military intervention. (Georgetown University, 2020)

President Biden has made statements suggesting strategic clarity, indicating that the U.S. would defend Taiwan against a Chinese military invasion. However, his administration has subsequently clarified that there is no official commitment to militarily defend Taiwan. This seemingly contradictory behavior could be a diplomatic tactic by the U.S. to maintain strategic ambiguity while warning China of the consequences of rash military actions, indicating that strategic ambiguity still aligns with U.S. strategic interests. From Taiwan's perspective, U.S. strategic ambiguity might lead to the belief that even if Taiwan faces Chinese invasion without seeking independence, the U.S. might not respond actively, and without a clear definition of intervention, the U.S. might not intervene militarily. If U.S. military deterrence in East Asia weakens, this

perception could spread and negatively impact U.S.-Taiwan relations.

d. Promoting Asymmetric Defense

It's a clear fact that China's military power far exceeds that of Taiwan, which necessitates Taiwan to develop an asymmetric defense strategy to increase the risk of China's potential invasion and deter its plans to attack Taiwan. According to Michael A. Hunzeker, Associate Professor at George Mason University's Schar School of Policy and Government, in his statement to The United States–China Economic and Security Review Commission on February 18, 2021, asymmetric weapons should be abundant and low-cost, mainly used to enhance anti-access and area denial capabilities for confined area defense. Missiles, land/naval mines, anti-tank weapons, and drones are generally considered asymmetric weapons. (Hunzeker, 2021a) (Sylvia, 2022)

Many in the U.S. political, military, and academic circles believe that Taiwan lacks a clear defense strategy, especially a definition for asymmetric weapons. Taiwan's current model of purchasing expensive, large conventional weapons quickly drains its limited defense budget. These costly weapons become primary targets in wartime and are likely to be destroyed in the first wave of PLA attacks given their vast arsenal of precision-guided missiles. For example, former Chief of the General Staff of the Taiwanese military, Lee Hsi-min, promoted the Overall Defense

Concept (ODC) during his tenure, shifting from purchasing large weapons to acquiring numerous smaller, survivable ones. However, after his retirement, the defense policy shifted due to internal political factors within the military, and the ODC was no longer mentioned. Taiwan's military still emphasizes asymmetric strategy but has not detailed its implementation and continues to purchase expensive weapons like F-16s and M1A2 tanks, raising concerns from the U.S. about Taiwan's commitment to an asymmetric defense model. (Hsi-min, 2022)

Following Russia's invasion of Ukraine, the Biden administration began actively urging Taiwan to develop an asymmetric strategy. According to a press release by the US-Taiwan Business Council on May 17, 2022, Deputy Assistant Secretary Mira Resnick of the U.S. Department of State stated to council members on March 14, 2022, that the Biden administration no longer supports “arms sales programs for Taiwan outside their definition of ‘asymmetric’ defense.” This led to the cancellation of three previously approved but later deemed non-asymmetric arms sales to Taiwan: MH-60R anti-submarine helicopters, E-2D airborne early warning aircraft, and M109 self-propelled howitzers. This move raised concerns about the US-Taiwan Business Council's ability to influence Taiwan's defense policy, especially under the condition of U.S. strategic ambiguity. (The US-Taiwan Business Council, 2022)

The National Defense Authorization Act for Fiscal Year 2023, signed into law by President Biden, clearly expresses the U.S. Congress's support for Taiwan's asymmetric defense, emphasizing capabilities that support an asymmetric strategy and cooperating with Taiwan to improve its ability to employ military capabilities in asymmetric ways, as described in the *Taiwan Relations Act*. This demonstrates the U.S.'s clear intention to support Taiwan's asymmetric strategy, including in arms sales and weapon co-production. Since the U.S. is Taiwan's primary source of weapons and security provider, Taiwan is likely left with few options other than following U.S. advice. However, decisions involving weapon selection often lead to disputes within Taiwan, involving questions about the effectiveness of the weapons and skepticism about the U.S.'s intentions in selling them, sometimes even affecting public confidence in the government. Taiwan's ability to implement reforms according to U.S. advice will rely on continuous cooperation and crisis management capabilities between the U.S. and Taiwan.

e. Providing Military Assistance to Taiwan

In the context of Taiwan's defense budget being insufficient to counter China, U.S. military aid can significantly bolster Taiwan's defense capabilities. The National Defense Authorization Act for Fiscal Year 2023, signed by President Biden, stipulates the provision of \$2 billion in

annual grant military aid to Taiwan from 2023 to 2027, with the president authorized to supply up to \$1 billion in defense articles from the existing U.S. Department of Defense inventory to Taiwan each year. Notably, the NDAA 2023 mandates that the utilization of the annual \$2 billion military aid is contingent on Taiwan incrementally increasing its defense budget and supporting an asymmetric strategy, subject to consultation between The United States Secretary of State and the Secretary of Defense and their testimony before Congress. This shows the U.S.'s influence on Taiwan's defense policy to align it more with U.S. strategic needs.

President Biden, on July 28, 2023, announced the use of the Presidential Drawdown Authority (PDA) to provide Taiwan with \$345 million worth of equipment. Notably, equipment provided under the PDA comes directly from U.S. Department of Defense inventory, thus bypassing production time and quickly enhancing the combat capabilities of Taiwan's military. For example, the aid includes MQ-9A drones; although Taiwan's military contracted for four MQ-9B drones in May 2023, the expected delivery date is 2025. (Dotson, 2023) With additional time needed for personnel training and other setup, the actual operational time may be later than 2025. Hence, the MQ-9A drones provided by the U.S. will effectively bridge this capability gap for Taiwan's military.

The NDAA 2023 also mandates the establishment of a "Regional

Contingency Stockpile" in Taiwan. The U.S. plans to use part of the \$2 billion aid, capped at \$100 million, to create a stockpile of weapons and ammunition for Taiwan. Considering that China might attempt to blockade Taiwan in the event of an invasion, Taiwan's island geography could make resupplying weapons and ammunition difficult, unlike Ukraine, which continuously receives supplies via rail, road, and other means from allies. Therefore, pre-establishing a regional ammunition stockpile for wartime is crucial for Taiwan's resilience during conflict. However, the location and maintenance of the stockpile are major challenges, given that there is no formal alliance between Taiwan and the U.S., no U.S. military facilities leased in Taiwan, and no official U.S. troops stationed there.

U.S. military aid to Taiwan, besides directly enhancing combat capabilities, may achieve other objectives:

- (1) **Enhancing Interoperability with Taiwan's Military:** Interoperability is the ability of different military forces to operate under the same weapon or command system. Since U.S. aid comprises active U.S. military equipment, familiarity with these weapons will improve joint operation capabilities between Taiwan's and U.S. forces
- (2) **Strengthening Taiwan's Asymmetric Warfare Capabilities:** Weapons provided by the U.S. inherently align with the definition of asymmetric warfare. Since Taiwan is not funding these acquisitions,

it avoids internal disagreements over military spending and rapidly arms its military with asymmetric capabilities.

- (3) Demonstrating the U.S.'s Commitment to Peace in the Indo-Pacific: Military aid to Taiwan signals U.S. commitment in the Indo-Pacific region, boosting confidence among potential allies and increasing their likelihood of aligning with the U.S.
- (4) Enhancing Deterrence against China: U.S. military aid to Taiwan signals to China that Taiwan is a strategic partner in the Indo-Pacific region. The U.S.'s proactive provision of military equipment during peacetime implies that its response to a Chinese invasion of Taiwan could escalate, potentially including direct military intervention by U.S. forces.

f. Cultivating Interoperability of Taiwan's Military

With China's formidable military presence in East Asia, including the world's largest navy and an extensive arsenal of short, medium, and long-range missiles and nuclear warheads, the U.S. would face logistical and firepower challenges in confronting China alone in East Asia, given the limited U.S. troop presence in the region and the distance from the U.S. mainland. Therefore, conducting "joint operations" with allies to counter China in East Asia is a rational military strategy. The NDAA 2023 repeatedly emphasizes building "interoperability" between U.S. and Taiwanese forces. According to NATO's definition, interoperability

means the ability of allies to effectively execute tactics together. (NATO, 2023)

Enhancing interoperability requires extensive drills, and in recent years, the U.S. has significantly increased the frequency of joint exercises with Taiwan. As reported by The Japan News in September 2023, the U.S. sends 2,000 to 3,000 military personnel annually to Taiwan for short-term training, and the U.S. military plans to train a Taiwanese army battalion at a U.S. military base. (Mukai and Correspondents, 2023) Nikkei Asia reported in January 2023 that the U.S. National Guard began training Taiwanese forces in early 2022. (Nakamura, 2023) Since National Guard members are not active-duty soldiers, this approach is less likely to provoke China into hostile actions against Taiwan and the U.S. under the pretext of direct U.S. military interference in China's internal affairs.

Besides enhancing military training, the U.S. military is also inviting Taiwanese forces to participate in joint exercises. For instance, the NDAA 2023 supports the U.S. Navy's invitation for Taiwan to participate in the "Rim of the Pacific Exercise," and the U.S. Army plans to invite a Taiwanese army battalion to participate in the Northern Strike joint combat exercise in the U.S. (Fu S. Mei, 2023) Through joint real-world training with allies, Taiwan's military will have the opportunity to learn allied tactics and command patterns, further enhancing collaboration

efficiency with allies. Additionally, the U.S. will assist Taiwan in acquiring the Link-22 data link system currently used by NATO. With this system, Taiwan can engage in reliable, real-time data transmission with allies, significantly enhancing its capability for joint operations. (Yu and Lin, 2023)

Although the U.S. has made enhancing interoperability with Indo-Pacific allies a key strategic goal, building rapport between allies requires overcoming initial cultural and language barriers and a military exchange platform that frequently provides collaboration opportunities. While NATO forces, under a common military command system, develop a degree of interoperability through regular training, Indo-Pacific countries lack a common defense organization, making it difficult to establish a foundational framework for joint exercises and cultivate interoperability. How to increase the frequency of exercises among regional allies without excessively provoking China, leading to retaliation against participating countries, requires continued efforts from the U.S. and its allies.

g. U.S. Strategic Deployment Around Taiwan

The U.S. military bases deployed around the First Island Chain serve as mediums for projecting U.S. military power in East Asia and are the main force for deterring strategic adversaries. On the First Island Chain in East Asia, due to the absence of formal diplomatic and alliance relationships

between the U.S. and Taiwan, the U.S. cannot station troops in Taiwan. However, the U.S. has bases in Japan, South Korea, and the Philippines. (Quincy Institute for Responsible Statecraft, 2023) In the event of a military conflict in the Taiwan region, the U.S. forces stationed there can quickly intervene to execute counter-access and area denial missions and support the Taiwanese military, thereby buying time for the mobilization of larger U.S. forces to East Asia. In peacetime, these stationed forces also conduct joint military training with regional allies, enhancing interoperability and coordination for joint operations.

In February 2023, the U.S. reached an agreement with the Philippines to use four of its military bases. According to The Washington Post, the Biden administration aims to establish at least two new bases on Luzon Island in the Philippines, to act swiftly in the event of a conflict in Taiwan. (DeYoung and Tan, 2023) Geographically, Luzon Island is adjacent to Taiwan and the Bashi Channel, a key passage for PLA submarines to break through the First Island Chain. In the event of a conflict in the Taiwan Strait, with U.S. and Japanese forces likely to tightly blockade Taiwan's northern coast, the Bashi Channel would become a primary entry point for the PLA Navy into the Pacific. Establishing U.S. military bases and intelligence gathering facilities there would not only facilitate blockading the Chinese fleet from entering the Pacific but also enable monitoring of PLA fleet movements, thus exerting

strategic deterrence.

It is noteworthy that U.S. bases in Japan, South Korea, and the Philippines are directly threatened by China's Dongfeng series missiles, and even the U.S. base in Guam is within the range of the Dongfeng-26 missile. (Department of Defense, 2022) Enhancing defenses against long-range precision-guided weapons at overseas bases is a major issue for U.S. forces in the Indo-Pacific region, apart from logistics and costs. As reported by The Wall Street Journal in August 2023, the U.S. military is adopting a strategy of small units and multiple bases, requiring rapid capture of forward bases and deployment of asymmetric weapons like anti-ship missiles. This strategy emphasizes mobility and concealment to reduce the risk of concentrated attacks by enemy long-range precision-guided weapons causing significant damage. (Cherney, 2023)

The New York Times in March 2023 reported an extreme training scenario of the U.S. Marine Corps with China as the hypothetical enemy: To avoid detection, they minimize the use of electronic devices, including radios, leading to long periods without receiving instructions and necessitating the development of independent operational capabilities. They move in small units across island chains and must develop local resupply capabilities, including desalinating seawater or hunting wildlife. Simultaneously, they employ high-tech methods like drones, infrared, and

network sensors for missions, a significant departure from conventional Marine Corps training. (Ismay, 2023)

It's important to note that the U.S. military's operational concept in East Asia has adopted asymmetric strategies. Due to the PLA's deployment of a large number of missiles, any collective or large-scale military assets are potentially exposed to PLA missile strikes. Considering the distance between the U.S. and East Asia, reinforcements and resupply are more challenging compared to China. If bases or overseas units are concentratedly attacked by the PLA, there's a risk of being besieged and annihilated before reinforcements can arrive. Considering the time and cost of establishing overseas operational units, and since the U.S. has not experienced large-scale military casualties since the Vietnam War, substantial losses in a short period might lead to U.S. public opinion favoring withdrawal from competition with China in East Asia, reminiscent of the Vietnam War.

To effectively utilize this new stealth and mobility-focused tactic, the U.S. might need to establish numerous small bases on allied territories, possibly using helicopters to help a small tactical unit establish temporary bases. However, base resupply becomes crucial after personnel deployment, so the U.S. might focus on developing interoperability in supply chains with Indo-Pacific allies. Local allies can use fishing or

civilian vessels as cover to resupply small U.S. forces, offering more agility than U.S. supply ships departing from Guam or Hawaii. However, advanced U.S. tactics may face challenges in joint operations with Indo-Pacific allies, mainly due to discrepancies in military personnel training. Due to the prevalent emphasis on hierarchy in Asian military culture, new tactics and training methods are not easily communicated from junior to senior officers. Personnel accustomed to top-down command models might struggle to achieve the “tactical independence” emphasized in new tactics.

VII. Challenges in U.S. Security Policy Toward Taiwan

a. Changes in the U.S. Political Environment

The evolving political environment in the U.S. could lead to different policy decisions. For instance, former President Trump, dissatisfied with NATO members' contributions and advocating an "America First" policy, believed the U.S. was not benefiting sufficiently from NATO and repeatedly threatened to withdraw. (Barnes and Cooper, 2019) Similarly, his administration halted a \$400 million military aid package to Ukraine, originally approved by the Obama administration, based on its policy considerations and interest calculations. (Karoun Demirjian et al., 2019) This indicates that if an administration's set ideas about national development do not align with existing security policies toward Taiwan, they might cease implementation, challenging the bilateral partnership.

b. Increased Chinese Military Power

China's growing military power in the Asia-Pacific region could negatively impact U.S. policy toward Taiwan. From the U.S. perspective, if it determines that it cannot successfully deter China militarily, it might question the effectiveness of developing a partnership with Taiwan and providing military assistance, affecting its willingness to continue such policies. Moreover, if the U.S. is unsure of winning a war against China, it might consider the risks and costs, avoiding military conflict with China over Taiwan and leading to a policy distancing from Taiwan. The

U.S. might also fear escalating a military conflict with nuclear-armed China into a nuclear war. If the U.S. believes the PLA is capable of launching nuclear weapons onto U.S. territory, it might abandon its security policy toward Taiwan to avoid risks.

From Taiwan's perspective, if the Taiwanese public perceives China's military strength as overwhelming and believes that even with U.S. assistance, Taiwan cannot win a war against China, public opinion might influence the government to adopt a strategy of non-confrontation with China. In such a scenario, the government might avoid policies that provoke China, making it difficult to sustain a U.S.-Taiwan partnership centered on resisting Chinese influence.

c. Economic Dependence on China

(1) United States

The U.S. has a strong economic foundation with China. In 2023, bilateral trade reached \$5.3 trillion, accounting for 13% of U.S. foreign trade. (Bureau of Industry and Security, 2023) China is also a major holder of U.S. debt, owning \$805.4 billion as of August 2023, making it the world's second-largest holder. (U.S. Department of the Treasury, 2023) The vast Chinese market is an important medium for profits for American companies, and bilateral trade is complementary. For instance, the U.S. exports

high-value-added products like technology equipment, aircraft, and financial services, while China specializes in producing lower value-added goods like clothing, household appliances, and electronic components. The developed manufacturing industry in China, with significantly lower production costs, leads many American companies to outsource production to China, creating high interdependence in supply chains. If China decides to retaliate against U.S. policies towards Taiwan, it could impose tariffs or import restrictions on U.S. trade goods and economically target American companies with significant interests in China, affecting their performance and development. China could also sell off U.S. Treasury bonds, causing significant fluctuations in U.S. financial markets.

(2) Taiwan

China is Taiwan's largest export market, with China and Hong Kong accounting for about 40% of Taiwan's exports and about 30% of its trade volume in 2022. (Executive Yuan, 2023)

Taiwanese companies also rely heavily on Chinese supply chains; for instance, much of Taiwan's tech industry assembly work is done in China. China could use economic coercion to demand Taiwanese companies operating in China to oppose Taiwanese independence and import agricultural and fishery products. China often targets industries and regions in Taiwan that support the

Democratic Progressive Party (DPP), attempting to damage the party's image and support.

d. Ethnic Identity in Taiwan

Taiwanese people have divergent views on political identity. While most identify as Taiwanese, a portion consider themselves Chinese. This group largely consists of military dependents and their descendants who retreated to Taiwan with the Nationalist government in 1949. According to a September 2023 poll by the Taiwan Public Opinion Foundation (TPOF), 76.7% of people in Taiwan identify as Taiwanese, but 9.2% identify as Chinese, and 8.1% see themselves as both Chinese and Taiwanese. Those identifying as Chinese generally prefer the government to adopt a friendly policy towards China and elect a China-friendly government. However, with the current U.S.-China divide and Taiwan's close partnership with the U.S., Taiwan is likely to be perceived as hostile by China. Consequently, these individuals might resist a partnership with the U.S., opposing policies that cooperate with the U.S. to ensure the Taiwanese government can maintain amicable relations with China. (TPOF, 2023d)

e. U.S. Skepticism in Taiwan

Long-standing skepticism within Taiwan questions the U.S.'s commitment to Taiwan's security, with some believing that the U.S. will

not bear significant costs for Taiwan's defense. This skepticism is rooted in the belief that the U.S. seeks benefits from security promises to Taiwan, such as economic gains from arms sales and using Taiwan to counter China's rise, but will not intervene militarily if Taiwan is invaded. Skeptics argue that in the event of a cross-Strait conflict, Taiwan would inevitably be annexed by China due to a lack of military support, and thus the only way to avoid annexation is to maintain good relations with China. Policies that may anger China, such as U.S. arms sales and military aid to Taiwan, are often questioned or opposed by these skeptics. According to a January 2023 survey by the Taiwan Public Opinion Foundation (TPOF), 38.1% of Taiwanese believe U.S. military aid would push Taiwan towards war, (TPOF, 2023) and 28.4% are unwelcoming of U.S. military aid. (TPOF, 2023a) A February poll showed 46.5% of Taiwanese do not believe the U.S. would send troops to defend Taiwan, exceeding the 42.8% who do believe. (TPOF, 2023b)

The skepticism mainly arises from:

(1) U.S. Strategic Ambiguity

The U.S. pursues a strategy of not formally committing to military intervention in the Taiwan Strait and does not clearly define its bottom line. Skeptics perceive this as the U.S. deceiving Taiwan with false promises, ready to abandon Taiwan at any time, leading to distrust in the U.S.'s commitment to defending Taiwan.

(2) U.S. Historical Abandonment of Asian Allies

The U.S. has historically abandoned the following Asian allies:

1. Republic of China

During World War II, the ROC led by Chiang Kai-shek was not recognized by the U.S. Truman administration, leading to a halt in military aid and indirectly contributing to the ROC's defeat in the civil war. After retreating to Taiwan, the U.S. initially intended to abandon Taiwan and declared non-involvement in the Chinese Civil War on January 5, 1950. However, the outbreak of the Korean War six months later prompted the U.S. to take immediate measures to contain communist expansion, providing security guarantees to Taiwan. (Gordon and Mullen, 2023)

2. South Vietnam

After the outbreak of the Vietnam War, the U.S. expanded military support to South Vietnam and formally deployed ground troops in March 1965. Following the Tet Offensive by North Vietnam in 1968 and subsequent domestic anti-war sentiment and political turmoil from the Watergate scandal, U.S. aid to South Vietnam declined. With consecutive military

defeats, the U.S. eventually withdrew on April 29-30, 1975, leading to South Vietnam's surrender on April 30. (Spector, 2018)

3. Afghanistan

Following the 9/11 attacks, the U.S. and NATO allies invaded Afghanistan on October 7, 2001, to capture Osama bin Laden. After defeating the Taliban, the U.S. established the pro-American Islamic Republic of Afghanistan in 2004. However, after bin Laden's death on May 2, 2011, Afghanistan lost its strategic significance as an anti-terrorism base. The U.S. government, unwilling to continue funding the Afghan War, began withdrawing troops on August 14, 2021, leading to the Taliban's capture of Kabul on August 15. (Biden, 2021)

These cases of U.S. abandonment lead skeptics to believe that U.S. support for allies depends solely on its interests, and the U.S. might abandon allies if defending them does not align with U.S. interests. Since skeptics think a war with China does not serve U.S. interests, they believe the U.S. would abandon Taiwan.

(3) U.S. Selling Obsolete Weapons to Taiwan

The U.S. often refuses to sell weapons desired by the Taiwanese

military or agrees to sell weapons that are not the top choice. (Hsi-min, 2022) Skeptics thus believe the U.S. coerces Taiwan into purchasing outdated or obsolete military products. However, they often overlook that U.S. arms sales aim to ensure Taiwan's self-defense capabilities. The *Taiwan Relations Act* only authorizes defensive weapons sales, and selling Taiwan offensive weapons that could reach mainland China might provoke the Chinese government and increase the likelihood of Taiwan provoking China. (Tiezzi, 2014) Additionally, shaping Taiwan's defense strategy, such as pushing for U.S.-approved asymmetric defense, might also be a reason for the U.S. controlling sales items. (The US-Taiwan Business Council, 2022)

It's worth noting that skeptics, while distrusting the U.S., do not necessarily emotionally support or identify with China, nor do they necessarily dislike the U.S. They hope to resolve the threat of Chinese military aggression by showing goodwill. In Taiwan, opposition politicians and media critical of the ruling party often promote skeptical viewpoints, which can be traced back to Chinese manipulation. These viewpoints could lead to public distrust in a pro-U.S. government, potentially impacting the outcome of Taiwan's democratic elections.

f. Taiwan Seeking Independence

According to an October 2023 survey by the Mainland Affairs Council of Taiwan, 86.2% of Taiwanese people favor maintaining the current status quo where Taiwan does not declare independence internationally but possesses de facto sovereignty. Of these, 20% support temporarily maintaining the status quo before pursuing independence, combined with the 5% advocating for immediate independence, making up around 25% of the population in favor of independence. Notably, about 30% of the Taiwanese population have not expressed a preference for either maintaining the status quo and then seeking independence or unification with China. This indicates that a majority of Taiwanese people may support or at least not oppose independence, suggesting a potential path towards independence in Taiwan's political development. (Mainland Affairs Council, 2023)

Should Taiwan actively seek independence through substantive measures in the future, China is likely to respond with military force. The U.S. government has historically adhered to a policy of not supporting unilateral changes to the status quo by either China or Taiwan, and the policy of strategic ambiguity aims to deter both Taiwan from declaring independence and China from using force. Taiwan's pursuit of independence could upset the U.S., potentially leading to policy

decoupling between the U.S. and Taiwan. This could significantly alter U.S.-Taiwan relations.

VIII. Conclusion

In the U.S. strategic vision, a peaceful, open, and stable East Asia aligns best with American interests. To achieve this vision, stability and development in Taiwan are essential. Given Taiwan's geopolitical significance and the strategic value of its democratic system, its role is crucial for the U.S. and its East Asian allies, potentially being a key to maintaining strategic interests in the region. Therefore, under the premise that there are no drastic changes in the political situation, the U.S. is likely to continue and even strengthen its security policy towards Taiwan. This is to ensure Taiwan's continued existence as a democratic regime and stable development, and possibly as a contributor to international affairs and regional peace, reinforcing security and stability in East Asia.

If China invades Taiwan and the U.S. still maintains military superiority and regional allies agree to support, it is quite probable that the U.S. would intervene militarily to defend Taiwan. This is because losing Taiwan, a key strategic partner in East Asia, would signify a strategic and military failure for the U.S. in the region. Such a loss would severely undermine the credibility of U.S. military deterrence, crucial for maintaining global order. Consequently, there might be more challengers to the international order or a shift in other countries aligning with a more dominant China.

From the perspective of offensive realism, a China that perceives the U.S. as a

threat will continue to challenge U.S. hegemony until it replaces the U.S. as the dominant power. According to hegemonic stability theory, China's challenge to the U.S. could lead to global instability and undermine the international financial, political, and military systems that the U.S. actively maintains and benefits from. Weighing the risks of war with China against the risks of losing Taiwan and destabilizing global strategic interests, engaging in combat with China might be the more prudent option. Therefore, there is a high probability that the U.S. would defend Taiwan in the event of a Chinese invasion, provided Taiwan does not provoke China or unilaterally alter the status quo (e.g., declaring independence).

Given the current U.S. policy towards Taiwan, which emphasizes enhancing Taiwan's resilience and defense capabilities, future policy designs may attempt to expedite the strengthening of Taiwan's military. This could include supplying more advanced weapons, C4ISR equipment, and ammunition reserves; and enhancing military training and reserve strength. The Tsai Ing-wen administration in Taiwan has recently focused on national defense issues and relations with the U.S., and these topics are also receiving attention in the ongoing elections to select the next government. Considering that the current ruling party, the Democratic Progressive Party (DPP), and the two major opposition parties, the Kuomintang (KMT) and the Taiwan People's Party, are all amenable to the U.S., (Liu, Hsu and Yeh, 2023) (Kuo and Mazzetta, 2023) it is foreseeable that Taiwan's future government will continue to align with

U.S. policy directions to improve national defense affairs. However, the extent of implementation will depend on the policymakers' capabilities and considerations regarding the impact on relations with China.

The U.S. House of Representatives passed the *Taiwan International Solidarity Act* on July 25, 2023, asserting that UN General Assembly Resolution 2758, recognizing the People's Republic of China as the sole legal representative of China in 1971, does not pertain to Taiwan. The U.S. also rejects China's claim that this resolution mandates other countries to recognize Taiwan as part of China. (H.R.1176, 2023) Concurrently, the U.S. is actively promoting Taiwan's participation in international organizations, effectively advocating for the normalization of Taiwan's diplomatic affairs. This signifies a strong current U.S.-Taiwan relationship. Taiwan should seize this opportunity to actively seek participation in international affairs. Given the precedent in diplomatic matters, increasing international engagement will likely open up more opportunities for involvement in other international affairs. Additionally, Taiwan could leverage the U.S.'s endorsement as a democratic leader to develop relations with other democratic countries. Closer ties with these democracies could mean greater support for Taiwan's security in the event of a Chinese invasion attempt.

In future developments, the China factor will be the most unstable element affecting the development of Taiwan-U.S. relations. China is expected to

continue competing with the U.S. due to ideological conflicts and its own security dilemmas. With the strategic value of Taiwan considered a core interest by China, it will inevitably continue trying to divide Taiwan-U.S. relations and interfere with U.S. policies towards Taiwan. The intensity of China's interventions will depend on the state of U.S.-China relations. Currently, after the Biden-Xi meeting in San Francisco in November 2023, the U.S. has re-established high-level military bilateral dialogues. (The White House, 2023) This aims to prevent strategic misjudgments escalating into military conflict due to a lack of communication channels between decision-makers, sending a positive signal for U.S.-China relations. If U.S.-China relations stabilize in the future, even if China attempts to interfere with U.S. policies towards Taiwan, it might opt for less intense interventions to avoid damaging U.S.-China relations and harming its own interests.

An important fact to note regarding China is the instability of its politics. In an authoritarian society like China, there is no clear, legitimate route to leadership, making internal power struggles the feasible means to power. These struggles are often brutal, leading those in power to be highly vigilant about their position. Failure to defend power in such a combative authoritarian context can result in tragic outcomes including loss of freedom, wealth, and personal safety. In such scenarios, leaders may distrust their political officials, leading to significant political instability. For example, China's former Foreign Minister Qin Gang, appointed in December 2022, mysteriously disappeared in

June 2023, with no clear explanation from the authorities, and was replaced in July. Similarly, China's former Defense Minister Li Shangfu, appointed in March 2023, vanished from public view after August and was replaced in October without clear official reasons. (Wei, 2023)

Should China's politics fall into major instability in the future, with the populace losing faith in the Communist Party's authoritarian rule, it might prompt the Chinese people to seek alternatives to the authoritarian regime. At this juncture, Taiwan's democratic governance, culturally and ethnically close to China, could become a reference model for governance in China. Therefore, one of Taiwan's strategic values lies in representing a possibility to change China's authoritarian politics without the need for forcible external intervention, granting Taiwan a unique strategic position internationally.

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