

Coercion and Cooperation in Cross-Strait Relations in Xi Jinping's Era (2012-2024):

The PRC, The ROC, The US

East Asian Studies
Faculty of Social Sciences
Master's Thesis

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20.5.2025
Turku

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Master's thesis

Subject: East Asian Studies

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Supervisor(s): Lauri Paltemaa

Number of pages: 94 pages

Date:

Abstract

This thesis explores the dynamics of coercion and cooperation in Cross-strait relations during Xi Jinping's era (2012-2024), and focuses on relations between the People's Republic of China (PRC), the Republic of China (ROC), and the United States (US). The paper employs historical institutionalist approach to examine how rotation within political institutions have influenced the balance of military, economic, and diplomatic strategies across the Taiwan Strait.

The study identifies key institutions in charge of Cross-strait relations, and categorizes coercive tools (military intrusions, espionage, cyber operations) and coercive mechanisms (trade, educational exchanges, tourism). The results of the thesis indicate a great increase in applied coercive measures, coupled with continuous decline in cooperative patterns. These results are linked with political developments in the studied countries - centralization of power around Xi Jinping in China, and consolidation of power around the DPP in Taiwan. The findings of the thesis assign great importance to institutional changes and continuity, ideological alignment, and difference in regime types in shaping the relations between the PRC, the ROC, and the US.

Key words: Cross-Strait Relations, People's Republic of China (PRC), Republic of China (ROC), United States (US), Xi Jinping

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1. Introduction

The question of Taiwan, originating from ambiguity of political status of the island, has been under scrutiny of political scientists, economists, foreign policy makers, and IR scholars. This question is approached both as a territorial issue, and as an issue of regime legitimacy. The current state of affairs was established as an outcome of the Chinese civil war, with the PRC regime in Beijing controlling the mainland China, and the ROC regime retreating to Taiwan. Politically, the situation that we observe today has to be traced back to 1949 - the year, when the last of the studied actors (the PRC) was established. Since this state of affairs was established, with the PRC administration in Beijing, and the ROC administration in Taipei – the PRC, the ROC and the US have developed different strategies in the relations with each other.

In the second half of the XX century, the PRC and the ROC both have undergone significant political and economic developments. These developments, which included liberalization of economy (both on the island and in the mainland), democratization (in Taiwan), and de-personalization (in the mainland China) have in turn triggered evolution in the relations between the actors, made these relations more complex and multifaceted. From the end of the XX century, Cross-strait relations cannot be characterized solely as a rivalry of two antagonistic regimes (although it is still takes a significant place in the analysis). These antagonistic regimes have had to coexist with each other - and they managed not only to coexist mostly peacefully, but to gain benefits from this coexistence. Investments of overseas Chinese have become a significant source for the growth of the PRC economy; educational and professional exchanges have allowed hundreds of thousands and millions of people to gain new skills, build their careers, and as a result improve quality of life on both sides of the Taiwan straits. Peaceful coexistence and stable development of both mainland China and Taiwan have benefited not only people in the mainland and on the island, but also globally. The US has managed to develop the relations with both regimes, and maintained its status as a global power.

Both the PRC and the ROC administrations have functioned in a situation of limited international legitimacy: for the PRC such situation was more relevant for the period from 1949 till 1971, and for the ROC from 1971 until present time. These have to take each other's presence into consideration, although they do not recognize adversary's sovereignty or legitimacy. This mutual presence has been both a source of threats and opportunities for the studied actors. Consequently, the relations between them can be characterized as periods of rising and decreasing tensions, and periods when they resort to coercion or prefer cooperative tools respectively.

A significant shift in the Cross-strait dynamics can be observed since the rise of Xi Jinping, who assumed leadership of the Chinese Communist Party in 2012 and soon after became the head of the Central Leading Group for Taiwan Affairs and the Central Military Commission. Under Xi's leadership, Beijing has taken a more assertive approach to Cross-strait relations, framing unification as a core element of national rejuvenation. At the same time, consolidation of power occurs also in the ROC and the US. These developments raise questions and concerns regarding coexistence of autocracies and democracies, efficiency of the established political mechanisms in democratic regimes, and depersonalization of power in autocracies.

This thesis aims to investigate the Cross-strait relations in a period from 2012 to 2024 in the context of shifting dynamics in coercion and cooperation between the actors - the PRC, the ROC, and the US. The research examines the impact of changes

within key institutions responsible for Cross-strait relations on the patterns of interactions between the actors, therefore a specific focus on composition of the ROC, the PRC, and the US institutions is provided. As a result, the paper aims to provide analysis of the Cross-strait relations from different points of view, and to trace developments in exchanges (professional, educational, and tourist), money flows (exports and investments), military and espionage activities.

Consequently, the thesis links institutional rotation with changes in intensity of cooperation and coercion in Cross-strait relations. The section *Theoretical framework* introduces the key theoretical concept that the present research relies on (historical institutionalism), justifies its choice, and applies this theory for analysis of political apparatus of the PRC and the ROC. The section *Institutional Analysis of the PRC, the ROC, and the US* examines the key institutions responsible for handling of the Cross-strait relations, and explores the changes that occurred in these institutions. The section *Developments in Cooperation and Coercion* highlights the importance of these changes, demonstrating how intensity of cooperation and coercion have changed. The concepts of cooperation and coercion themselves are divided into four domains: money flows (trade and investments), people-to-people exchanges (professional, educational, tourist, and political exchanges), non-military coercion (espionage and cyber threats), and military coercion (military expenditure, arms sales, and ADIZ intrusions).

My objectives of the research are:

- Explore changes in composition of the responsible institutions of the PRC, the ROC, and the US
- Analyze the impact that these changes have exerted on the relations between the actors

In order to achieve these objectives, the following research questions were formulated:

1. What institutions are responsible for policy-making on Cross-strait relations?
2. What changes have occurred in these institutions?
3. How these institutional changes have influenced cooperation and coercion in Cross-strait relations

Much of the research that has been conducted on Cross-strait relations has focused on the analysis of relevant models and frameworks, and how they have been framed in international relations in general and in Cross-strait relations in particular. Among these frameworks and models, the most prominent are one-China principle and different ways of referring to it¹, the 1992-Consensus², and “One Country - Two Systems”³. In the analysis of these frameworks, researchers mostly focused on evolution of the PRC approach. On the one side, it allows us to track how China framed its relations with Taiwan in different periods of time, but on the other side the agency of other actors - the ROC and the US - is not taken into consideration.

Simona Grano provides another perspective in her research. She examines approaches and measures applied by both the PRC and the ROC, and elaborates on the influence that domestic political processes in Taiwan exert on the US and mainland China. As a result, a complex picture of Cross-strait relations is constructed. This picture includes interconnection between the three actors (the PRC, the ROC,

¹ Ja Ian, C. (2023, February). *The many “One Chinas”*: Multiple approaches to Taiwan and China.

² Chen, Y.-J., & Cohen, J. A. (2019). China-Taiwan relations re-examined: The '1992 Consensus' and cross-strait agreements. *University of Pennsylvania Asian Law Review*, 14(1).

³ Huang, J. (2017). Xi Jinping’s Taiwan policy: Boxing Taiwan in with the One-China framework. In L. Dittmer (Ed.), *Taiwan and China: Fitful embrace* (pp. 239–248). University of California Press.

and the US)^{4,5}, different modes of self-representation at the international stage by the PRC and the ROC⁶, and both continuity and changes in the PRC narratives on Taiwan^{7,8}. Detailed examination of Cross-strait relations that takes into consideration different frameworks proposed by both the PRC and the ROC and traces dynamics in tourism exchanges and military build ups was done by John Curtis and Winnie King in the parliamentary report for the House of Commons⁹.

As such, the existing studies elaborate on important aspects of Cross-strait relations, and examine the existing frameworks, the interconnectivity between the actors, how they frame themselves, and how exchanges between Taiwan and mainland China have changed in the course of historical development. What I strive for in my research is an institutional focus that would explain the dynamics in Cross-strait relations as a result of changes in institutions that make decisions in these relations. Therefore, to better understand the reasons and origins of changes in the triangle PRC-ROC-US, it is necessary to study how institutions of these countries have changed.

⁴ Grano, S. A. (2024). The geopolitical implications of the Taiwanese elections for China, the United States and the world. *Asia Society Policy Institute*.

⁵ Grano, S. A. (2023). The 2024 Taiwanese elections: A primer. *Asia Society Policy Institute*.

⁶ Grano, S. A. (2022). Cat-warriors vs wolf-warriors: How Taiwan promotes its brand in the face of a more assertive China. *Taiwan Insight*

⁷ Grano, S. A., & Wu, H. Y. (2021). Xi Jinping's 2.0 version of the "Letter to compatriots in Taiwan." *Taiwan Insight*

⁸ Grano, S. A. (2023). 'Letters to Taiwanese compatriots': The PRC's unification ideology and Taiwanese response in cross-strait communication. *International Journal of Taiwan Studies*, 7(1), 37–64

⁹ Curtis, J., & King, W. (2023). Taiwan: Relations with China. *House of Commons Library, Research Briefing*.

2. Institutionalism and Its Variations

Theoretical backbone of the present research is institutionalism, and more precisely is historical institutionalism. Historical institutionalism is the theory that is used to navigate through the obtained data and explain it. The current chapter justifies the choice that is made by the researcher, explains the differences between different varieties of institutional theory, and tries to apply historical institutionalism theory to the state apparatus of the PRC and the ROC.

Firstly, some clarification should be done on the concept of “institutionalism” itself. Institutionalism, in an essence, is an approach in social and political science that focuses on institutions of government and society. These institutions can be formal (such as organizations, parties, parliaments) or informal (common rules, customs, traditions). What is common for both formal and informal institutions is that they are means to structurize human interactions¹⁰. Therefore, since both formal and informal institutions put limitations on individuals by structuring their interactions, we can say that they influence behavior of individuals¹¹. An explicit and detailed definition of an “institution” was provided by Elinor Ostrom: “Institutions are rules used by individuals for determining who and what are included in decision situations, how information is structured, what action can be taken and in what sequence, and how individual actions will be aggregated into collective decisions...all of which exist in a language shared by some community of individuals rather than as physical parts of some external environment”¹². The definition given by Ostrom is especially relevant for the present research: it encompasses the limitations, constraints and empowerment for members of institutions and their subordinates (“who and what are included in decision situations”), control over the information flows and ideas that can be exercised via institutions (“how information is structured”), patterns of action (“what action can be taken and in what sequence”), influence that individual members of an institution exert on the collective decision of this institution (“how individual actions will be aggregated into collective decisions”). Ostrom also assigns importance to the existence of some kind of a structure within a group of people - “a language shared by some community of individuals”.

How else is institutionalism defined in theoretical literature? In his book “Institutional Theory in Political Science: the New Institutionalism”, B. Guy Peters does not provide an explicit definition of the concept of institutionalism. However, he does point out distinctive features of this approach. Among these characteristics, he highlights structural feature of the studied society and/or polity, persistence of stability over the long period of time, influence that a studied institution exerts over collective behavior, and some set of shared values and meaning among members of a studied institution¹³. So, when we operate with the theory of institutionalism in the present research, we understand, that the decisions on Cross-strait relations are made in some structural frames (and, moreover, the behavior of individuals who are members of institutions in charge of Cross-strait relations is influenced by their

¹⁰ North, D. C. (1990). *Institutional change and economic performance* (pp. 36–37). Cambridge University Press.

¹¹ Bell, S. (2005). Institutionalism: “Old and new.”

¹² Kiser, L. L., & Ostrom, E. (1982). The three worlds of action: A metatheoretical synthesis of institutional approaches in strategies of political inquiry. In *Strategies of political inquiry* (Sage Focus Editions, 48, p. 179)

¹³ Peters, B. G. (2019). *Institutional theory in political science: The new institutionalism* (4th ed.). Edward Elgar Publishing.

membership itself (this perspective is defined as the “logic of appropriateness”¹⁴), and that members of the examined institutions share some common values and behave in accordance with some norms. Considering the definition of Ostrom, we also point out at the influence that institutions exert over structuring of information and determination of possible actions.

It is necessary to define, how institutional approach differs from “non-institutional” approaches, and why these other approaches cannot be applied just as comprehensively as institutionalism in the present research. As such, the theory of institutionalism sees membership in organizations and collectives as a crucial point in explaining behavior of individuals. On the contrary, theoretical approaches of rational choice and behaviorism assume that individuals act relying on their calculations of personal utility of taken decisions (for the former), or based on their own socio-psychological characteristics (for the latter). We cannot dismiss these models entirely - of course, both social context of politics and the motives of individual actors are important, and can be relevant for examination of Cross-strait dynamics. In particular, rational choice theory potentially can be used for analysis of the actions taken by the PRC, the ROC, and the US governments. If the desired outcomes for each side are identified, each of these actors can be viewed as one making choices in order to produce the desirable outcomes¹⁵.

However, I would align with March and Olsen¹⁶, and argue for a more autonomous role of political institutions. Institutional approach should gain broader attention in attempts to explain interactions between the PRC, the ROC and the US, since institutions define the frames through which these interactions occur. Institutions are crucial in formation of political landscape; interactions between individuals also occur within the institutions. The existing patterns of cooperation and coercion were also created and developed by institutions of the studied countries - this is why it becomes so important to look at their interactions through the lens of institutional analysis. Even if we take into consideration an ongoing personification of decision-making around Xi Jinping in the PRC, it is still visible that he yields and increases his power and influence through his membership in institutions and through institutional appointments in the Central Military Commission, small leading groups, and in the party in general¹⁷. Therefore, even considering the centrality of Xi Jinping in the current PRC regime, he still cannot be seen as an atomistic actor separated from the existing government institutions.

Then, it becomes important to differentiate between the varieties of institutionalism, and to clarify, why a perspective of historical institutionalism is more relevant for the research than the others. Institutionalism, as a theoretical approach, has been developed from the “old” to the “new” version in political science. As S. Bell writes, “old” institutionalist scholars of the 19th and early 20th century were focused on the institutional arrangements between government and society. Developments and practices founded by researchers of “old” institutionalism have been logically applied in the fields of public administration and constitutionalism. If we turn to the “new” institutionalism, as V. Lowmpe points out, it is not as concerned

¹⁴ March, J. G., & Olsen, J. P. (2009). The logic of appropriateness. In R. Goodin, M. Moran, & M. Rein (Eds.), *The Oxford handbook of public policy*. Oxford University Press.

¹⁵ Green, L. S. (2002). Rational choice theory: An overview. Prepared for the Baylor University Faculty Development Seminar on Rational Choice Theory

¹⁶ March, J. G., & Olsen, J. P. (1984). The new institutionalism: Organizational factors in political life. *American Political Science Review*, 78(3), 734–749

¹⁷ Li, C. (2016). *Chinese politics in the xi jinping era : Reassessing collective leadership*. Brookings Institution Press, pages 18-20

with describing formal-legal arrangements and constitutions, but instead aims at examining structures and rules that influence political behavior¹⁸. At the same time, the “new institutionalism” is not seen as a single inseparable approach. For example, B. Guy Peters points out six branches of “new institutionalism”: normative institutionalism, rational choice institutionalism, historical institutionalism, empirical institutionalism, international institutionalism, discursive and constructivist institutionalism, and sociological institutionalism. With reliance on the B. Guy Peters’ classification and his implication regarding each branch of institutionalism, this chapter will provide a brief overview of these types of the new institutionalism, with particular emphasis on the historical institutionalism.

To start with, I will consider normative institutionalism. It argues, that in order to understand, how institutions operate and how they influence individual behavior, it becomes important to study the norms of institutions. These norms create the “logic of appropriateness” among members of an institution - an idea of what is appropriate and what is not, that originates from the rules of an institution and guides behavior of individuals¹⁹. According to normative institutionalism perspective, behavior of individuals can be explained through normative standards²⁰, and not through their desire to maximize personal utilities - contrary to rational choice scholars²¹.

Then, I will proceed with rational choice institutionalism. As it follows from the name itself, one can expect a combination of both institutionalist and rational choice perspectives in this approach. Indeed, contrary to normative institutionalism scholars, rational choice institutionalists argue, that behavior of individuals is guided not only by norms, but also (and especially) by rules and incentives that are intended to maximize personal utility for members of an institution^{22,23}. Therefore, this particular branch of institutionalism is widely used in order to analyze, how economic and social necessities are regulated by individuals in institutions^{24,25,26,27}.

Empirical institutionalism assigns particular importance to examination of structure of different institutions. This branch of institutionalism is especially relevant for comparative analysis, since the main question that empirical institutionalists try to answer is how structural differences in institutions of different countries are linked with differences in development of the studied countries (see, for example, Arend Lijphart’s comparative analysis research on different types of government systems

¹⁸ Lowndes, V. (1996). Varieties of new institutionalism: A critical appraisal. *Public Administration*, 74(2), 181–196.

¹⁹ March, J. G., & Olsen, J. P. (2009). The logic of appropriateness. In R. Goodin, M. Moran, & M. Rein (Eds.), *The Oxford handbook of public policy*. Oxford University Press.

²⁰ Thompson, F. D. (1995). Ethics in Congress: From individual to institutional corruption. *The Brookings Institution*.

²¹ Peters, B. G. (2000). Institutional theory: Problems and prospects. *Reihe Politikwissenschaft / Institut für Höhere Studien, Abt. Politikwissenschaft*, 69, 2

²² Grafstein, R. (1992). The rational choice solution. In *Institutional realism: Social and political constraints on rational actors* (pp. 60–88). Yale University Press.

²³ Schneider, G., & Ershova, A. (2018). Rational choice institutionalism and European integration. *Oxford Research Encyclopedia of Politics*.

²⁴ Sen, A. (1997). *Choice, welfare and measurement*. Harvard University Press.

²⁵ Arrow, K. J. (2012). *Social choice and individual values* (3rd ed.). Yale University Press.

²⁶ Black, D. (1948). On the rationale of the group decision-making. *Journal of Political Economy*, 56, 23–34

²⁷ Aggarwal, V. K., & Dupont, C. (1999). Goods, games, and institutions. *International Political Science Review*, 20(4), 393–409. <http://www.jstor.org/stable/1601403>. Accessed 3 Mar. 2025.

and performance of these systems²⁸, or the examination of correlations between differences in monetary policy institutions with economic performance by Grilli, Masciandaro, and Tabellini²⁹, also Goodman on independence of central banks from political control³⁰).

International institutionalism pays attention to institutions that govern international relations, and examines how these institutions influence the behavior of states and their subjects³¹. Unlike other branches of the “new” institutionalism that have evolved from “old” versions, international institutionalism theory has not been developed as a revival and modification of previous theoretical models. Theoretical development of international institutionalism has attracted profound scholarly attention and gained momentum after problems of interdependence had become clear and created an interest to institutions during the oil crises of 1970s³². The theory of international institutionalism, that tries to explain patterns of international cooperation, is contrasted to the theory of realism in international relations³³, which stresses competitive and conflictual side of international politics³⁴. In particular, the perspective of international institutionalism has been used for comparative analysis of international environmental regimes^{35,36,37}; adaptability, resilience and institutional change in international organizations³⁸; and interconnection of domestic politics and international relations³⁹.

Contemporary sociological institutionalism stresses the role of values and symbols in functioning of institutions and constraining of individuals’ behavior. The origins of the idea that values and symbols are important for political life can be traced back to Durkheim’s notion of “mechanical solidarity” between individuals which is shaped through likeness, and “organic solidarity”, which is formed through the division of labour⁴⁰. Durkheim argued, that division of labour and likeness between individuals are the forces that contribute to construction of links within a society, and hence influence the nature of institutions. Durkheim’s ideas on social organization found their development in works of Mary Douglas. Douglas observed, how social relations are ordered through various elementary forms - such as markets, networks, and hierarchies. She investigated, how these elementary forms shape

²⁸ Lijphart, A. (1999). *Patterns of democracy: Government forms and performance in thirty-six countries*. Yale University Press.

²⁹ Grilli, V., Masciandaro, D., & Tabellini, G. (1991). Political and monetary institutions and public financial policies in the industrial countries. *Economic Policy*, 6(13), 341–392

³⁰ Goodman, J. F. B. (1991). The politics of central bank independence. *Comparative Politics*, 23, 329.

³¹ Levy, M. A., Young, O. R., & Zurn, M. (1995). The study of international regimes. *European Journal of International Relations*, 1(3), 267–330.

³² Jönsson, C., & Tallberg, J. (2001). Institutional theory in international relations

³³ Keohane, R. O. (1982). The demand for international regimes. *International Organization*, 36(2), 325–355

³⁴ Korab-Karpowicz, W. J. (2023). Political realism in international relations. In E. N. Zalta & U. Nodelman (Eds.), *The Stanford Encyclopedia of Philosophy* (Winter 2023 Edition).

³⁵ Levy, M. A., Haas, P., & Keohane, R. (1992). Institutions for the Earth. *Environment: Science and Policy for Sustainable Development*, 34(4), 12–36.

³⁶ Weiss, E. B., & Jacobson, H. K. (1998). *Engaging countries: Strengthening compliance with international environmental accords*. MIT Press.

³⁷ Young, O. R. (2010). Institutional dynamics: Resilience, vulnerability and adaptation in environmental and resource regimes. *Global Environmental Change*, 20(3), 378–385.

³⁸ Wallander, C. A. (2000). Institutional assets and adaptability: NATO after the Cold War. *International Organization*, 54(4), 705–735.

³⁹ Putnam, R. D. (1988). Diplomacy and domestic politics: The logic of two-level games. *International Organization*, 42(3), 427–460.

⁴⁰ Durkheim, É. (1933). *The division of labor in society*. Free Press of Glencoe.

human cognition, what classification systems do individual members of social groups maintain in their daily practices, and what thought styles persist in different social groups⁴¹. In the result, the grid-group typology that is used to analyze organizational culture and public policy issues were introduced to cultural theory⁴², and later reworked and modified by other scholars of sociological institutionalism^{43,44,45,46,47}.

Discursive (or constructivist) institutionalism explains actions of individuals through ideas and discourse. According to proponents of this approach, policy actors generate the ideas and communicate them in a public sphere. Since this communication between actors themselves and public occurs in institutional setting, therefore institutionalist perspective is taken into consideration. The focus on ideas and discourse interaction, which is incorporated into discourse institutionalism, provides an opportunity to trace change of institutions in dynamics - through change of ideas and discourse themselves⁴⁸. Scholars of discourse institutionalism emphasize both the abilities of individuals that allow them to create new and maintain existing institutions - “background ideational abilities”, and the abilities not only maintain, but also change the existing institutions - “foreground discursive abilities”^{49,50,51}.

⁴¹ Clegg, S., Logue, D., McCabe, A., Mol, M. J., Phillips, N., Pierides, D., & Sewell, G. (2016). How institutions really think: Mary Douglas and meaningful organizations. *Academy of Management Proceedings*, 2016(1).

⁴² Douglas, M. (1996). *Natural symbols: Explorations in cosmology* (p. 60). Routledge.

⁴³ Schwarz, M., & Thompson, M. (1990). *Divided we stand: Redefining politics, technology, and social choice* (pp. 5–7). University of Pennsylvania Press.

⁴⁴ Bernstein, B. (2003). *Class, codes and control. Volume 1: Theoretical studies towards a sociology of language* (p. 128). Routledge.

⁴⁵ Bernstein, B. (2003). *Class, codes and control. Volume 2: Applied studies towards a sociology of language* (pp. 44–45). Routledge.

⁴⁶ Rayner, S. F. (1979). The classification and dynamics of sectarian forms of organisation: Grid/group perspectives on the far-left in Britain (p. 94). University College London.

⁴⁷ Oldroyd, D. R. (1986). Grid/group analysis for historians of science? *History of Science*, 145–171.

⁴⁸ Beland, D., & Cox, R. H. (2011). *Ideas and politics in social science research* (p. 49). Oxford University Press

⁴⁹ Schmidt, V. A. (2008). Discursive institutionalism: The explanatory power of ideas and discourse. *Annual Review of Political Science*, 11(1), 303–326.

⁵⁰ Schmidt, V. A. (2010). Taking ideas and discourse seriously: Explaining change through discursive institutionalism as the fourth new institutionalism. *European Political Science Review*, 2(1), 1–25

⁵¹ Wahlström, N., & Sundberg, D. (2017). Discursive institutionalism: Towards a framework for analysing the relation between policy and curriculum. *Journal of Education Policy*, 33(1), 163–183

3. Historical Institutionalism and Its Application to Cross-Strait Relations

At last, we can turn to historical institutionalism. According to the perspective of historical institutionalists, policy choices made by individuals during the formation of an institution (or initiation of a policy project) will have profound influence far into future, and therefore influence and constraint subsequent policy choices of individual actors. This core logic of historical institutionalist explanation of individuals' political behavior is understood as "path-dependency"^{52,53}. Therefore, by making choices during initiation of a policy or formation of an institution, actors step on some path and create an inertial tendency, that requires sufficient pressure to be reversed - changes become costly for an institution. Moreover, choices made by individuals at the formation stage do not only constrain further choices, but also influence capabilities and preferences of the members of an institution⁵⁴. Regarding a set of options that is at the disposal of the members of an institution on the path-dependency, there are question arise: how limited this set is, and is it possible for an institution to expand this set of options?

At the same time, historical institutionalists recognize, that institutions are not static, and indeed they change. Among mechanisms of change that scholars emphasize, there are learning - by responding to new information, institutions are capable to reframe and adjust their decisions; new ideas - policy and decision-making can be influenced through generation and creation of new ideas (however, then the question arises, if old members of an institution are able to generate these new ideas, or it becomes necessary to recruit new members); and "incremental adjustments" - relatively small adjustments of the status-quo, made on actors' assumptions on what is practical and what is possible⁵⁵. What seems similar in these explanations of institutional changes is that a change is not something produced by actors voluntarily - instead, there must be some force strong enough to make them learn from experience, engage with new ideas, or pursue adjustments of a status quo.

So far, I would like to address a detail in the approach of historical institutionalism. Besides inertial influence of past policy choices, it is the role of ideas that historical institutionalists assign to policy-making and institutional formation itself⁵⁶. Indeed, the choices and institutional arrangements are made by humans - therefore, it becomes important to understand, what ideas guided actors' political behavior. And change in ideas held by political actors can be a significant driver for institutional change. The close attention that historical institutionalists pay to the role of ideas in analysis might align them with discourse institutionalists. However, the role of historical events and previous choices in explanation of actors' political behavior is a point of difference between discourse and historical institutionalist approach.

Here, we can apply historical institutionalist approach in an attempt to explain, what motivation has guided political behavior within the framework of Cross-strait

⁵² Pierson, P., & Skocpol, T. (2002). Historical institutionalism in contemporary political science. In I. Katznelson & H. V. Milner (Eds.), *Political science: The state of the discipline* (Vol. 3, No. 1, pp. 1–32).

⁵³ Mahoney, J. (2000). Path dependence in historical sociology. *Theory and Society*, 29(4), 507–548

⁵⁴ Krasner, S. D. (1988). Sovereignty: An institutional perspective. *Comparative Political Studies*, 21(1), 72–73

⁵⁵ Atkinson, M. M. (2011). Lindblom's lament: Incrementalism and the persistent pull of the status quo. *Policy and Society*, 30(1), 10

⁵⁶ Lieberman, R. C. (2002). Ideas, institutions, and political order: Explaining political change. *American Political Science Review*, 96(4), 697–712.

relations, and what constraints have been imposed on individual actors in charge of policy-making in the state apparatus of the PRC, the ROC, and the US. It is important to note that the studied political systems are different: while the ROC and the US are democracies at the moment, the PRC is a party autocracy. Hence the formation and development of state institutions in each of these regimes has undergone in different circumstances, therefore different explanations have to be employed in the analysis of actors' behavior.

Starting from the analysis of the PRC institutions, it is important to understand the regime conditions that these institutions were formed under. Topologically, the PRC regime is a party autocracy, and the main goal of an autocracy is to maintain an autocrat in power. In case of a party autocracy, such autocrat is the party, and in case of the PRC this party is the CCP. The leading role of the party is emphasized in the PRC constitution, and the PRC state structure mirrors the one of the party - these factors support an assumption on the primary role of regime existence⁵⁷. I would argue further, that maintenance of the party in power was the main idea that motivated individuals' choices in the process of institutional formation.

How exactly was this idea embodied in the political behavior? I would consider the institutions particularly important for the analysis of the PRC's Cross-strait policy-making - the Central Military Commission (the CMC), the Taiwan Affairs Office (the TAO), and the Taiwan Affairs Leading Small Group (the TALSG). The CMC was established in 1954, and was chaired by Mao Zedong. The CMC is currently chaired by Xi Jinping personally, is subordinate to the CCP Central Committee, and supervises the People's Liberation Army (the PLA). Its functions include operational oversight over the PLA, command of the armed forces, and providing the link between the party and the military. Being the linkage between the party and the military, the CMC successfully ensures, that it is the party commands the gun, and the gun is not allowed to command the party⁵⁸. The establishment of the CMC confirms, on the one side, Mao's belief on the nature of political power ("Political power grows out of the barrel of a gun"⁵⁹), and on another side, serves as a reflection of an idea that the political power should not be transferred to the military. It is important to note, that the CMC itself is not an institution established from scratch: its predecessors were the People's Revolutionary Military Commission of the Central People's Government (established in September 1949), the Revolutionary Military Commission of the CCP Central Committee (established in August 1937), the Front Committee of the Fourth Red Army (established in 1928-1929)^{60,61}. It is evident, that indoctrination of loyalty to the party within the military had been a priority for the CCP leadership long before the establishment of the PRC, and the

⁵⁷ Guo, S. (2012). *Chinese politics and government : Power, ideology and organization*. Taylor & Francis Group, pages 136-154

⁵⁸ Mao Tse-tung. (1938, November 6). *Problems of war and strategy*. Selected Works of Mao Tse-tung https://www.marxists.org/reference/archive/mao/selected-works/volume-2/mswv2_12.htm

⁵⁹ Li, G. (1995). *A Glossary of Political Terms of the People's Republic of China*. Chinese University Press, page 325

⁶⁰ Ying, X. (2021). The setting up and adaptation of 'democratic centralism' in the Chinese Workers' and Peasants' Red Army: The Jiangxi Fourth Red Army led by Mao Zedong. *Journal of Modern Chinese History*, 15(1), 1-19

⁶¹ The 100th Anniversary of the Founding of The Communist Party of China. (2021). *Marching under the banner of the Communist Party of China: The People's Military celebrating the centenary of the Communist Party of China*.

<http://fi.china-embassy.gov.cn/eng/xwtd/202107/P020210911830627692232.pdf>

Central Military Commission established in 1954 is a logical development of the previous institutions.

Therefore, the main objective behind the CMC functioning is prevention of military coups. Indeed, for a party autocracy, not only democratic transition, but also a military coup posits a threat for regime survival. This historical legacy of the party's awareness of how dangerous the coups are, and how important it is to keep the army loyal to the party, can be seen in the recent dismissal of the former CMC Political Work Department director Miao Hua after the articles that displayed ideological deviations were published by the PLA Daily and did not receive any criticism from the CMC Political Work Department⁶².

Another way of managing the coup threat by the CCP is economic performance. According to the studies on interconnection between economy and regime resilience^{63,64}, poverty increases the risk of a military coup both for democratic and autocratic regimes. As such, Dengist economic incentives that have transformed China's economic model should be observed as a measure to improve the regime's credibility, and avoid increase in risks of military coups due to poor economic performance. These risks were at the highest point after the policies of the Great Leap Forward and the Cultural Revolution, and culminated in 1971 when the Minister of National Defense and the Vice Chairman of the CCP Lin Biao died in the airplane crash over Mongolia and was posthumously accused of plotting a coup against Mao⁶⁵.

As we see, keeping the army loyal to the party has been a top priority for the CCP leadership long before the establishment of the PRC. The main idea that stood behind the foundation of the Central Military Commission was enhance in regime security through ideological indoctrination within the armed forces, and any signs of disloyalty or ideological deviation can result in purges of officials within the CMC. At the same time, the awareness of the CCP leadership is justified, as the studies and China's own political experience demonstrate.

Moving forward towards the Taiwan Affairs Leading Small Group (TALSG) and the Taiwan Affairs Office (TAO), I would argue that the main objective in establishment and functioning of these institutions was securing the CCP's ruling position. It is necessary to point out, that the Taiwan issue is not merely a territorial issue, but also (and more importantly) a legitimacy issue for the party. As long as there is a regime that can be seen as an alternative to the CCP rule by elites in

⁶² The articles published by the PLA Daily favored collective leadership and intra-party democracy, in contrast to the term "the CMC Chairman Responsibility System", which upholds the supreme authority of Xi Jinping. Miao Hua has been under suspension due to disciplinary violations

Pittman, K., Turek, A., & Chung, Y. (2025, March 14). *China-Taiwan weekly update*. Institute for the Study of War & American Enterprise Institute. <https://understandingwar.org/background/chna-taiwan-weekly-update-march-14-2025>

Sperzel, M., Shats, D., O'Neil, A., Wugang, K., Mattimoe, F., Morgan, G., Turek, A., & Chung, Y. (2025, January 9). *China-Taiwan weekly update*. Institute for the Study of War & American Enterprise Institute.

<https://www.understandingwar.org/background/chna-taiwan-weekly-update-january-9-2025>

Chen, L. (2024, November 28). Senior Chinese military official Miao Hua under investigation, Defense Ministry says. *Reuters*

<https://www.reuters.com/world/china/senior-chinese-military-official-under-investigation-defence-ministry-says-2024-11-28/>

⁶³ Londregan, J. B., & Poole, K. T. (1990). Poverty, the coup trap, and the seizure of executive power. *World Politics*, 42(2), 151–183.

⁶⁴ Geddes, B. (2004). *Authoritarian breakdown* (p. 22). Department of Political Science, UCLA.

⁶⁵ Muhlhahn, K. M. (2019). *Making China modern: From the Great Qing to Xi Jinping* (1st ed., pp. 473–476). Harvard University Press.

mainland China, this situation will threaten the party's legitimacy. More precisely, the existence of an alternative regime in Taiwan can be seen as an attractive alternative by China's economic elites (due to safer and more stable conditions for assets and businesses that are provided by democratic system, and especially after the party has taken attempts to enhance its influence over businesses⁶⁶) and political leadership (due to safety concerns affiliated with the risks of prosecution, especially considering the ongoing and intensifying purges). At the same time, establishment of a regime unrelated to mainland China in Taiwan (formal declaration of Taiwan's independence) does not decrease the above mentioned risks. Moreover, such situation can provoke louder appeals for democracy in Hong Kong, and evoke nationalist appeals in Tibet and Xinjiang, what indeed would threaten the regime stability. Therefore, an approach towards the issue of Taiwan from the PRC perspective should include not only territorial, but also regime aspect of the issue.

Taiwan Affairs Office, established in 1955, is in charge of policy administration on Taiwan and communication across the straits; Taiwan Affairs Leading Small Group, established in 1954⁶⁷, is a key institution in charge of policy coordination and formulation. Although the TALSG was established as early as in 1954, its role diminished during the period of the Cultural Revolution (1966-1976). It was after the re-establishment of the TALSG in 1980 when the progress in Cross-strait affairs became possible⁶⁸. The scope of tools at the PRC's disposal to utilize in its policy-making on Taiwan has broadened, and included not only military or political measures, but also economic means. A probability of peaceful reunification was articulated by the CCP authorities, economic and cultural exchanges between the two sides thrived, and the CCP has acquired opportunities to influence not only ROC elites, but also the Taiwanese society as a whole⁶⁹. With intensification of contacts across the straits, the role of intra-party institutions that specialized on Taiwan affairs - the TAO and the TALSG - has increased.

The main idea that guided establishment of the studied PRC institutions (the CMC, the TAO, and the TALSG) was enhance of regime resilience against various threats. In case of the CMC it has been the threat of a military coup, in case of the TAO and the TALSG - the fear of democratization processes that could be stirred up from communication with an alternative Chinese regime. Development of these institutions have served the main purpose (maintenance of the CCP in power), and responded to the risks affiliated with the threats - through changes in the CMC composition, ideological indoctrination within the army, and moderation of the party's policy on Taiwan (and particularly through evolution of the United Front tactics).

At this point, I would consider ideas that were relevant at the formation of the ROC institutions relevant for the policy-making on Cross-strait affairs - the National Security Council (the NSC) and the Mainland Affairs Council (the MAC). Here it is important to note, that political regime in Taiwan has undergone significant changes,

⁶⁶ Almen, O., & Carlsson, H. (2025, February). *The Chinese Communist Party's influence over businesses*

⁶⁷ 张磊. (2015). 对我国领导小组的历史考察 [A historical study of China's leadership groups]. *党史资料与研究* [Party History Materials and Research]

⁶⁸ Miller, A. (2008). The CCP Central Committee's leading small groups. *China Leadership Monitor*, (26), 4-5.

⁶⁹ Zhao, S. (1999). Military coercion and peaceful offence: Beijing's strategy of national reunification with Taiwan. *Pacific Affairs*, 72(4), 495-512. <https://doi.org/10.2307/2672394>.

from personalist autocracy (1949-1975) and party autocracy (1975-1996) to democracy (since 1996). Therefore, both transformation and persistence of autocratic legacies of the past can be expected in the studied institutions.

The National Security Council was established in 1967 as an advisory body subordinated to the ROC President (Chiang Kai-shek at that time) and was assigned with tasks on assisting and planning security strategy of the ROC. Its scope of expertise encompasses, besides relations with the Mainland China, foreign affairs, foreign intelligence collection and analysis, and domestic security and counter intelligence⁷⁰. This institution also had its predecessor - the National Defense Council (established in 1952). Both the NSC and its predecessor were formed as bodies necessary to suppress communist forces, and appeared as a result of provisions to the constitution of the ROC - “Temporary Provisions Effective During the Period of National Mobilization for Suppression of the Communist Rebellion” (1948)^{71,72,73}. These provisions allowed the President to “adjust the administrative and personnel agencies and their organization of the central government to meet the needs of mobilization for the suppression of insurgency” (Article 5), and allowed the President to establish institutions necessary to suppress rebellion (Article 4). Organizational outline and functions of the NSC were eventually solidified by the Presidential Communique №2439⁷⁴. This legal framework, coupled with the martial law, provided the President with the broad array of tools to suppress the opposition and stay in power regardless of the term restrictions prescribed by the Constitution⁷⁵. After the provisions were abolished in 1991, the influence of the NSC has decreased; however, it is still directly chaired by the ROC President, and its staff is appointed by the President^{76,77}. Hence, it is evident, that the ROC President has enjoyed strong position in security matters. His powers (and those of his party - the KMT, Kuomintang) were broadened by the temporary provisions and martial law in order to successfully suppress the opposition and consolidate the power around the President (Chiang himself) and the party (the KMT). Although president’s credentials were limited after abolition of martial law in 1987 and temporary provisions in 1991, he still assumes the key position in personnel appointment and overall functioning of the NSC.

⁷⁰ Swaine, M. D. (1999). *Taiwan’s national security, defense policy, and weapons procurement processes* (pp. 12–13). National Defense Research Institute.

⁷¹ 中華民國總統府 [Office of the President, Republic of China, Taiwan]. (n.d.). *Constitution of the Republic of China (Taiwan)*

<https://english.president.gov.tw/page/93>

⁷² 全國法規資料庫 [Laws and Regulations Database of the Republic of China, Taiwan]. (n.d.). 動員戡亂時期臨時條款 [Temporary Provisions during the Period of Mobilization for the Suppression of Communist Rebellion].

<https://law.moj.gov.tw/LawClass/LawAll.aspx?pcode=A0000005>

⁷³ Yu, C.-T. (尤正才). (2002). 我國國家安全會議憲政定位之研究 [The study of the National Security Council of the Republic of China] (Master’s thesis). 國立臺灣大學 [National Taiwan University].

⁷⁴ 中華民國總統府 [Office of the President, Republic of China, Taiwan]. (1972). 修正動員戡亂時期國家安全會議組織綱要 [Revised Organizational Guidelines of the National Security Council during the Period of Mobilization for the Suppression of Communist Rebellion].

<https://www.president.gov.tw/Page/294/38428>

⁷⁵ Lee, Y.-L. (2018, August 8). The performance, obstacle, and opportunity of transitional justice: The case of Taiwan (Part I). *Global Taiwan Institute, Global Taiwan Brief*, 3(16)

⁷⁶ 全國法規資料庫 [Laws and Regulations Database of the Republic of China, Taiwan]. (n.d.). 國家安全會議處務規程 [Regulations on the Operation of the National Security Council]

<https://law.moj.gov.tw/LawClass/LawAll.aspx?pcode=A0010103>

⁷⁷ Chen, Y. W. (2010). The modernization of Taiwan’s National Security Council. *China Brief*, 10(22)

The Mainland Affairs Council (the MAC) - is an agency responsible for planning and handling of the affairs between the ROC government and mainland China. It was established in 1990 as a subordinate agency under the Executive Yuan, and marked a significant reduce of tensions between the ROC and the PRC^{78,79}. Its predecessor, Inter-Agency Mainland Affairs Committee, started functioning within the organizational scope of the Executive Yuan in August 1988, and coordinated policy decisions regarding mainland China⁸⁰. The decision to establish the agency followed an ease of restrictions on travelling of the ROC nationals to the mainland for family visits (1987), and expansion of economic, social and cultural interactions were not long in coming. Eventually, the Mainland Affairs Council has become a counterpart of the Taiwan Affairs Office.

As we see, the period when the MAC was established as an agency responsible for interactions with the mainland coincided with the time when importance of the NSC - another institution responsible for decision-making regarding the mainland in the ROC government - was on decrease. If we employ historical institutionalist theory for analysis of this dynamics, we have to refer to ideas that were relevant for the actors (Chiang Kai-shek and Lee Teng-hui) in the process of establishment of these institutions.

First, establishment of the NSC was part of Chiang's efforts to consolidate the political power around himself. During the process of establishment of this institution, the ROC regime was turned into a personalist autocracy. At that time, the main goal of the regime was to maintain an autocrat (Chiang Kai-shek) in power, and therefore all the threats had to be addressed, with the CCP being the main one. On the contrary, during the establishment of the MAC, the ROC regime was in a transitional stage from authoritarianism to democracy⁸¹. Hence, I argue that Lee was guided by idea of de-personalization of power, which is indispensable for democracy. This can also be evident from the complex processes that occurred in Taiwan during the transitional period (mainly localization of power and legalization of formation of new political parties), that culminated in the first direct presidential elections in 1996.

Second, attitude towards interactions with the regime on the mainland China (represented by the PRC) was fundamentally different. If for Chiang any communication with the CCP was dangerous, Lee in turn did not share this opinion. It is important to note here, that Lee had briefly participated in the CCP in 1946-1948⁸², so we can assume that his personal stance regarding the ROC relations with the communist party was more flexible than Chiang's. Indeed, Lee did not oppose to interactions with the Mainland in business, cultural and academic spheres, what demanded creation of an institution with broader expertise - and this is why the MAC came to existence. At the same time, reduce in tensions in Cross-strait relations and liberalization of trade between the mainland China and Taiwan were only possible with complementary economic reforms that occurred in Mainland at that time. Economic changes that have occurred in mainland China and Taiwan coincided in

⁷⁸ Rubinstein, M. A. (1998). *Taiwan: A new history. Political Taiwanization and pragmatic diplomacy. The eras of Chiang Ching-kuo and Lee Teng-hui, 1971-1994* (p. 466)

⁷⁹ 行政院 (Executive Yuan). (n.d.). Structure and Functions
<https://english.ey.gov.tw/Page/E43650B2CB14861B>

⁸⁰ Mainland Affairs Council. Republic of China (Taiwan). (n.d.) Organization and Function, About us
<https://www.mac.gov.tw/en/cp.aspx?n=33F7946C1005555F>

⁸¹ Maclay, J. D. (1997). *Taiwan's transition to democracy* (Research paper, pp. 21–26). Research Department, Air Command and Staff College.

⁸² Chi, C.-L. (2004). *Lee Teng-Hui's political cross-straits policy and Mainland China's reaction* (pp. 79–82). Faculty of Humanities, University of Pretoria.

time (late 1980-s) and were marked by establishment of new (or re-establishment of old) state institutions tasked with handling of Cross-strait affairs (the TALSG for the PRC and the MAC for the ROC) and adjustments of previously existing institutions (the TAO for the PRC and the NSC for the ROC⁸³).

At the same time, what aligns the NSC and the MAC, is strong reliance on the executive branch of power in the process of their formation. The president has direct control over the NSC, being its chairman, and has a strong influence on personnel recruitment of the MAC (the agency is subordinate to the Executive Yuan, and a head of the Executive Yuan - the Premier - is in turn appointed by the President). This personalized system of personnel recruitment and strong reliance on the executive branch of power in policy-making on Cross-strait affairs can be seen as historical legacy of personalist authoritarian system that still persists in the present. Another legacy that is inherited in the present is awareness of the existential threat that communism regime posits for the ROC. Potentially, the desire to both mitigate the risks affiliated with communist threat and to promote trade across the Straits can result in fluctuations in importance of the NSC and the MAC, depending on what is prioritized in a particular period of time.

⁸³ In 1988, the TAO was reformed as not only partisan, but also state institution subordinate to the State Council. This institutional adjustment allowed the agency to employ a broader array of tools, and act more openly representing the state, and not only the party
唐树备. (2017). 海峡两岸关系协会成立前后 [Before and after the establishment of the Association for Relations Across the Taiwan Straits]. *中共党史研究* [Research on the History of the Chinese Communist Party]

4. Methodology and Data

To identify key institutions responsible for handling of Cross-strait relations, the thesis relies on secondary qualitative method. In particular, academic literature on policy-making apparatus of the PRC and state institutions of the ROC was used alongside with databases on Cross-Strait and Sino-American relations (The Taiwan Policy Database and China Briefing). Statistical data sources were used in order to explore the dynamics in relations between the PRC, the ROC and the US. These sources include reports regularly published by state agencies (the MAC, the Ministry of Commerce of the PRC, the National Security Bureau of the ROC, the Department of Homeland Security of the US, the Ministry of Labour of the US), international organizations and institutions (the United Nations World Tourism Organization, World Travel Alliance), and databases maintained by institutes, think-tanks, and projects (Stockholm International Peace Research Institute. China Power Project, the American Enterprise Institute). Other information resources include online databases maintained by Statista, The Open Doors (for the data on international educational exchanges), and state-owned newspapers (China Daily for information on Federal Direct Investments in the PRC's economy).

In addition, an attempt is made to identify how the relations between the actors have been affected by political and professional characteristics of decision-makers. To address this, party affiliation of officials in the key institutions (for the US and the ROC) and their professional background (for the PRC) was tracked. In order to define these variables, academic literature, databases on Chinese politics (the China Data Lab), statistics gathered by the Congressional Research Service, and information published by responsible agencies (the Executive Yuan, the MAC, and the National Security Council for the ROC; the Department of State and the Department of Commerce for the US) have been used. Therefore, the power balance is examined both in democratic (the US and the ROC) and autocratic (the PRC) institutions. The gathered data is both qualitative (party affiliation and professional background of officials) and quantitative (the numbers on educational, professional, and political exchanges, economic interactions between the actors, and military activity), and hence indicate who and how have influenced the relations between the countries and citizens of these countries.

Although the data has been gathered thoroughly, possible shortcomings have to be acknowledged. Such concepts as "cooperation" and "coercion" are abstract in their nature, and in, order to measure them in the present thesis, certain limitations had to be imposed. If "cooperation" is understood as contribution to capital, people-to-people, and information exchanges, then the last domain out of these three is excluded from the thesis. Restrictions on the activity of online platforms, internet blockages and propaganda operations could be explored as a separate domain; however, due to considerations on feasibility of the research, they are not explored. Potentially, particular attention can also be paid to the ways how the ROC, the US, and the PRC handle global issues, and whether communication between them occurs. These issues might include Covid pandemia, global warming, and development of green technologies. However, detailed and responsible consideration is impossible within the framework of the current thesis.

In addition, the volume and dispersion of the handled data have become one of the most significant challenges in the process of thesis writing. State institutions can publish different numbers on a similar topic, what complicates the research on such a politicized issue. The statistics is provided in accordance with state institutions

specified in footnotes and bibliography, and discrepancies on important issues are elaborated, where possible.

5. Institutions and Officials in Charge of the Cross-Strait Relations

The previous chapter elaborated on ideas that were relevant during formation of the PRC and the ROC state institutions responsible for Cross-strait affairs. The present chapter focuses on two questions:

1. What are the key institutions in charge of the actors' policy-making on Cross-strait relations?
2. What changes have occurred in these institutions during the selected time period (2012-2024)?

The structure of the current chapter is as following: it starts from elaborating on the classification of the PRC's institutions, then proceeds to the ones of the ROC, and closes with the remarks on the institutions designed by the US.

5.1. The PRC

First, we need to understand clearly what are the key institutions in charge of the Mainland's policy on Taiwan. In order to do so, we need to take into consideration the dynamics in domestic politics that have been occurring in the PRC during the selected period. Second thing that might be helpful in pointing out such institutions and their roles is the policy-making decisions themselves - what have been the institutions issuing the policy documents, through which institutions have been proactive in the implementation of the Cross-strait relations policies, and what officials have designed the direction of the Mainland's policy on Taiwan?

In the research on the characteristics of the PRC's policy-making on Taiwan during the Xi Jinping's era, Madoka points out the importance of the leader's personal qualities in in the country's policy-making⁸⁴. Secondly, according to the research, the domestic trends in PRC's politics and internal affairs in the ROC are both important for the decision-making of the highest PRC officials. Thirdly, in comparison with the period of Hu Jintao's leadership, the involvement of the local institutions in the policy-making on Taiwan has increased. While taking into consideration the trends of centralization in the PRC's policy-making and the relative deterioration in the roles of policy administration organs, Madoka at the same time points at the continuing influence of such institutions, as the Taiwan Affairs Office and the Taiwan Affairs Leading Small Group.

Earlier, Michael D. Swaine created an explicit classification of the key decision-making actors in the PRC policy-making on Taiwan⁸⁵. In his classification, the actors divided on the basis of their role and function in the policy-making. Therefore, the institutions in charge of policy formulation and oversight, policy administration and implementation, policy coordination and supervision, and research and analysis are singled out⁸⁶. According to the provided classification, the Central Committee of the Communist Party of China had been the institution coordinating the

⁸⁴ Madoka, F. (2022). The characteristics of Xi Jinping's policy-making on Taiwan affairs: the conflict between institutionalization and centralization. *Journal of Contemporary East Asia Studies*, 11(2), 244–263. <https://doi.org/10.1080/24761028.2023.2177094>

⁸⁵ Swaine, M. D. (2001). Chinese decision-making regarding Taiwan, 1979–2000. In D. M. Lampton (Ed.), *The making of Chinese foreign and security policy in the era of reform* (pp. 289–336). Stanford University Press. . <https://doi.org/10.1515/9780804764490-013>

⁸⁶ 郭瑞華. (1996). 中共對台工作組織體系概論 [An overview of the CCP's organizational system for Taiwan affairs]. 法務部調查局共黨問題研究中心 [Chinese Communist Issues Research Center, Ministry of Justice Investigation Bureau]

subordinate state organization on policy formulation and oversight, policy administration and implementation, and research and analysis, while the function of policy coordination and supervision were split between the above-mentioned CCP CC and the PRC State Council.

The third source of data that can clarify the role and influence of different state institutions of the PRC in the country's policy-making on Taiwan is the Taiwan Policy Database website⁸⁷. By examining the policies issued by the PRC during the selected period, it becomes possible to understand, what governmental institutions have been the most important in formulation and implementation of the state policies.

The table created to classify the institutions responsible for the PRC's policy-making on Taiwan also ought to reflect the ongoing tendencies in domestic politics of China. Among such tendencies, the most relevant for the present research are persistent personalization of power and administrative centralization. Remaining the Party General Secretary, Xi Jinping has also been the head of such institutions as the CMC and the TALSG, and therefore has managed to exert his influence on decision-making far beyond conventional limitations of any other institution in the selected period, being it the PRC, the ROC, or the US institution in charge of Taiwan's policy. In addition, unlike any other institution examined in the current research, the position of the party general secretary has undergone no quantitative changes during the selected period (there have been no other general secretary). However, a significant qualitative change is lifting of the presidential terms. Unlike his predecessors, Xi Jinping managed to stay in power after his two terms (five years each) expired. Therefore, it is possible to point out a change in the regime nature itself: after abolition of presidential terms, the PRC has entered a period of power consolidation around Xi. This period started in 2018, when the National People's Congress abolished the presidential terms, and finished in 2022 at the 20th Party Congress, when Xi continued to the third term as the party general secretary. Since this period, the main goal of the regime existence has been not only to maintain in power the party, but also Xi Jinping himself. It is necessary to take into consideration this change of a regime nature when analyzing changes within the PRC institutions, since from that time loyalty to the party equates to allegiance to Xi.

With reliance on the classification of Chinese decision-making institutions regarding Taiwan by Michael D. Swaine, implications on Xi Jinping's policy making on Taiwan by Madoka, and the data collected by Taiwan Policy Database, other key institutions relevant for the research can be identified. Although these institutions are all in charge of the PRC's policy making on Taiwan, an attempt is made to place them in a hierarchical order, with their descending importance in the overall decision-making. Taking it all into consideration, the institutions singled out for the research will be placed in the following order:

1. The CMC. According to the Swaine's classification, this is one of the key institutions in terms of policy formulation and articulation. Taking into account the grown frequency of China's military activities attributed to Taiwan operations (in comparison to the Hu Jintao's era⁸⁸), we can assume that the role of the military institutions in the PRC's policy-making on Taiwan has also increased

⁸⁷ Center for China Analysis. (2024, July 31). *Taiwan policy database: Taiwan policy from World War II to present from the perspective of Taiwan, China, and the United States*. Asia Society Policy Institute" <https://asiasociety.org/policy-institute/taiwan-policy-database>.

⁸⁸ Saunders, P. C., & Scobell, A. (Eds.). (2015). *PLA influence on China's national security policymaking*. Stanford University Press. ProQuest Ebook Central.

2. The TALSG (the Taiwan Affairs Leading Small Group, also the Central Leading Group for Taiwan Affairs). Being one of the most important leading small group among all, the TALSG reports directly to the Party Politburo Standing Committee and the Party Secretariat. It is headed by Xi Jinping personally, and therefore might be able to cut through the existing hierarchies⁸⁹ - and this is why it is placed so high in the classification suggested in the present thesis. Although the TALSG is not present in the Taiwan Policy Database, it has a crucial role in policy coordination, policy-making and implementation⁹⁰. The institutional changes within the TALSG might indicate change of priorities in the CCP's decision-making on Taiwan, and therefore this administrative body should be included in the classification that will be used in the current thesis. This administrative body is also present in the Swaine's classification, and therefore has been systemically important for the PRC administrations.
3. The State Council. In addition to the highest position of this institution in policy coordination and supervision, and its detached position in the Swaine's classification, we can also refer to the Taiwan Policy Database. According to the Database, during the selected period (2012-2024) the State Council has issued the policy documents related to the Cross-strait developments in Fujian⁹¹ and development of Taiwanese business on the Mainland⁹².
4. The TAO (the Taiwan Affairs Office). According to the Taiwan Policy Database, the TAO has been the most proactive administrative institution of the PRC for pronouncements of the Taiwan-related policy documents. This institution is a counterpart of the ROC's Mainland Affairs Council that also plays a prominent role in policy-making on Cross-strait relations, and is subordinate to the TALSG in the Swaine's classification. Even though, according to Madoka's findings, the roles of the TAO and the TALSG have been on decline during the Xi Jinping era due to the lack of communication across the Taiwan straits, these institutions still cannot be left out due to their role in policy coordination (for the TALSG) and pronouncement (for the TAO). Thereby, it is reasonable to include both the TAO and the TALSG in the classification that is relevant for the present thesis

The data is provided in tables with the following template:

⁸⁹ Miller, A. (2017). *The CCP Central Committee's leading small groups*. *China Leadership Monitor*, (26).

⁹⁰ Hsiao, R. (2013, June). *Taiwan Work Leading Small Group under Xi Jinping*. *China Brief*, 13(12).

⁹¹ 中华人民共和国中央人民政府. (2023, September). *国务院关于支持福建探索海峡两岸融合发展新路 建设两岸融合发展示范区的意见* [State Council's opinion on supporting Fujian in exploring a new path for cross-strait integrated development and establishing a demonstration zone for integrated development across the Taiwan Strait]

⁹² 中华人民共和国中央人民政府. (2022, March). *台办 商务部 市场监管总局。关于做好台湾居民在服务贸易创新发展试点地区申请设立个体工商户工作的通知* [Notice by the Taiwan Affairs Office, Ministry of Commerce, and State Administration for Market Regulation on facilitating applications by Taiwan residents to establish individual businesses in pilot zones for innovative development of trade in services]

Table 1. Institutions in charge of the PRC's policy-making on Taiwan

The Party General Secretary (Xi Jinping himself)	
The Central Military Commission Name of an official - years in the office	The Taiwan Affairs Leading Small Group (The Central Leading Group for Taiwan Affairs) Name of an official - years in the office
The State Council Name of an official - years in the office	The Taiwan Affairs Office Name of an official - years in the office

The data gathered for the PRC institutions is broken down into three parts, and is represented in the three tables, accordingly for the years 2012-2017, 2017-2022, and 2022-2024. Unlike the ROC and the US, where the changes in the institutions are attributable to the changes of presidential administrations, while examining the institutions of the PRC we will refer to the changes after the Party Congresses. During the selected time, there have been convened the 18th, the 19th, and the 20th Party Congresses - therefore, the tables presented in this research are intended to reflect the changes occurred after these congresses. In examination of the institutions headed personally by Xi Jinping (the CMC and the TALSG), vice-chairmen and deputy leaders were selected for the present research. Previous offices are specified in italics. For the TALSG, the data is presented for the period since Xi Jinping took charge of the institution (since 2013). The positions taken by officials concurrently with the office of the TALSG deputy head are specified in italics. The data gathered for the Taiwan Affairs Office is also attributed to the period since 2013.

Table 1.1 After the 18th Party Congress (2012-2017)^{93,94,95,96,97}

Vice-chairmen of the Central Military Commission Xu Qiliang 许其亮 (2012/11/04 - 2023/03/11) <i>commander of PLA Air Force</i> Fan Changlong 范长龙 (2012/11/04 -	Deputy head of the Taiwan Affairs Leading Small Group Yu Zhengsheng 俞正声 (2013-2018) <i>chairman of the Chinese People's Political Consultative Conference</i>
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⁹³ Institute of Peace and Conflict Studies. (2012, December). *Contemporary China: CCP, army and the 18th Central Committee*

⁹⁴ Madoka, F. (2022). The characteristics of Xi Jinping's policy-making on Taiwan affairs: the conflict between institutionalization and centralization. *Journal of Contemporary East Asia Studies*, 11(2), 244–263

⁹⁵ Hsiao, R. (2013, June). *Taiwan Work Leading Small Group under Xi Jinping*. *China Brief*, 13(12)

⁹⁶ Hsiao, R. (2017, October). *Fortnightly review: Who will replace Taiwan Affairs Office Director Zhang Zhijun?* *Global Taiwan Brief*, 2(37)

⁹⁷ Shih, V. (2022, Summer). *The China Data Lab CCP Elite Portal*. UC San Diego.
<https://chinadatalab.ucsd.edu/elites/>

2017/10/25) <i>commander of the Jinan Military Region</i>	
Premier of the State Council Wen Jiabao 温家宝 (2003/03/16 - 2013/03/14) <i>Vice-premier of the State Council of China</i> Li Keqiang 李克强 (2013/03/15 - 2023/03/11) <i>Vice-premier of the State Council of China</i>	Director of The Taiwan Affairs Office Zhang Zhijun 张志军 (2013-2018) <i>Vice-minister of Foreign Affairs</i>

Table 1.2 After the 19th Party Congress (2017-2022)^{98,99,100,101}

Vice-chairmen of the Central Military Commission Xu Qiliang 许其亮 (2012/11/04 - 2023/03/11) <i>commander of PLA Air Force</i> Zhang Youxia 张又侠 (2017/10/25 - serving) <i>head of the Equipment Development Department of the CMC</i>	Deputy head of the Taiwan Affairs Leading Small Group Yu Zhengsheng 俞正声 (2013-2018) <i>chairman of the Chinese People's Political Consultative Conference</i> Wang Yang 汪洋 (2018-2022) <i>chairman of the Chinese People's Political Consultative Conference</i>
Premier of the State Council Li Keqiang 李克强 (2013/03/15 - 2023/03/11) <i>Vice-premier of the State Council of China</i>	Director of the Taiwan Affairs Office Zhang Zhijun 张志军 (2013-2018) <i>Vice-minister of Foreign Affairs</i> Liu Jieyi 刘结一 (2018-2022) <i>Permanent Representative of China to the United Nations</i>

⁹⁸ Bommakanti, K. (2018, January). *The 19th Congress of the Communist Party of China and its aftermath* (Observer Research Foundation Issue Brief). Observer Research Foundation

⁹⁹ Madoka, F. (2022). The characteristics of Xi Jinping's policy-making on Taiwan affairs: the conflict between institutionalization and centralization. *Journal of Contemporary East Asia Studies*, 11(2), 244–263

¹⁰⁰ Asia Society Policy Institute. (n.d.). *Decoding Chinese politics*
<https://asiasociety.org/policy-institute/decoding-chinese-politics?policy=taiwan-hongkong-macao&group=ancestryProvince&size=rank&connection=personal>

¹⁰¹ Shih, V. (2022, Summer). *The China Data Lab CCP Elite Portal*. UC San Diego.
<https://chinadatalab.ucsd.edu/elites/>

Table 1.3 After the 20th Party Congress (2022 -)^{102,103,104,105}

<p>Vice-chairmen of the Central Military Commission</p> <p>Xu Qiliang 许其亮 (2012/11/04 - 2023/03/11) <i>commander of PLA Air Force</i></p> <p>He Weidong 何卫东 (2023/03/11 - 2025/04/12) <i>Commander of the Eastern Theater Command</i></p> <p>Zhang Youxia 张又侠 (2017/10/25 - serving) <i>head of the Equipment Development Department of the CMC</i></p>	<p>Deputy head of the Taiwan Affairs Leading Small Group</p> <p>Wang Huning 王沪宁 (2022 - serving) <i>Chairman of the Chinese People's Political Consultative Conference (since March 2023)</i></p>
<p>Premier of the State Council</p> <p>Li Keqiang 李克强 (2013/03/15 - 2023/03/11) <i>Vice-premier of the State Council of China</i></p> <p>Li Qiang 李强 (2023/03/11 - serving) <i>Party Secretary of Shanghai</i></p>	<p>Director of the Taiwan Affairs Office</p> <p>Song Tao 宋涛 (2022 - serving) <i>Head of the International Department of the Chinese Communist Party</i></p>

A few conclusions can be made as a result of analysis of the presented tables. First, the officials appointed at the highest positions in the PRC hierarchy are likely to bring in expertise and practices relevant for their previous offices. It may lead to enhance in roles of their previously occupied institutions, strengthening in connections between their ex-institutions and the highest authorities, and intensification of previously utilized practices. For example, during Xu Qiliang's service as the CMC's vice-chairman, the PLA intrusions into the Air defense identification zone of neighbouring countries were routinized, and their intensity has also significantly increased. After 2018, such intrusions have also become one of coercive mechanisms among the PRC's policies towards Taiwan (see the Graph 4.3, page 55).

Second, personal qualities of the appointed officials and their commitment can lead to introduction of new policies. As such, after appointment of the leading CCP theoretician Wang Huning at the post of the TALSG Deputy Head, the party has introduced new tools of cooperation with Taiwanese individuals, therefore stepping up its United Front tactics. Among such measures, for example, recruitment of online

¹⁰² Dotson, J. (2024, January). *Wang Huning's first year supervising the United Front system: Taiwan policy and discourse*. *Global Taiwan Brief*, 9(1)

¹⁰³ Cole, J. M. (2023, January). *Veteran Chinese official Song Tao assumes the Taiwan portfolio*. *Global Taiwan Brief*, 8(1)

¹⁰⁴ Asia Society Policy Institute. (n.d.). *Decoding Chinese politics*
<https://asiasociety.org/policy-institute/decoding-chinese-politics?policy=taiwan-hongkong-macao&group=ancestryProvince&size=rank&connection=personal>

¹⁰⁵ Shih, V. (2022, Summer). *The China Data Lab CCP Elite Portal*. UC San Diego
<https://chinadatalab.ucsd.edu/elites/>

influencers, and sponsorship of their trips to China¹⁰⁶. Long-term consequences and progression in intensity of such measures are yet to be seen; however, it is already evident that the modern composition of the CCP leadership in charge of policy-making on Taiwan do not restrain from exerting its influence in the internet-media and social webs, what results in creation and introduction of new tools of attraction.

Third, appointment of Zhang Youxia as the CMC vice-chairman in 2017 (see the Table 1.2) may indicate a new prioritized sphere in the PLA tactics. Heading the PLA General Armaments Department in 2012-2016 and the CMC Equipment Development Department in 2016-2017, Zhang obtained significant expertise and qualification in obtaining and enhancing technologies necessary for modernization of the PLA. After the 19th Party Congress in 2017, modernization of the military was given even greater priority personally by Xi¹⁰⁷, and therefore Zhang's qualifications have become even more relevant. Therefore, new sophisticated forms of military coercive tactics utilized by the CCP can be expected. Many of these tactics will be framed as a part of cyberwarfare against the American and Taiwanese adversaries, so enhance in preparedness and joint response of both American and Taiwanese private and state entities can be expected. During Zhang's service as the CMC vice-chairman, the role of the Equipment Development Department of the CMC has also significantly increased. Among reforms conducted within the department, the system of public tenders was expanded, new operation mechanisms for research, review and supervision were created^{108,109}. The main goals of these reforms have been an improvement of public transparency, expansion of expert database and adjustment of the demands for defense innovation.

Four, the officials appointed at the highest positions in the CCP hierarchy cannot avoid the risks of purges. Moreover, it seems that not only signs of personal disloyalty, but also deviations within the subordinate department can lead to political downfall. As such, the absence of He Weidong, who is personally loyal to Xi, has been linked with prosecution of another CMC official (Miao Hua) and indicators of disloyalty within the PLA¹¹⁰. Purges have been routinized under Xi's leadership, but I would argue that ongoing purges within the CMC and the PLA cannot be attributed only to Xi's anti corruption campaign. Conversely, such purges, in combination with the PLA's ideological opposition to the main discourse, serve as a confirmation of a regime change - from 2018 on, the PRC is not only a party, but also a personalist autocracy. Therefore, these purges occur not just to fight with corruption within the

¹⁰⁶ Lee, Y. (2025, January 8). *Recruitment of online influencers reveals a new tactic of China's United Front*. *Global Taiwan Brief*, 10(1). Global Taiwan Institute

¹⁰⁷ Xi, J. (2017, October 18). *Secure a decisive victory in building a moderately prosperous society in all respects and strive for the great success of socialism with Chinese characteristics for a new era: Full text of Xi Jinping's report at 19th CPC National Congress*. *China Daily*. https://www.chinadaily.com.cn/china/19thcpcnationalcongress/2017-11/04/content_34115212.htm

¹⁰⁸中华人民共和国国防部 (Ministry of National Defense of the People's Republic of China). (2019, November 4). *军委装备发展部大力推进全军共用信息系统装备招标采购工作规范化运行* [The Equipment Development Department of the Central Military Commission vigorously promotes the standardization of bidding and procurement of common information system equipment for the entire army]. 新华社 [Xinhua News Agency]; 邱展招, & 杨欣
<http://www.mod.gov.cn/gfbw/qwfb/jwzbfzb/4854436.html>

¹⁰⁹ Chung, Y., & Dai, S. (2022). The Fourth Industrial Revolution and China's defense innovation in intelligent systems. *Korean Journal of Defense Analysis*, 34(2), 259–262

¹¹⁰ Tang, K. T. (2025, April 11). *He Weidong's possible downfall and Xi's trust deficit with the PLA*. *China Brief*, 25(7)
<https://jamestown.org/program/he-weidongs-possible-downfall-and-xis-trust-deficit-with-the-pla/>

CCP, but mostly to secure Xi's position as the party (and the state) leader, enhance his credibility and legitimacy.

5.2. The ROC

The ROC institutions in charge of the Cross-strait relations have been outlined by Mikael Mattlin¹¹¹. He places the institutions in the following order: the Presidential Office, the National Security Council, the cabinet (Executive Yuan), and the Mainland Affairs Council. So, for the present thesis it is important to analyze, how the party affiliation of the officials assuming the offices in these institutions have been correlating with changes in the ROC approach on the Question of Taiwan. This data is provided in tables with the following template:

Table 2. Institutions in charge of the ROC's policy-making on the mainland

The Presidential Office Name of an official (years in service) - party affiliation	The National Security Council Name of an official (years in service) - party affiliation
The Cabinet (Executive Yuan) Name of an official (years in service) - party affiliation	The Mainland Affairs Council Name of an official (years in service) - party affiliation

Table 2.1 Presidential term 2012-2016^{112,113,114}

<p>The President Ma Ying-Jeou 馬英九 (2008-2016) - the KMT</p>	<p>The NSC Secretary-General Hu Wei-chen 胡为真 (2010 - 2012/10/07) - the KMT Jason Yuan 袁健生 (2012/10/08-2014) - the KMT King Pu-tsung 金溥聰 (2014-2015) - the KMT Kao Hua-chu 高華柱 (2015-2016) - the KMT</p>
<p>The Premier (Executive Yuan) Sean C. Chen 陳冲 (2012/02/06-2013) - the KMT Jiang Yi-huah 江宜樺 (2013-2014) - the KMT Mao Chi-kuo 毛治國 (2014-2016) - the KMT Chang San-cheng 張善政 (2016/02/01 - 2016/05/20)* - Independent (the KMT after 2022)</p> <p>*2016/05/20 - Cai Ing-wen inaugurated as the President of the ROC</p>	<p>Minister of the Mainland Affairs Council Lai Shin-yuan 賴幸媛 (2008-2012/09/28) - Independent Wang Yu-chi 王郁琦 (2012/09/28-2015) - the KMT Andrew Hsia 夏立言 (2015-2016) - the KMT</p>

¹¹¹ Mattlin, M. (2011). *Politicized society: The long shadow of Taiwan's one-party legacy*. NIAS Press

¹¹² 中華民國總統府 (Office of the President, Republic of China). (n.d.). 國家安全會議: 長官簡介 [National Security Council: Leadership profile]

<https://www.president.gov.tw/nsc/management.html>

¹¹³ The Executive Yuan. (n.d.). *Premiers of the Republic of China*

<https://history.ey.gov.tw/en/directors/>

¹¹⁴ Mainland Affairs Council. (n.d.). *Officials: Minister*

<https://www.mac.gov.tw/en/cp.aspx?n=8CACDBAB80581C32>

Table 2.2 Presidential term 2016-2020

<p>The President Tsai Ing-wen 蔡英文 (2016-2024) - the DPP</p>	<p>The NSC Secretary-General Joseph Wu Jaushieh 吳釗燮 (2016/05/20 - 2017/05/21) - the DPP Chen Chun-lin 陳俊麟 (2017/05/22 - 2017/05/23) - the DPP (acting) Yen Teh-fa 嚴德發 (2017/05/24 - 2018) - Independent David Lee 李大維 (2018 - 2020/05/19) - the KMT</p>
<p>The Premier Lin Chuan 林全 (2016/05/20 - 2017) - Independent Lai Ching-te 賴清德 (2017 - 2019) - the DPP Su Tseng-chang 蘇貞昌 (2019-2023) - the DPP</p>	<p>Minister of the Mainland Affairs Council Katharine Chang 張小月 (2016/05/20 - 2018) - Independent Lin Cheng-yi 林正義 (2018/02/26 - 2018/03/19) - The PFP (People First Party) (acting) Chen Ming-tong 陳明通 (2018/03/19 - 2021) - the DPP</p>

Table 2.3 Presidential term 2020-2024

<p>The President Tsai Ing-wen 蔡英文 (2016-2024) - the DPP</p>	<p>The NSC Secretary-General Wellington Koo 顧立雄 (2020/05/20 - 2024/05/20) - the DPP</p>
<p>The Premier Su Tseng-chang 蘇貞昌 (2019-2023) - the DPP Chen Chien-jen 陳建仁 (2023 - 2024/05/20) - the DPP (Independent before 2022)</p>	<p>Minister of the Mainland Affairs Council Chen Ming-tong 陳明通 (2018/03/19 - 2021) - the DPP Chiu Tai-san 邱太三 (2021 - 2024/05/20) - the DPP</p>

As a result of analysis of the presented tables, a few conclusions can be suggested. First, it is evident that the policy-making system regarding affairs with the Mainland is a heavily partisan issue in the ROC. It can be seen as a direct consequence of strong reliance on the presidential credentials in this system. Among all the appointed officials, only six were not affiliated with the President's party (1 independent MAC Minister during Ma's presidential term, 3 independent officials, 1 PFP MAC Minister and 1 NSC Secretary General from the KMT during Tsai's first presidential term).

Second, rotational patterns have changed significantly during Tsai's second term (see Table 2,3). More precisely, changes can already be seen during her first term after 2018 (see Table 2.2). During this time, rotation has become much less active than before (only two officials have taken the position of the NSC Secretary General in 2018-2024 compared to seven in 2012-2018; only three officials have taken the office of the MAC Minister since March 2018 till 2024 compared to five in 2012-2018; significantly less rotation has occurred in the Executive Yuan), and officials' tenure has extended significantly. Another tendency that can be observed is

that non-DPP officials have been kept out of important offices during Tsai's second term.

How can these changes that have occurred since 2018 be explained? I would argue, that the explanation should be rooted not only in comparison of personal political preferences and ideals of Ma Ying-jeou and Tsai Ing-wen, but also in political changes that have occurred that year. Again, just as in the analysis of the data for the PRC, we have to talk about the change in regime nature of the PRC. It was as early as 2018 (not in 2022), when the PRC turned into a personalist autocracy; more precisely in March 2018, when the NPC adopted the law that eliminated Xi's presidential terms¹¹⁵. Quite curiously, around the adoption of this law, changes occurred in the ROC institutions directly in charge of Cross-strait relations: David Lee (the KMT) was appointed as the NSC Secretary General on 26th of February 2018 (a week before the law was published); the same day Lin Cheng-yi was appointed as the MAC Minister (although was substituted with Chen Ming-tong on the 19th of March, 2018). One may see this rotation as a reaction on the change in regime nature in the PRC; however, even we write this off as a coincidence, long-term consequences of the regime change in mainland China in a form of stronger partisanship of presidential allocations and decrease in rotation are evident. It can be argued, that due to consolidation of power around Xi in the PRC, the ROC President's trust in non-DPP parties has diminished, and in order to counter the growing assertiveness of the CCP the ROC President tries to avoid unnecessary rotation within the highest institutions in charge of Cross-strait affairs.

Here, an important should be made on the nature of the KMT and the DPP, historical legacies and developments of these two political parties. From the presented tables, it is evident, that by 2020-s handling of Cross-strait affairs has transferred from the KMT officials (who occupied the absolute majority of important positions in 2012-2016) to the DPP establishment. The KMT is the party that was formed in order to seize power in mainland China. Its political goals and political future are inextricably linked with the developments that occur in China. On the contrary, the DPP is the party that was formed in Taiwan, in order to capture political power in Taiwan, regardless of political developments in mainland China. These are the ideas that were relevant during the formation of these two political parties, and they are reflected in the very vision of Cross-strait relations of both the KMT and the DPP. For the KMT, cross-strait exchanges can be politically beneficial both in a short-term and long-term future, because these changes may be used as a tool to expand the KMT's influence on the mainland and its appeal to Chinese elites. For example, in long-term future an idea of a two-party KMT-CCP parliament with proscription of all other political parties (including the DPP) can be proposed by one of KMT (or CCP) theoreticians.

On the contrary, the DPP is politically indifferent to any kind of cross-strait contacts. Even the opposite - such contacts may threaten the security of the DPP as a political party, and consequently also the security of the ROC as a regime.

This difference in historical legacies that are relevant for the DPP and the KMT, coupled with heavy reliance on president's credentials which is evident in

¹¹⁵ 中华人民共和国全国人民代表大会. (2018, March 11). *中华人民共和国宪法修正案。2018 修正案（第五次）* [Amendment to the Constitution of the People's Republic of China: 2018 Amendment (Fifth Revision)]. 通过于第十三届全国人民代表大会第一次会议，人民大会堂 [Adopted at the First Session of the 13th National People's Congress, Great Hall of the People]. 发布于中华人民共和国人民代表大会公告，2018 年第 1 号 [Published in the Bulletin of the National People's Congress of the PRC, 2018, No. 1]. 有效期自 2018 年 3 月 11 日起 [Takes effect from March 11, 2018].

Taiwan's decision-making system on Cross-strait affairs, also leads to consequences for the political system itself. In circumstances when the elected president and parliamentary majority affiliated with differences parties, political struggle between the Executive and the Legislative branches of power may occur. Potentially, it can results in attempts to recall deputy mandates, presidential impeachments, and promotion of a rigid legislation on the national security. What is important in this situation for the ROC regime is not only to protect it from external threats, but also from reversion to autocracy.

5.3. The US

In order to outline the key institutions in charge of the US policy-making on Taiwan, the current paper relies on the Taiwan Policy Database gathered by the Asia Society Policy Institute¹¹⁶. The database would allow us to understand, what US institutions have been most proactive in formulation of the key policy documents in the country's relations with the ROC government and the PRC, and how the US approach towards Taiwan have been formulated. According to the database gathered by the Asia Society Policy Institute, the following US state institutions have participated in the country's policy-making on Taiwan during the selected period (2012-2024):

Table 3. Participation of the US State institutions in policy-making on Taiwan

INSTITUTION	AMOUNT OF ACTIONS	TYPE OF INVOLVEMENT
The American Institute in Taiwan	11	Accompaniment of officials during exchanges; bilateral agreements
The US Environmental Protection Agency	1	An exchange (official visit)
The Cabinet (Presidential Administration)	30	Arms sales
The President* (including the office of a president-elect)	3* (including 1 as a president elect)	Statements; A phone call* (* - as a president-elect)
City Mayor (Houston, San Jose, Sugar Land)	3	Exchanges (meetings with the ROC President)
The US Congress. The Senate Committee on Armed Services	1	An exchange (a meeting with the ROC President)
The US Congress. The Senate	4	Exchanges (meetings with the ROC President)
The US Congress. The House of Representatives	8	Exchanges (meetings with the ROC President)
Governor of State (Texas, Louisiana, New Mexico, Colorado) +Governor of an unincorporated territory (Guam)	5	Exchanges (meetings with the ROC President)
State Legislature (California) +Unincorporated territory	2	Exchanges (meetings with the ROC President)

¹¹⁶ Center for China Analysis, Asia Society Policy Institute. (2024, July 31). *Taiwan policy database: Taiwan policy from World War II to present from the perspective of Taiwan, China, and the United States*.

<https://asiasociety.org/policy-institute/taiwan-policy-database>.

legislature (Guam)		
Lieutenant-Governor of an unincorporated territory (Guam)	1	An exchange (meeting with the ROC President)
The US Congress. The US Senate Committee on Foreign Relations* (* - including the Subcommittee on Asia and the Pacific)	7* (including 1 of the Subcommittee on Asia and the Pacific)	Policy Documents; Exchanges (meetings with the ROC President)
The US Congress. The US House Committee on Foreign Affairs	4	Policy Documents; an exchange (a meeting with the ROC President)
The State Secretary of Economic Development (Louisiana)	1	An exchange (a meeting with the ROC President)
Texas Medical Innovation Institute	1	A visit of the ROC President
NASA Space Center	1	A visit of the ROC President
The Heritage Foundation	1	A meeting with the ROC President
The US Congress. The US Senate Taiwan Caucus	1	A meeting with the ROC President
The US Secretary of Health and Human Services	1	A meeting with the ROC President
The US Under Secretary of State for Economic Growth, Energy and the Environment	1	A meeting with the ROC President
The Department of State	2	Policy Documents
The US Congress. The US House Committee on Veterans' Affairs	1	A meeting with the ROC President
The US Congress. The US House Committee on Ways and Means	2	Meetings with the ROC President
The US Congress. The US House Intelligence Committee	1	A meeting with the ROC President
The US Congress. The US House Committee on Armed Services	1	A meeting with the ROC President
The US Congress. The US House Democratic Caucus	1	A meeting with the ROC President
The US Congress. The US House Select Committee on Strategic Competition	1	A meeting with the ROC President

Between the United States and the Chinese Communist Party		
The US Congress. The US House Committee on Appropriations	1	A Policy Document

As evident from the database, the US policy-making process has demonstrated great institutional complexity and diversity. Among the institutions that have participated in the policy-making process, there are those belonging to the executive (the President) and the legislative (the Congress) branches of power; the institutions of the federal (the President, the Congress, the Department of State) and the state (Governor of State, State Legislature). There is also an institution located outside of the US territory, and at the same time participating actively in the maintenance of the US-Taiwan relations - the American Institute in Taiwan.

However, it is noticeable that some institutions have exerted greater influence than the others. Among such institutions, we can identify the institutions of the federal level - the President (including the decisions on arms sale made by the Presidential Administration) and the Congress (including both chambers and different committees within the Congress). We can also single out, that the US Senate Committee on Foreign Relations has taken a great part in formulating the policy documents in the US-Taiwan relations.

Another institution that has to be singled out is the American Institute in Taiwan (the AIT). This is the only US institution that have signed bilateral agreements with the ROC authorities (the TECRO - the Taipei Economic and Cultural Representative Office in the United States) during the selected time. At the same time, the Chairman of the AIT have always participated in exchanges between the ROC and the US officials. Within the US State apparatus, the AIT is included in the organization of the US State Department, and reports information on Taiwan affairs to the authorities in Washington DC. Responsibilities of the AIT include giving advice regarding policy implementation, and advocacy for correct policy decisions on different issues to the relevant institutions. For example, on security concerns the AIT consults the US Department of Defense and the National Security Council. However, the AIT also functions as a de-facto overseas embassy of the US¹¹⁷. Therefore, even though the AIT does not take a supreme position in the hierarchy of the US State institutions, it provides necessary expertise and consultations on important policy matters, and is directly involved in the decision-making process. Regarding practical security issues, the AIT has taken a key role in coordination of resistance efforts with the ROC agencies against the CCP cyberattacks on Taiwan's infrastructure¹¹⁸. This is why the AIT has to be included in a classification of the institutions relevant for the present research.

At the same time, it is important to take into consideration the US state institutions in charge of its policy-making on China. For the present research, it is necessary to understand, what is the balance of power between the institutions in charge of policy-making on China and/or Taiwan, and if there are any overlaps in decision-making apparatus. Keeping in mind that the US-PRC relations is a vastly broad aspect of international relations, I would focus on a cooperative side of the US-

¹¹⁷ Moriarty, J. F. (2025, March 28). *My attitude towards the need of assurances* [Lecture, The University of Cambridge]

¹¹⁸ American Institute in Taiwan. (2022, March 18). *Integrated country strategy*.

China relations in the Biden era. Reliance on the database compiled by the China Briefing would allow me to understand, what state institutions have the US utilized in order to promote political exchanges and cooperation with China¹¹⁹.

Table 4. Participation of the US State institutions in cooperation with the PRC during the Biden era

INSTITUTION	AMOUNT OF ACTIONS	TYPE OF INVOLVEMENT
The President	15	Meetings, Statements, Phonecalls
The US Climate Envoy	7	Official visits
The US National Security Advisor	8	Meetings
The US Department of the Treasury	5	Issue of Executive orders, maintenance of the Specially Designated Nationals list, meetings of the Financial Working Group (in charge of cooperation on financial stability)
The US Secretary of the Treasury	6	Announcement of joint initiatives
The US Secretary of State	13	Meetings
The US Secretary of Defense	2	Meetings
Deputy Assistant Secretary of Defense for China, Taiwan and Mongolia	1	A meetings
The US Trade Representative	5	Modification of China tariffs
Chairman of the Joint Chiefs of Staff	1	A video call
The US Department of State	5	Publication of joint statements
The US Department of Agriculture	1	Participation at the China International Import Expo
Governor of State (California)	1	A meeting
The US Congress	1	A meeting
The US Secretary of Commerce (Including the US Commerce Department's Bureau of Industry and Security)	5	Meetings, publication of commitments
Former US Secretary of	2	Meetings

¹¹⁹ China Briefing. (2024, December 9). *US-China relations in the Biden era: A timeline*
<https://www.china-briefing.com/news/us-china-relations-in-the-biden-era-a-timeline/>

State (Henry Kissinger)		
White House National Security Council's senior director for China affairs	1	A meeting
The US Ambassador to the PRC	2	Meetings
Tesla CEO (Elon Musk)	1	A meeting
The US Department of Transport	1	Issue of an Order Regarding Chinese Carriers
The American Chamber of Commerce in China	1	A survey among American companies regarding their sentiments on business environment in China
The US Public Company Accounting Oversight Board	3	On-site inspections of accounting firms in mainland China and Hong Kong
The US Trade Commission	1	Announcement of tariff exceptions

After comparison of the institutions in charge of the US policy-making on China and Taiwan, there are several takeaways. First, we see little overlap between institutions participating in affairs with China and Taiwan - the only bodies have been the President, the US Congress, and a State Governor. Most likely, such division of responsibilities is done in order to facilitate the contacts with both the PRC and the ROC, since these two sides may painfully perceive contacts of the US administration with the adversary. Such division allows officials in charge not to be “contaminated” by contacts with a conflictual side, and therefore avoid unnecessary risks.

Second, unlike the state apparatus in charge of the policy-making on Taiwan (which mostly relies on a Legislative branch of power, and more precisely various committees of the US Congress), the majority of institutions responsible for contacts with the PRC belong to the Executive branch of power. This takeaway somehow aligns with an observation of Xin Qiang (Director of the Center for Taiwan Studies and Deputy Director of the Center for American Studies at Fudan University in Shanghai, China), who referred to the US Congress as more “pro-Taiwan” than the Executive branch of power in the US government¹²⁰. It would be incorrect to say that the US Congress is excluded from the Sino-American affairs; however, it is evident that its involvement into the US cooperation with China and Taiwan is greatly uneven.

Third, it is evident, which members of the Cabinet are mostly involved in communication with the PRC: the Secretary of State, the Secretary of Treasury, the Secretary of Commerce, and to a lesser extent the Secretary of Defense. It may indicate, that the rapprochement between the US and the PRC administrations, if possible, would be based on economic cooperation.

¹²⁰ Asia Society Policy Institute. (2025, March 28). *Taiwan policy under Trump 2.0: Changes on the horizon?* [Webinar]

Four, the importance that is assigned to the security matters in the US relations with China is evident in the activity of the US National Security Advisor. Moreover, on many events the National Advisor has been side by side with the Secretary of State. It may indicate especially close cooperation and collaboration of the National Security Council and the State Department on the security issues in Sino-American affairs.

Five, ex-state officials and private individuals that formally do not hold any political power also participate in exchanges between the US and the PRC (Henry Kissinger and Elon Musk). For the former, the same pattern can be observed in exchanges between the PRC and the ROC ex-officials (for example, Xi's meetings with the ROC former President Ma Ying-jeou in April 2024, and former Vice President Vincent Siew in October 2018). Such meetings may serve as a reference to desired relationship patterns, that existed between countries in the past, and revitalize previously relevant narratives. As for the latter, it can be said that popular and influential individuals might seek for opportunities to expand their business disregarding the responsible state agencies. In turn, autocrats, unconstrained with formal or legal arrangements and in need of popular and elite support, can provide such opportunities.

Six, intensive cooperation between the US and the PRC has been promoted through the US envoys (in case of the Biden administration - through the climate envoys). It becomes possible to assume, that the cooperation between the US and the PRC theoretically can be enhanced in less sensitive areas (such as climate changes) on the line of presidential envoys. Therefore, presidential appointments of envoys may serve as indicators of possible areas of cooperation between the US and the PRC even in the times when tensions are high.

Seven, it is evident, that members of the National Security Council of the US actively participate in the US-PRC exchanges. Among regular attendees of the NSC, only the Vice President did not participate in any contacts with the PRC officials during the Biden term¹²¹. Therefore, it becomes possible to assume, that the NSC is one of the key institutions that coordinate the US policy-making on China.

Even though the present thesis focuses on the Cross-strait relations (including the role of the US) and leaves the Sino-American relations at the background, they are impossible to be ignored entirely. Therefore, while conducting analysis of the data gathered for institutions in charge of the US policy-making on Taiwan, we also have to take into consideration the US' heavy reliance on Executive branch of power. This being said, if we mention the role of the Executive officials in the US' policy-making in East Asian region, it is important to mention the assistant secretary of state for East Asian and Pacific Affairs, who advises the Secretary of State and the under secretary for political affairs on the matters related to the region.

¹²¹The National Security Council is chaired by the President; its regular attendees include the Vice President, the Secretary of State, the Secretary of the Treasury, the Secretary of Defense, and the Assistant to the President for National Security Affairs (the National Security Advisor). Among other officials that participate in the NSC work and are present in the Table 4, there is Joint Chief of Staff, who serve as a statutory military advisor to the Council
The White House. (n.d.). *The National Security Council*. In President Barack Obama administration [https://obamawhitehouse.archives.gov/administration/eop/nsc/#:~:text=The%20National%20Security%20Council%20\(NSC,security%20advisors%20and%20cabinet%20officials](https://obamawhitehouse.archives.gov/administration/eop/nsc/#:~:text=The%20National%20Security%20Council%20(NSC,security%20advisors%20and%20cabinet%20officials).

Table 5. Important US officials in charge of the US policy-making on the PRC

The State Secretary Name of an official (years in service) - party affiliation	The National Security Advisor Name of an official (years in service) - party affiliation
The Secretary of Commerce Name of an official (years in service) - party affiliation	The Assistant Secretary of State for East Asian and Pacific Affairs Name of an official (years in service) - party affiliation

Table 5.1 Presidential term 2013-2017 (Obama's administration)^{122,123,124,125}

The State Secretary Hillary Clinton (January 21, 2009 - February 1, 2013), Democratic John Kerry (February 1, 2013 - January 20, 2017), Democratic	The National Security Advisor Thomas E. Donilon (October 8, 2010 - June 30, 2013), Democratic Susan Rice (July 1, 2013 - January 20, 2017), Democratic
The Secretary of Commerce Penny Pritzker (June 26, 2013 - January 20, 2017), Democratic	The Assistant Secretary of State for East Asian and Pacific Affairs Kurt M. Campbell (June 2, 2009 - February 8, 2013) Daniel R. Russell (July 12, 2013 - March 8, 2017)

Table 5.2 Presidential term 2017-2021 (Trump's administration)

The State Secretary Rex Tillerson (February 1, 2017 - March 31, 2018), Republican Mike Pompeo (April 26, 2018 - January 20, 2021)	The National Security Advisor Michael Flynn (22 January 2017 - 13 February 2017), Democratic (before 2021). Republican (after 2021) Herbert Raymond McMaster (February 20, 2017 - April 9, 2018) John Bolton (April 9, 2018 - September 10, 2019), Republican Robert C. O'Brien (September 18, 2019 - January 20, 2021), Republican
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¹²² U.S. Department of State, Office of the Historian. (n.d.). *Assistant secretaries of state for East Asian and Pacific affairs*

<https://history.state.gov/departmenthistory/people/principalofficers/assistant-secretary-for-east-asian-pacific-affairs>

¹²³ U.S. Department of Commerce. (n.d.). *Secretaries of commerce*

<https://www.commerce.gov/about/history/past-secretaries>

¹²⁴ Encyclopedia Britannica. (n.d.). *List of National Security Advisers of the U.S.: Names and dates*

<https://www.britannica.com/topic/list-of-national-security-advisers-of-the-United-States-1788874>

¹²⁵ U.S. Department of State, Office of the Historian. (n.d.). *Secretaries of state*

<https://history.state.gov/departmenthistory/people/principalofficers/secretary>

<p>The Secretary of Commerce Wilbur Ross (February 28, 2017 - January 20, 2021), Republican (since 2016), Democratic (before 2016)</p>	<p>The Assistant Secretary of State for East Asian and Pacific Affairs Daniel R. Russell (July 12, 2013 - March 8, 2017) Susan Thornton (March 9, 2017 - July 7, 2018) <i>acting</i> W. Patrick Murphy (July 2018 - June 2019) <i>acting</i> David R. Stilwell (June 20, 2019 - January 20, 2021)</p>
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Table 5.3 Presidential term 2021-2025 (Biden's administration)

<p>The State Secretary Antony Blinken (January 26, 2021 - January 20, 2025), Democratic</p>	<p>The National Security Advisor Jake Sullivan (January 20, 2021 - January 20, 2025), Democratic</p>
<p>The Secretary of Commerce Gina Raimondo (March 3, 2021 - January 20, 2025), Democratic</p>	<p>The Assistant Secretary of State for East Asian and Pacific Affairs Sung Kim (January 20, 2021 - June 4, 2021) <i>acting</i> Kin W. Moy (June 15, 2021 - September 24, 2021) <i>acting</i> Daniel Kritenbrink (September 24, 2021 - January 20, 2025)</p>

At last, based on the database by the Asia Society Policy Institute, it becomes possible to propose a classification of the key US institutions in charge of the country's policy-making on Taiwan. In the present thesis, party affiliation of officials and changes occurring in the following US institutions will be analyzed:

Table 6. Institutions in charge of the US policy-making on Taiwan

<p>The President Name of an official (years in service) - party affiliation</p>	<p>The United States Congress The party swing</p>
<p>The US Senate Committee on Foreign Relations Name of an official (years in service) - party affiliation</p>	<p>The American Institute in Taiwan Name of an official (years in service) - party affiliation</p>

Table 6.1 Presidential term 2013-2017

<p>Barack Obama (2009-2017) - Democratic The President</p>	<p>The 113th Congress (2013-2014)¹²⁶ The House of Representatives - 234 Republicans; 207 Democrats The Senate - 45 Republicans; 53 Democrats (+2 Independents, caucus with Democrats)</p> <p>The 114th Congress (2015-2016)¹²⁷ The House of Representatives - 248 Republicans; 192 Democrats The Senate - 54 Republicans; 44 Democrats (+2 Independents, caucus with Democrats)</p> <p>The 115th Congress (2017-2018)¹²⁸ The House of Representatives - 238 Republicans; 201 Democrats The Senate - 51 Republicans; 47 Democrats (+2 Independents, caucus with Democrats)</p> <p>The US Congress. The party swing</p>
<p>Bob Menendez (2013-2015) - Democratic Bob Corker (2015-2019) - Republican The Chair of the US Senate Committee on Foreign Relations</p>	<p>Raymond Burghardt (2006-2016) James Francis Moriarty (2016-2023) The Chairperson of the American Institute in Taiwan</p>

Table 6.2 Presidential term 2017-2021

<p>Donald Trump (2017-2021) - Republican The President</p>	<p>The 115th Congress (2017-2018)¹²⁹ The House of Representatives - 238 Republicans; 201 Democrats The Senate - 51 Republicans; 47 Democrats (+2 Independents, caucus with Democrats)</p> <p>The 116th Congress (2019-2020)¹³⁰ The House of Representatives - 237 Democrats; 197 Republicans; 2</p>
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¹²⁶Manning, J. E. (2014, November 24). *Membership of the 113th Congress: A profile* (Report No. R42964). Congressional Research Service
<https://sgp.fas.org/crs/misc/R42964.pdf>

¹²⁷ Manning, J. E. (2016, December 5). *Membership of the 114th Congress: A profile*.
<https://sgp.fas.org/crs/misc/R43869.pdf>

¹²⁸ Manning, J. E. (2018, December 20). *Membership of the 115th Congress: A profile* (Report No. R44762). Congressional Research Service
<https://sgp.fas.org/crs/misc/R44762.pdf>

¹²⁹ Manning, J. E. (2018, December 20). *Membership of the 115th Congress: A profile* (Report No. R44762). Congressional Research Service
<https://sgp.fas.org/crs/misc/R44762.pdf>

¹³⁰ Manning, J. E. (2020, December 17). *Membership of the 116th Congress: A profile* (Report No. R45583). Congressional Research Service.
<https://crsreports.congress.gov/product/pdf/R/R45583>

	<p>Independent/Libertarians The Senate - 52 Republicans; 46 Democrats (+2 Independents, caucus with Democrats)</p> <p>The 117th Congress (2021-2022)¹³¹ The House of Representatives - 222 Democrats; 215 Republicans The Senate - 50 Republicans; 47 Democrats (+3 Independents, caucus with Democrats)</p> <p>The US Congress. The party swing</p>
<p>Bob Corker (2015-2019) - Republican Jim Risch (2019-2021) - Republican The Chair of the US Senate Committee on Foreign Relations</p>	<p>James Francis Moriarty (2016-2023) The Chairperson of the American Institute in Taiwan</p>

Table 6.3 Presidential term 2021-2025

<p>Joseph Biden (2021-2025) - Democratic The President</p>	<p>The 117th Congress (2021-2022)¹³² The House of Representatives - 222 Democrats; 215 Republicans The Senate - 50 Republicans; 47 Democrats (+3 Independents, caucus with Democrats)</p> <p>The 118th Congress (2023-2024)¹³³ The House of Representatives - 220 Republicans; 212 Democrats The Senate - 49 Republicans; 47 Democrats (+4 Independents, caucus with Democrats)</p> <p>The US Congress. The party swing</p>
<p>Jim Risch (2019-2021) - Republican Bob Menendez (2021-2023) - Democratic Ben Cardin (2023-...) - Democratic The Chair of the US Senate Committee on Foreign Relations</p>	<p>James Francis Moriarty (2016-2023) Laura Rosenberger (2023-2025) The Chairperson of the American Institute in Taiwan</p>

¹³¹ Manning, J. E. (2022, December 14). *Membership of the 117th Congress: A profile* (Report No. R46705). Congressional Research Service.

<https://crsreports.congress.gov/product/pdf/R/R46705>

¹³² Manning, J. E. (2022, December 14). *Membership of the 117th Congress: A profile* (Report No. R46705). Congressional Research Service.

<https://crsreports.congress.gov/product/pdf/R/R46705>

¹³³ Manning, J. E. (2024, November 4). *Membership of the 118th Congress: A profile*. Congressional Research Service

<https://crsreports.congress.gov/product/pdf/R/R47470>

Discussion

As a result of this chapter, the key institutions in charge of the actors' policy-making have been singled out. In the research process, the classifications previously suggested by scholars (Michael Mattlin and Michael D. Swaine) were used alongside with the database on the Cross-strait policy decisions (The Taiwan Policy Database). The institutions suggested for the analysis in the present research include the Central Military Commission, the Taiwan Affairs Leading Small Group, the State Council, and the Taiwan Affairs Office - for the PRC; the President, the National Security Council, the Executive Yuan and the Mainland Affairs Council - for the ROC; the President, the Congress, the US Senate Committee on Foreign Relations, and the American Institute in Taiwan - for the US. In case of the US, key officials in charge of Sino-American relations are also taken into consideration (the State Secretary, the National Security Advisor, the Secretary of the State, and the Assistant Secretary of State for East Asian and Pacific Affairs).

2018 was marked as a year with significant political changes for all the PRC, the ROC, and the US. Moreover, changes came close in time. In China, Xi's presidential terms were abolished in March 2018; in the US, changes occurred in the Trump's administration - Mike Pompeo took the office of the Secretary of State in April 2018, John Bolton became a National Security Advisor (also in April 2018), and W. Patrick Murphy served as an Assistant Secretary of State for East Asian and Pacific Affairs since July 2018 till June 2019 (see Table 5.2). Changes in the US presidential administration that occurred in April 2018 overlapped with dynamics in the ROC institutions in February-March 2018. The next chapter will explore in detail how this rotation has influenced exchanges between the PRC, the ROC, and the US, but if we focus solely on rotation within the institutions, I would argue that the period February-April 2018 was pivotal.

Speaking more generally, decision-making systems of the ROC, the US and the PRC can be analyzed, and compared with regard to each other. While institutions of the PRC and the ROC are represented solely by Executive branch of power, among the US institutions those belonging to the Legislative branch also exert great influence on the policy-making process. In particular, the Taiwan Relations Act that has regulated relations between the US and the ROC, was enacted by the US Congress¹³⁴.

Further implications regarding division of priorities between the Legislative and the Executive branches of power can be observed in the US: if Executive institutions specialize on policy-making on the PRC, Legislative institutions provide expertise and specialize on Taiwan. Despite the existence of check and balances, the US political system still gives a significant priority to Executive institutions in general, and to the presidential office in particular. Therefore, it becomes possible to conclude, that the US prioritizes its relations with the PRC, and understands its relations with Taiwan not independently, but as a part of the strategy in relations with the PRC. In case of the ROC, reliance on the president's power in policy-making on Cross-strait affairs can be seen as a historical legacy of the authoritarian ROC regimes of the 20th century. In future, changes in balance between the MAC and the NSC are possible, depending on presidential preferences between deterrence and cooperation with the mainland. In addition, power struggle between the Executive and the Legislative authorities is possible, since the possibility is high that the Legislative Yuan will demand greater influence in Cross-strait affairs.

¹³⁴ Taiwan Relations Act, Pub. L. No. 96-8, 93 Stat. 14 (1979)

Particular attention should be paid to the rotation that occurs in the PRC's CMC. Among all considered PRC officials, only CMC Vice-Chairman He Weidong was prosecuted due to anti-corruption investigation. Another ongoing prosecution in the CMC, suspension of the CMC Political Work Department Director in November 2024, although not represented in the tables, but also should be taken into consideration. These purges can be linked to expression of disloyalty to Xi within the PLA, and indicate how sensitive Xi is to his personal legitimacy. Cases of He and Miao demonstrate, that to be personally loyal to Xi is not enough anymore - what is demanded now is loyalty from subordinates. It means, if subordinates demonstrate disloyalty - then their superior is held responsible. For the military elites, it may raise concerns regarding their personal security. In addition, we can see, that after 12 years of Xi's leadership, he still has problems with exerting sufficient control and influence over the PLA, what in turn raises questions, if high ranked PLA generals are loyal to him enough to conquer Taiwan militarily if necessary.

For rotation in the State Council of the PRC, a remark should be made regarding elevation of Li Qiang after the 20th Party Congress (see table 1.3). During the studied period, he has been the only Premier of the State Council who assumed the office bypassing a position of the Vice-premier. Moreover, he has become the first official who managed to do so since Zhao Ziyang (Premier of the State Council in 1980-1987, Vice-Chairman of the Chinese People's Political Consultative Conference in 1978-1983, and the Party Secretary of Sichuan in 1975-1980)¹³⁵. In Zhao's case, his elevation could be linked with implementation of economic reforms that stimulated revitalization of Sichuan province. It can be argued, that Zhao's profile was well-suited to the Deng's incentives carried out in 1980's, and therefore it became possible to appoint Zhao as a Premier despite the existing hierarchies. Employing historical institutionalism for analysis of Li's and Zhao's promotions, it is important to differentiate between political considerations of Deng Xiaoping and Xi Jinping. If Deng's primary goals were radical economic reform implementation and administrative decentralization, Xi, on the contrary, is guided with considerations of personalization of power. This difference defines the reasoning behind exceptional promotion of Zhao Ziyang and Li Qiang respectively. If in Zhao's case the main factor that had contributed to his promotion was economic revival of Sichuan province (and demonstrated expertise in economic issues), in Li's case it was tough handling of Covid-19 pandemic in Shanghai - criticized and controversial, but in line with Xi's Covid-zero approach (and demonstrated loyalty on this issue). In addition, personal connection between Xi and Li cannot be overlooked^{136,137}. Therefore, here we can observe that loyalty has become a credible foundation to break the existing succession orders.

Certain rotational patterns can also be observed for the Taiwan Affairs Leading Small Group and the Taiwan Affairs Office, since the leadership of these institutions have changed after every party congress. Every Deputy head of the Taiwan Affairs Leading Small Group have concurrently occupied the office of the Chairman of the Chinese People's Political Consultative Conference. Potentially, it

¹³⁵ United States Central Intelligence Agency, Directorate of Intelligence. (1982). *Zhao Ziyang: A political profile*

¹³⁶ Wu, G. (2023). Li Qiang Versus Cai Qi in the Xi Jinping Leadership: Checks and Balances with CCP Characteristics? *China Leadership Monitor*, Issue 77

¹³⁷ Li Qiang worked under Xi Jinping in 2004-2007 in Zhejiang province as a Chief of Staff in the Provincial Party Committee
Li, C., & Thornton, J. L. (n.d.). *20th Party Congress: Li Qiang*. Brookings Institution

can indicate close cooperation between these two institutions in Cross-strait policy-making.

For the ROC, there are slight differences that can be observed between the second presidential term of Ma Ying-jeou and the first term of Tsai Ing-wen. During both periods there have been active rotation within the state institutions, and both presidents have favored officials from the ruling party (the KMT and the DPP respectively). However, during the first Tsai's term, it was possible for the KMT and the PFP (the People's First Party) officials to reach the top positions in the studied institutions.

Radical changes in rotational patterns can be observed during the second presidential term of Tsai Ing-wen. The rotation of the officials at the studied institutions has almost stopped, and has become significantly more selective - only officials from the DPP could take the leading offices at the studied institutions. This indicates, that Cross-strait affairs has become significantly more partisan issue. In addition, consolidation of power around the DPP and deceleration in rotation on the leading roles can be traced as early as February-March 2018. It indicates, that this dynamics within the ROC institutions is linked with domestic political developments in the PRC.

For the US, although reliance on presidential credentials is evident, great political and institutional diversity in policy-making can also be observed. At every segment of the studied period, both parties have participated in the policy-making process on Taiwan, and rotational patterns have been quite stable. However, the presidential term of Donald Trump (2017-2021) has been the only segment, in which the position of the Chair of the US Senate Committee on Foreign Relations has been taken exclusively by the Republican officials. The dominance of Republicans can also be observed during the early years of Donald Trump's presidency (2017-2018), when the Republican party got the majority both at the Senate and the House of Representatives, and the Senator from the Republican party (Bob Corker) had also served as the Chair of the US Senate Committee on Foreign Relations. At the same time, while bi-partisanship decision making system has been maintained within the Legislative branch of power, the Executive institutions have been entirely taken by the party of a president who won the elections, regardless of whether it is Democratic or Republican candidate. This indicates, that institutions of the Executive branch of power are more likely to incline to power consolidation than to principles of proportionality. This inclination might result in assertive efforts to secure dominant position of a ruling party.

6. Instruments of Hard and Soft Influence

Previous chapters provided theoretical outline of the research, and reviewed personnel changes that have occurred within the institutions responsible for handling of Cross-straits affairs during the selected time period. The current chapter provides analysis on the influence of these changes on interactions between the PRC, the ROC, and the US. These interactions are conceptualized with reliance on the classification elaborated by Roger C. Liu¹³⁸. In the article, Liu does not only divide the policies promoted by the CCP towards Taiwan in dimensions of coercion-cooperation, but also divides the measures based on their intensity. For coercive measures, Liu highlights those of high intensity diplomatic and military tools (“sticks” - “military actions or threats, blockades and coercive policies in international politics”) and less bold and direct measures often affiliated with hybrid warfare (“needles” - “infiltration, sabotage and disinformation warfare”). As for cooperative measures, Liu divides them into direct economic benefits (“carrots” - “promised benefits or attraction based on positive values”) and people-to-people work (“nets” - “relationships, networks and United Front work; developing local collaborators”). As Liu states, this diverse framework demonstrates flexibility of the tools at the PRC’s disposal and coherence of its strategic goals.

It is important to note, that in its nature the conceptual framework suggested by Liu elaborates on elements of both coercion and cooperation. However, Roger C. Liu was not the first who emphasized the desire of a state entity to both persuade through influence and coerce through the use of brute or sophisticated force. In German, Max Weber introduced a broad terminological array dedicated to characterize governing systems and ruling styles. Among the terminology introduced by Weber there are such terms as *Herrschaft* (“domination”, “rulership”, “leadership”), *Macht* (“power”), *Authoritat* (“authority”), and *Legitimitat* (“legitimacy”)¹³⁹. Even though all forms of *Herrschaft* translation in English emphasize the coercive element of this concept, originally it is way broader and encompasses different means of rule, direction and command. Weber himself elaborated on different types of *Herrschaft* based on which source a ruler uses to legitimize his authority: *Legale Herrschaft* (Legal-rational authority/domination), *Traditionelle Herrschaft* (Traditional authority), and *Charismatische Herrschaft* (Charismatic authority)¹⁴⁰. For these types of authority, predominate sources of power are long-standing customs (for *Traditionelle Herrschaft*), leader’s personal qualities (*Charismatische Herrschaft*), and influence that resides in an institution and office, but not in a distinctive individual (*Legale Herrschaft*). While leaders may rely on one particular source of authority depending on a nature of the political system they operate within, in reality they try to combine all sources of authority in order to alleviate all risks to their legitimacy. For example, the PRC leaders have to refer to the long statesmanship tradition in China and portray themselves as successors of this tradition; their leadership is justified by the NPC election, and the removal of Xi’s presidential terms had to be justified through the legislature. The PRC presidents also possess a wide array of tools to portray themselves as charismatic leaders. The US and the ROC presidents, although relying on the power rested in offices, also appeal

¹³⁸ Liu, R. C. (2022). From “sticks” to “carrots” and “nets”, then to “needles”: The evolution of the CPC’s policy towards Taiwan. *China Report*, 58(1), 90–105

¹³⁹ Weber, M. (2019). *Economy and society: A new translation* (K. Tribe, Ed. & Trans.). Harvard University Press. (Original work published 1922)

¹⁴⁰ Weber, M. (2019). *Typen der Herrschaft* (A. Maurer, Ed.)

both to tradition (as successors of founding fathers and Sun Yat-sen) and to their individual features in their campaigns. The conceptual framework introduced and developed by Weber bear two important consequences for the thesis. First, in order to exert their rulership (*Herrschaft*), leaders have to utilize not only coercion, but also attraction. Second, to build upon their legitimacy, they have to portray themselves as legally valid rulers, who comply with tradition and possess necessary personal qualities to govern. Consequently, an assumption can be made, that if a ruler has a lack of any of these three sources of legitimacy, he will more heavily rely on two other sources. For example, if the decision to remove president's terms raises questions regarding his *Legale Herrschaft*, he would instead portray himself as a politician with unique personal qualities who acts in line with political customs, this way relying on his *Charismatische* and *Traditionelle Herrschaft*.

Antonio Gramsci also elaborated on the ways through which rulers exert their influence. In his conceptualization, a dominant group utilizes both coercion and masses' consent in order to exert its control and establish hegemony. In Gramscian perspective, a key role in this process is assigned to intellectuals, who serve as "deputies" of a dominant group, and facilitate its influence over political and social system^{141,142}. Gramsci saw the legal apparatus of a political system as a main tool to coerce those who do not consent actively and passively, and prestige as a main driving force behind consent. For the present thesis, Gramscian perspective can be relevant for several reasons. First, introduction of a "dominant group" concept helps to understand political dynamics that have been occurring in Taiwan and in Cross-strait relations. Indeed, what can be observed within the governing institutions of the ROC in 2012-2020 is a change of a dominant group, embodied in a transition of important positions from the KMT to the DPP. The two dominant groups represented by these two political parties have distinctive differences in political preferences, historical narratives, and identity affiliations. What is portrayed as prestigious is also different for both of these dominant groups: for example, if from the KMT prospective joint participation in cultural or political events with mainland China is seen as reputable, for the DPP, on the contrary, demonstration of the Taiwanese identity, cultural and political differentiation are things to be proud of. Second, we can observe utilization of both consensual and coercive tools by the dominant groups in order to influence citizens and elites and get their consent, both active and passive. For example, such measures as blacklisting of Taiwan independence supporters (by the CCP) and amendments to the ROC National Security Law that allowed to prosecute retired military personnel who involve into cooperation with the CCP (by the DPP) are legal tools used by dominant groups to coerce those who do not comply and refuse to be persuaded via non-coercive mechanisms.

Among those who elaborated on the sources of power and means that states use to achieve desirable outcomes was Joseph Nye. He distinguished hard power and soft power, and understood the former as states' ability to command and order to do what they want, while the latter is the one of co-optive nature, and make an other state want the same thing and act with the same interests¹⁴³. Among the tools of soft power, Nye emphasized such resources as culture, ideology, and institutions. In his opinion,

¹⁴¹ Gramsci, A. (1999). *Selections from the prison notebooks* (Q. Hoare & G. Nowell Smith, Eds. & Trans.). London: Lawrence & Wishart. (Original work published 1971)

¹⁴² D'Attoma, J. (2011). *Hegemony or dominance? A Gramscian analysis of US ascendancy* [Master's thesis, University of Missouri-St. Louis]

¹⁴³ Nye, J. S. (1990). Soft power. *Foreign Policy*, (80), 153–171
<https://doi.org/10.2307/1148580>.

soft power is equally important to hard power, since it allows a state to avoid costly use of the latter in order to achieve the desired outcomes. According to the Nye's prospective, a country that manages to promote its interests through cultural attraction, ideology, and international institutions will be more successful in its relations with counterparts than countries that fail to do so. This notion of soft power can be easily applied to both democracies and autocracies, and therefore is highly relevant for the present thesis. Both the US and the PRC strive to exert their influence on Taiwan through institutions of soft power. Such institutions that are at the PRC's disposal include promotion of affiliation to a great civilization (ideology), the myth of reunification inevitability, the United Front Work, and its cultural institutions abroad - such as the Belt and Road Initiative (that promotes international economic and infrastructural development) and Confucius Institute (promotes Chinese language learning). The importance of these institutions and cultural influence that is exerted through them compared to hard power should not be underestimated. Autocracies in general, and the PRC in particular, are well-aware of the efficiency of these mechanisms in globalization era when transfer of information and ideas has become smoother and faster than ever. For example, the desire to limit the efficiency of soft power tools of foreign actors and to increase the effect of its own tools abroad explains the PRC's appeal to both network sovereignty (domestically) and to freedom of speech (in Taiwan, Europe and the US). Competition and rivalry of global powers nowadays is not only a matter of brute force superiority, but primarily an ability to formulate attractive narratives and to evoke public appeal to a system of social, economic, and political values, such as Asian values, Liberal and Democratic values, American values, Confucius values etc. Indeed, this notion also goes in line with traditional Chinese philosophy, since "to fight and conquer in all your battles is not supreme excellence; supreme excellence consists in breaking the enemy's resistance without fighting"¹⁴⁴. In this century, ideas and information sources of power have become more influential than ever, and the ability to create ideas, to convert domestic notions into international messages, to control and process the flows of information determines a country's success, and I would argue that this notion is especially relevant to the relations in the triangle the US-the PRC-the ROC.

Combination of the notions offered by Weber, Gramsci, and Nye allows us to come to several conclusions. First, since persuasive tools are less costly than coercive ones, states will resort to use of hard power in cases when their soft power proves inefficient (or less efficient than the soft power applied by their adversary). Second, if a state increases its reliance on hard power mechanisms, it indicates inefficiency of its soft power tools (whether in a particular case or in general). Indeed, failure to persuade recipients of a message through soft power tools discredit both the tools and the one who transmits the message. Third, even though utilization of hard power tools is more costly, they should not be excluded entirely. On the contrary, if a dominant group fails to educate the elites, or a state is unable to persuade others and the situation threatens a ruler's (or dominant group's) legitimacy (*Herrschaft*), a group or a ruler is likely to resort to hard power tools. Of course, a state is highly unlikely to resort to the use of exclusively hard or soft power - why should it limit itself when there is such a wide array at its disposal - however, a balance and dynamics between

¹⁴⁴ Sun Tzu. (n.d.). *The art of war* (Original work: 孙子, 《兵法·谋攻篇》: “百战百胜, 非善之善者也; 不战而屈人之兵, 善之善者也”). Translated as: “To win one hundred victories in one hundred battles is not the acme of skill. To subdue the enemy without fighting is the acme of skill.”

these two indicate the efficiency of conveyed messages and credibility of promoted values.

As we see, Weber, Gramsci and Nye have recognized a desire to use both coercive and co-optive mechanisms to influence the behavior of a recipient. Roger C. Liu, in turn, has distinguished precise coercive and co-optive tools with regard to the PRC's policy on Taiwan, and conceptualized these tools as "sticks", "needles", "nets", and "carrots". I would argue that the framework suggested by Liu can be broadened and applied not only to the PRC, but also to the measures of the ROC and the US. These actors also employ various tools of different intensity, both coercive and co-optive, in relations with each other and with the PRC in order to achieve their strategic goals. In particular, arms sales from the US to Taiwan have served as a distinctive example of "sticks" applied by governments of the ROC and the US in their relations with the PRC.

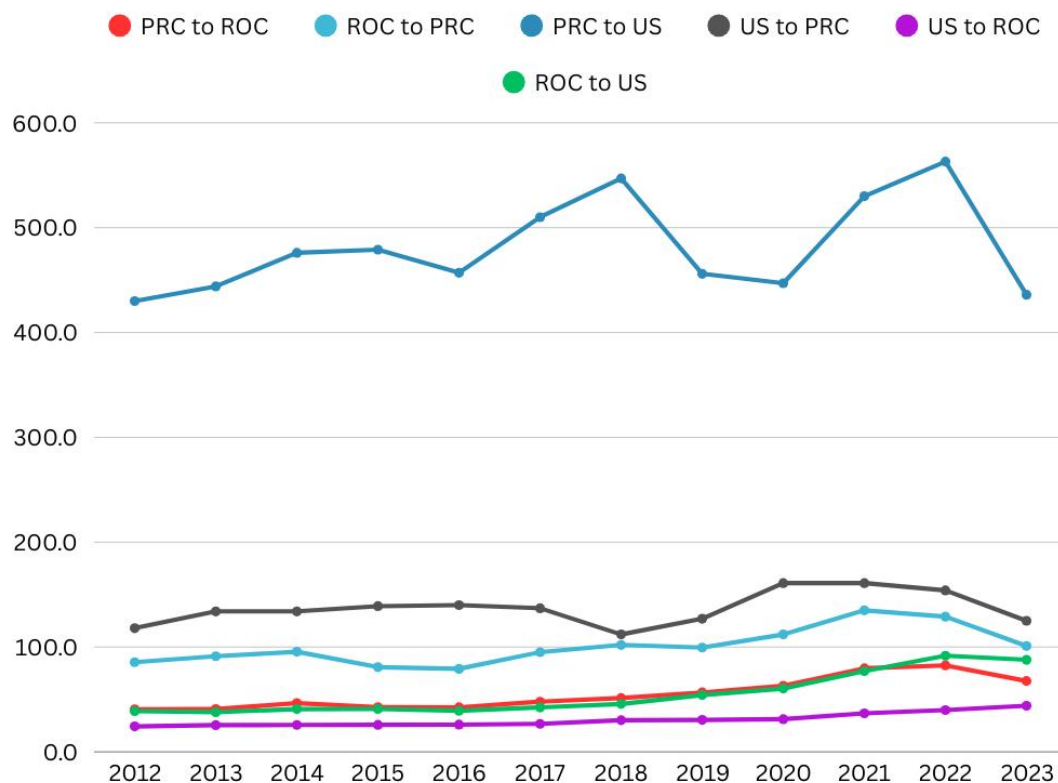
6.1. “Carrots” and “Nets”

First area that is examined in the relations between the ROC, the PRC and the US is economy (so-called “carrots”). The dynamics in economic interactions between these three states - the changes in imports and exports - are tracked during the selected period. In addition, statistics on the investment is also provided and included into the “carrots” domain.

Second area that is included in a scope of the analysis is people-to-people exchanges (the “nets”). In this area the datasets regarding people from mainland China visiting Taiwan and people from Taiwan visiting China are taken into consideration. A particular emphasis is put on educational exchanges.

Third area that is covered in the present research is influence operations, such as cyber attacks, espionage and infiltration (the “needles”). In turn, political engagement between the ROC and the US officials is analyzed framed as deterrent against the PRC, and hence is framed as the “needles” utilized by the governments of the ROC and the US. Military operations and drills, intrusions into the Air Defense Identification Zone (ADIZ) and arms procurement are framed as the “sticks”

Graph 1. Economic interactions between the PRC, the ROC, and the US (exports, billion dollars)^{145,146}



As it is evident from the graph, bilateral economic relations between the PRC and the US have been significantly more intensive than any other parts of the graph due to

¹⁴⁵ The Observatory of Economic Complexity. (n.d.). *OEC – The Observatory of Economic Complexity*
<https://oec.world/en>

¹⁴⁶ United States Census Bureau. (n.d.). *Foreign trade: Trade in goods with Taiwan*.
<https://www.census.gov/foreign-trade/balance/c5830.html#2022>

size of the economies. At the same time, these relations have been characterized with unstable periods of both growth (the PRC exports to the US in 2016-2018 and 2020-2022, the US exports to the PRC in 2018-2020) and decline (for the PRC exports - 2018-2020 and since 2022; for the US exports - 2017-2018 and since 2021). Prior to 2021-22, the ROC exports to the PRC and the US had been growing steadily; however, since 2022, economic cooperation between all parts has been on decrease. Judging from the graph, we can say that the war in Ukraine has influenced perceptions of each other in this triangle - appeals for decoupling and derisking have become louder and more influential, and it has become much more difficult to separate politics from economics. For the US-China relations, 2018-2020 was marked as a period in which the US have tried to correct its trade balance with China, to limit their imports from the PRC and enhance exports.

The next graph proceeds with representation of investment flows between the ROC and the PRC. Statistics for the PRC investments in the US is also gathered. What is important to note, is that the number of approved investments between the ROC and the ROC takes into account only flows from January to October, because of the way how data is published in the reports by the MAC.

Graph 1.2.1 Investment flows by year (the PRC's investments and construction projects in the US; data for the US investments in China for 2016 is from January to November, for 2012 - from January to September, as published by the PRC agencies - the Central People's Government and the Ministry of Commerce. Million dollars)^{147,148,149,150,151,152,153,154,155,156,157,158,159,160,161,162,163,164,165,166,167,168,169,170,171,172}

¹⁴⁷ American Enterprise Institute. (n.d.). *China Global Investment Tracker* (Data for the PRC's investments in the US)

<https://www.aei.org/china-tracker-home/>

¹⁴⁸ Mainland Affairs Council. (2013, February). *Cross-Strait Economic Statistics Monthly*, (No. 238)

¹⁴⁹ Mainland Affairs Council. (2014, February). *Cross-Strait Economic Statistics Monthly*, (No. 250)

¹⁵⁰ Mainland Affairs Council. (2015, February). *Cross-Strait Economic Statistics Monthly*, (No. 262)

¹⁵¹ Mainland Affairs Council. (2016, February). *Cross-Strait Economic Statistics Monthly*, (No. 274)

¹⁵² Mainland Affairs Council. (2017, February). *Cross-Strait Economic Statistics Monthly*, (No. 286)

¹⁵³ Mainland Affairs Council. (2018, February). *Cross-Strait Economic Statistics Monthly*, (No. 296)

¹⁵⁴ Mainland Affairs Council. (2019, February). *Cross-Strait Economic Statistics Monthly*, (No. 308)

¹⁵⁵ Mainland Affairs Council. (2020, February). *Cross-Strait Economic Statistics Monthly*, (No. 320)

¹⁵⁶ Mainland Affairs Council. (2021, February). *Cross-Strait Economic Statistics Monthly*, (No. 332)

¹⁵⁷ Mainland Affairs Council. (2022, February). *Cross-Strait Economic Statistics Monthly*, (No. 344)

¹⁵⁸ Mainland Affairs Council. (2023, February). *Cross-Strait Economic Statistics Monthly*, (No. 356)

¹⁵⁹ Mainland Affairs Council. (2024, February). *Cross-Strait Economic Statistics Monthly*, (No. 368)

¹⁶⁰ Mainland Affairs Council. (2025, February). *Cross-Strait Economic Statistics Monthly*, (No. 380)

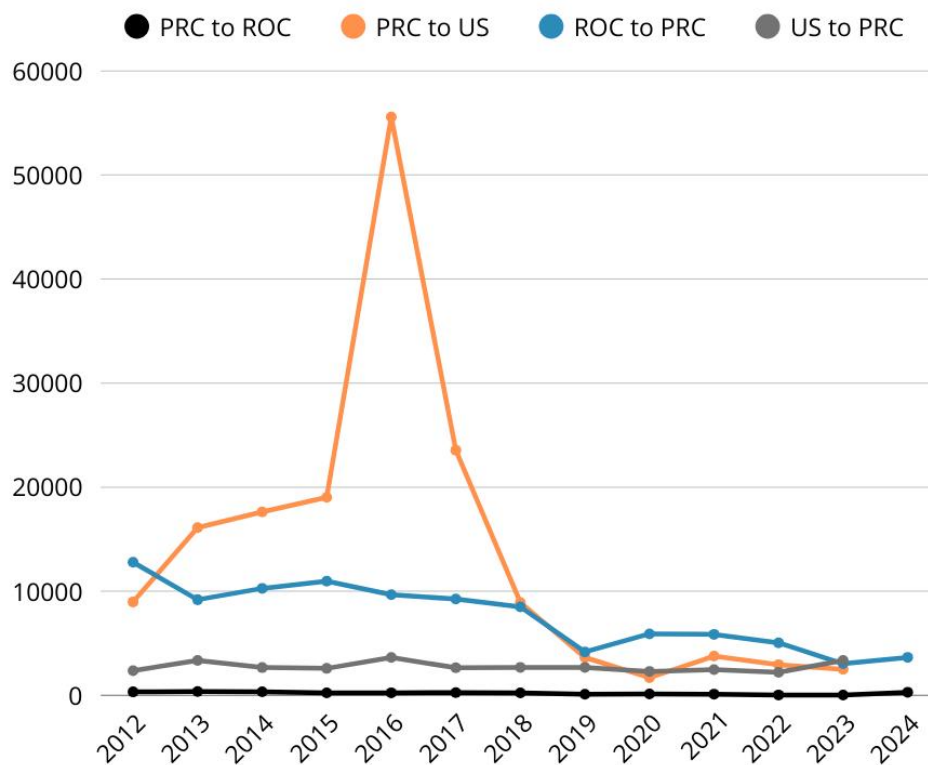
¹⁶¹ 中华人民共和国中央人民政府 (The Central People's Government of the People's Republic of China). (2012, October 19). *商务部发布会通报 2012 年 1-9 月我国商务运行情况 [MOFCOM press conference briefing on China's business operations from January to September 2012]*

¹⁶² China Briefing. (2014, January). *FDI in China springs back by 5.25 percent in 2013*

¹⁶³ 中华人民共和国商务部 (Ministry of Commerce of the People's Republic of China). (2015, January 23). *2014 年 1-12 月全国吸收外商直接投资情况 [National utilization of foreign direct investment from January to December 2014]*

¹⁶⁴ China Daily. (2016, February). *FDI 2015*
<https://govt.chinadaily.com.cn/s/201602/29/WS5f27b6ba498ed1e2f3408345/fdi-2015.html>

¹⁶⁵ 中华人民共和国商务部 (Ministry of Commerce of the People's Republic of China). (2016, December 29). *2016 年 1-11 月全国吸收外商直接投资情况 [National utilization of foreign direct investment from January to November 2016]*



The graph represents capital flows between the countries in the years from 2012 to 2024. As it is seen from the graph, investment flows from the US to mainland China and from mainland China to Taiwan have remained relatively low and stable, while the flows from the PRC to the US and from Taiwan to mainland China have been more significant and subjected to fluctuations. It is especially relevant for capital flows from China to the US.

The PRC, in general, does not invest in Taiwan. It can be explained by two reasons. First, direct investments are not seen as an effective economic tool by the PRC leadership; instead, it focuses on attraction of investments from Taiwan to mainland China. Second, legal framework of the ROC significantly limits opportunities for mainland Chinese investors due to security considerations.

¹⁶⁶ 中华人民共和国商务部 (Ministry of Commerce of the People's Republic of China). (2018). *中国外资统计公报 [Statistical bulletin of foreign direct investment in China]*

¹⁶⁷ 中华人民共和国商务部 (Ministry of Commerce of the People's Republic of China). (2019). *中国外资统计公报 [Statistical Bulletin of Foreign Direct Investment in China]*

¹⁶⁸ 中华人民共和国商务部 (Ministry of Commerce of the People's Republic of China). (2020). *中国外资统计公报 [Statistical Bulletin of Foreign Direct Investment in China]*

¹⁶⁹ 中华人民共和国商务部 (Ministry of Commerce of the People's Republic of China). (2021). *中国外资统计公报 [Statistical Bulletin of Foreign Direct Investment in China]*

¹⁷⁰ 中华人民共和国商务部 (Ministry of Commerce of the People's Republic of China). (2022). *中国外资统计公报 [Statistical Bulletin of Foreign Direct Investment in China]*

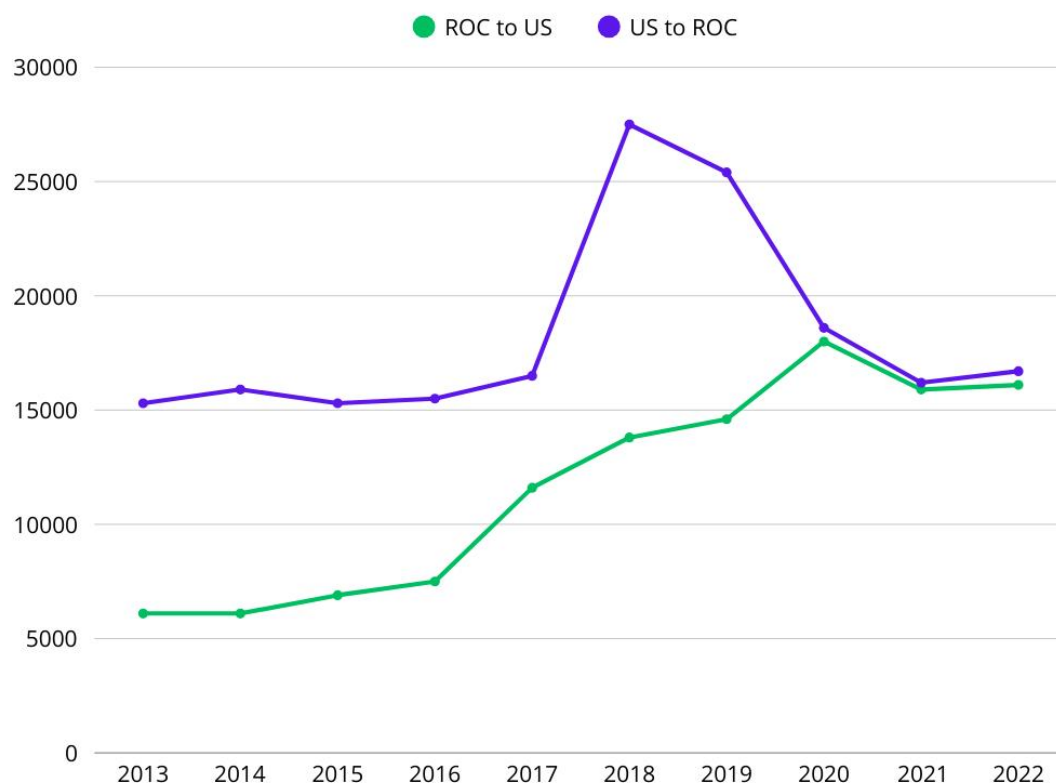
¹⁷¹ 中华人民共和国商务部 (Ministry of Commerce of the People's Republic of China). (2023). *中国外资统计公报 [Statistical Bulletin of Foreign Direct Investment in China]*

¹⁷² 中华人民共和国商务部 (Ministry of Commerce of the People's Republic of China). (2024). *中国外资统计公报 [Statistical Bulletin of Foreign Direct Investment in China]*

The PRC investments in the US economy peaked in 2016, and have been on sharp decline ever since. During the first Trump's tenure, Chinese investments were ruled out of the American economy. Although it can be said that Republican administration has taken a tougher stance on China (the dynamics in 2017-2020 looks significantly more dramatic than in years of Democratic administrations), it is evident that bi-partisan consensus has been reached that Chinese investments in the US economy should be screened and monitored with scrutiny, and attraction of investments is not a priority anymore.

Investments from the ROC to the mainland China, a traditional source of growth for the PRC economy, have been gradually on decrease since 2015. This trend coincides with rising political tensions between the PRC and the ROC, and indicates that China's leadership has been less successful in attraction of investments from Taiwan. The decline in Taiwan's investments into mainland China coincides with consecutive success of the DPP candidates on presidential elections, what may indicate raising awareness and concern for security of investments into the PRC economy.

Graph 1.2.2 The ROC FDI Stocks in the US and the US FDI Stocks in the ROC (Million dollars)¹⁷³

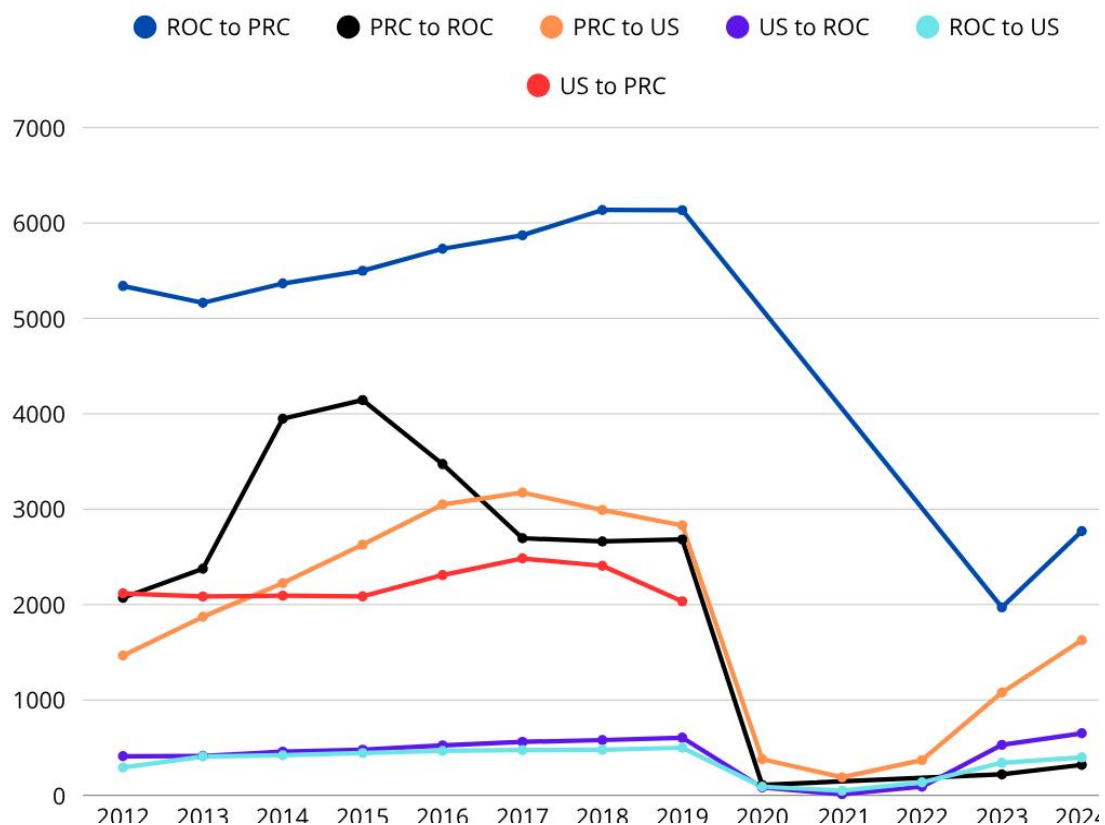


The US have been reluctant to invest into the Taiwan's economy since 2018. By the 2020-s, the US-Taiwan bilateral investments have equaled. On the contrary, investors from Taiwan are attracted by opportunities that the American economy provides to them. This enthusiasm had been especially high during the presidency of Donald Trump (2016-2020). However, pandemic has influenced the perceptions of

¹⁷³ Krulikowski, S., & Thome, K. (2024, July). *The United States–Taiwan trade and investment: Brief overview* (Executive Briefings on Trade). U.S. International Trade Commission

Taiwan's investors, and the rates of investment flows recovery remained low in 2021-2022. It becomes possible to assume, that the US tougher stance on China leads to rapprochement with Taiwan, which in turn raises enthusiasm of American investors regarding Taiwan's economic perspectives. At the same time, as for May 2025, this hypothesis has to be further tested against the US tariff policy. It becomes important to observe, how investment flows from the US to Taiwan will change if tariffs are imposed both on Taiwan and China, and whether these flows will change with developments in tariff policy.

Graph 2.1 Travel dynamics, x1000^{174,175,176,177,178,179,180}



Visitors from the PRC to the ROC is the group that has been affected the most by political developments and covid shocks. A rapid decline after 2015 was followed by covid decline, and the dynamics has still failed to recover. As a result, travelers from mainland China to Taiwan, from the 2nd biggest commuters group in 2012-2016 have turned into the least populous group in 2023-2024. Both the ROC and the PRC

¹⁷⁴ Mainland Affairs Council. (2014, December). *Cross-Strait Economic Statistics Monthly* (No. 248)

¹⁷⁵ UNWTO. (2023). *Yearbook of tourism statistics: Data 2017–2021 (China, pp. 231–237)*. World Tourism Organization

¹⁷⁶ World Tourism Alliance. (n.d.). *China inbound tourism development report* (United States, pp. 120–126)

¹⁷⁷ 交通部觀光署 [Tourism Administration, MOTC]. (n.d.). *觀光統計資料庫：歷年來臺旅客按居住地分 [Tourism statistics database: Visitor arrivals by residence]*

¹⁷⁸ Travel China Guide. (2012–2015). *Visitor data archive*

¹⁷⁹ Statista. (n.d.). *Number of visitors to the United States from Taiwan from 2011 to 2024*

<https://www.statista.com/statistics/1049038/inbound-travel-from-taiwan-to-the-us/>

¹⁸⁰ Mainland Affairs Council. (2025, March). *Cross-Strait Economic Statistics Monthly* (No. 383)

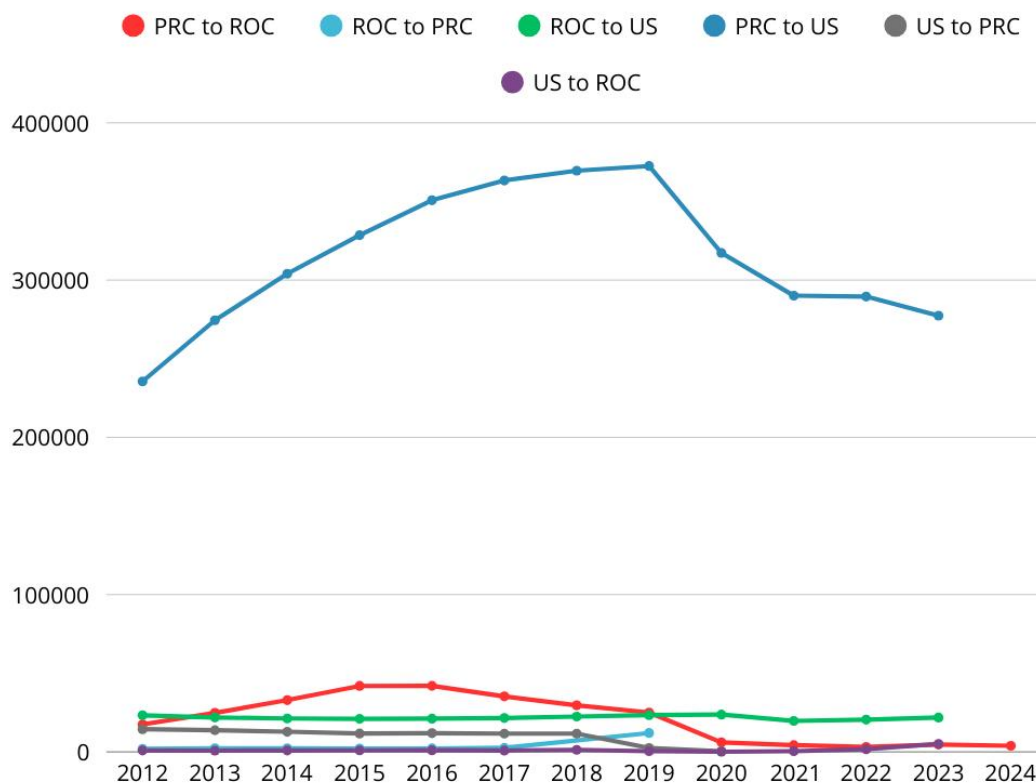
authorities accused each other in decline in amount of mainland Chinese tourists heading to Taiwan. On behalf of the ROC, the Mainland Affairs Council has stated that “Starting September 1, 2023, the government has resumed allowing mainland Chinese citizens residing or studying in third countries to visit Taiwan for tourism purposes”¹⁸¹. The MAC of the ROC also issued a response to a comment made by the Spokesperson of the PRC’s TAO regarding the resumption of mainland Chinese tourist visits in Taiwan, stating that the ROC government is open for resumption of tourist exchanges, but it expects opening and legal changes from the PRC side, and lifting of the law on “Judicial Guidelines on Imposing Criminal Punishment on Diehard Taiwan Independence Separatists”¹⁸². The PRC, in turn, blamed the DPP for deterioration of Cross-strait exchanges, and appealed to the hardships and difficulties that Taiwan’s tourism industry has to face with¹⁸³. From the PRC side, resumption of cooperation in various fields and personnel exchanges were named as conditions for expanding of mainland residents’ travel to Taiwan. In general, an assessment can be made, that resumption of mainland Chinese tourism trips to Taiwan is not in the interest of neither the PRC nor the ROC. For the PRC, it is more important to promote personnel exchanges and economic cooperation across the Straits; as for the ROC, it is satisfied with a situation in which only PRC citizens residing in third countries can visit the island, and prioritize the law that threatens security of the DPP supporters. Both for the PRC and the ROC expansion of tourist exchanges is not a matter to prioritize, and even on the contrary, a subject to control, monitor, and limit.

¹⁸¹ Mainland Affairs Council, Republic of China (Taiwan). (2024, November 26). *Cross-Strait tourism exchanges hindered by Mainland Chinese authorities: Government urges the industry to acknowledge the facts* (Press Release No. 063)

https://www.mac.gov.tw/en/News_Content.aspx?n=2BA0753CBE348412&sms=E828F60C4AFBAF90&s=CF4C2AECBE72E52F#:~:text=The%20government's%20position%20on%20welcoming,visit%20Taiwan%20for%20tourism%20purposes.

¹⁸² Mainland Affairs Council, Republic of China (Taiwan). (2024, December 18). *Explanation regarding the resumption of Mainland Chinese tourists travelling to Taiwan* (News Reference Material)

¹⁸³ 中共中央台湾工作办公室 & 国务院台湾事务办公室 [Taiwan Work Office of the CPC Central Committee & Taiwan Affairs Office of the State Council]. (2024, November 27). *国台办：民进党当局谋“独”挑衅造成台湾旅游业深陷困境 [TAO: DPP authorities’ provocative push for “independence” has plunged Taiwan’s tourism industry into crisis]*

Graph 2.2 Student exchanges^{184,185,186,187,188}

As it is evident from the graph, great asymmetry in the US-PRC and the PRC-US students' exchanges can be observed. While Chinese students have been actively studying in the US (although the amount of students has been on decrease since covid), American students demonstrate literally no interest in studying in China, and after the pandemic the amount of American students in China have been less than a 1000. This phenomena can be commented from two different points of view. On the one side, it demonstrates that the American model of education is still attractive for the Chinese youth, and students demonstrate great interest in learning and adopting

¹⁸⁴ Institute of International Education. (n.d.). *Open Doors Report on international educational exchange*

<https://opendoorsdata.org/>

¹⁸⁵ Statista. (n.d.). Number of college and university students from China in the United States from academic year 2013/14 to 2023/24

<https://www.statista.com/statistics/372900/number-of-chinese-students-that-study-in-the-us/>

¹⁸⁶ 國際及兩岸教育司 [Department of International and Cross-Strait Education]. (n.d.). *Number of Chinese students studying in the United States in each year*

¹⁸⁷ Mainland Affairs Council. (n.d.). *Mainland Chinese students in Taiwan: Statistics on mainland students researching and studying for degrees in Taiwan*. Republic of China (Taiwan)

https://www.mac.gov.tw/en/News_Content.aspx?n=CA7B5FA9C0EC7005&sms=D645444CA321A4FA&s=54D121541C911FB1

¹⁸⁸ 中央通訊社 [Central News Agency]. (2024, May). 赴中狂潮退 3 / 兩岸學生交流淪單向 中發禁令學位生大減 [The wave of studying in China has receded: Cross-strait student exchanges have become one-sided as China's ban leads to a sharp decline in degree-seeking students]

<https://www.cna.com.tw/news/acn/202405180019.aspx>

the ideas that circulate and appear in American universities. Speaking more specifically, American education is still attractive for Chinese political elites (Xi Jinping's daughter Xi Mingze has studied psychology in Harvard¹⁸⁹). This interest, and the knowledge gained by students after their education in the US, can become a driver not only for technical and economical developments, but also for social and political transformation in mainland China. On another side, if the US perceives its relations with China as a strategic rivalry, it risks to fall behind in expertise on the adversary in comparison to China. The lack of American expertise on China, its political and economic environment, can result in deterioration in positions of American enterprises operating in China, and more broadly in changes of strategic balance in politics and economy¹⁹⁰. Potentially, the lack of American expertise on China may enhance the risks of political and economic miscalculations in the Sino-American relations.

The amount of mainland Chinese students in Taiwan has been on decrease since 2016. This tendency is a result of limitations imposed by both the ROC and the PRC authorities. From the PRC side, the covid situation was used to ban Chinese students from enrolling to universities in Taiwan. From the ROC side, it was claimed that the PRC uses student exchanges as part of the United front tactics, and therefore Taiwanese institutions have to cooperate cautiously with universities in the mainland. Moreover, cooperation with Huaqiao University in Xiamen and Quanzhou, Jinan University in Guangzhou, and Beijing Chinese Language and Culture College was halted completely¹⁹¹. It is less likely that the economic and political model of the ROC will be seen as an alternative for Chinese students. In the end, it is evident, that choices made due to political considerations by both sides of the straits influence the choices of Chinese students willing to pursue their education in Taiwan: if in 2013-2019 it was one of the two most populous groups, in 2020s the amount of students has decreased drastically. The rapid decrease of Chinese students since 2019 has been relevant not only for Taiwan and the US, but also for a broader circle of countries that have geopolitical tensions with China. Among the countries that have tightened visa restrictions for Chinese students in sensitive fields (excluding the US¹⁹²) are the UK, Australia, and Canada. According to the Proclamation 10043, imposed limitations on entry of certain Chinese scholars, researchers and students are intended to counter China's "military-civil fusion" (军民融合) strategy.

¹⁸⁹ The Economic Times (2022, February 21). Xi Jinping's daughter Xi Mingze living in America, reveals US Senator Hartzler

https://m.economictimes.com/news/international/world-news/xi-jinpings-daughter-xi-mingze-living-in-america-reveals-us-senator-hartzler/amp_articleshow/89728856.cms

¹⁹⁰ 孙子. (n.d.). 兵法: 谋攻篇原文. "知彼知己, 百战不殆; 不知彼而知己, 一胜一负; 不知彼, 不知己, 每战必败" [Sun Tzu, *The Art of War*: "If you know the enemy and know yourself, you need not fear the result of a hundred battles. If you know yourself but not the enemy, for every victory gained you will also suffer a defeat. If you know neither the enemy nor yourself, you will succumb in every battle."]

¹⁹¹ Younger, H. (2025, February). China ignoring Taiwan's requests to discuss student exchanges: MAC. *Taipei Times*

<https://www.taipeitimes.com/News/taiwan/archives/2025/02/21/2003832274>

¹⁹² On May 2020, Proclamation 10043 was signed by President Trump. The Proclamation prohibited Chinese students, scholars and researchers affiliated with the PLA from obtaining non-immigrant visas Proclamation 10043 (2020, May). Suspension of Entry as Nonimmigrants of Certain Students and Researchers from the People's Republic of China

<https://trumpwhitehouse.archives.gov/presidential-actions/proclamation-suspension-entry-nonimmigrants-certain-students-researchers-peoples-republic-china/>

In addition, the China Initiative program by the Department of Justice (2018-2022) might also be a significant factor that contributed to decrease of Chinese students in the US¹⁹³. The program, aimed at countering economic espionage, has severely damaged American academic community, and resulted in brain drain of specialists in advanced fields from the United States. Specifically targeting researchers of Chinese origin, the China Initiative program can reasonably be considered as an expression of Sinophobia¹⁹⁴ and racism against Chinese¹⁹⁵. It becomes logical to assume, that since the US government has significantly disrupted the trust to itself from Chinese academic community, there is a considerable amount of students that would rather choose other destinations for their education - and these choices find their expression in continuous decline of Chinese students in the US since 2019. This decline is likely to continue during the second Trump's term, and tougher policies on Chinese economic espionage that might result in controversial persecutions can be expected.

Overall, the decrease in amount of overseas Chinese students that can be observed from the presented graphs are not unique for Taiwan and the US, but are a part of a bigger puzzle. As elaborated in a report by the Economic Intelligence Unit, this global decrease cannot be explained with a single factor, such as tightening of visa restrictions, ethnically-based persecutions in the academic community or covid consequences, but instead is a result of the variety of contributing factors. Among them are political (anti-espionage sentiment against students who have studied abroad in China, visa restrictions in Western countries), demographic (overall decrease in young population compared to previous years), professional (education abroad becomes not a positive, but a negative factor for networking back in China, and therefore students have less career opportunities), and educational (overall quality of Chinese universities has increased, and therefore local students have more opportunities to get top education without moving abroad)¹⁹⁶. On the other hand, these changes have led to increase in amount of Chinese students in Asian countries (such as Thailand and Malaysia). Potentially, if the EU successfully frames itself as an attractive destination for studying, it can also turn these changes into opportunities both for European countries in need of expertise, and for Chinese students seeking for opportunities abroad. Speaking more globally, if the EU manages to attract students who are unable to get education in other developed countries (such as the US, the UK, Canada or Australia), it will present itself as an attractive educational and political alternative, what in turn will significantly contribute to the EU-China relations. At the same time, necessary measures have to be applied in order to counter military espionage work under “military-civil fusion” strategy.

¹⁹³ U.S. Department of Justice. (2021, November 19). *Information about the Department of Justice's China Initiative and a compilation of China-related prosecutions since 2018*
<https://www.justice.gov/archives/nsd/information-about-department-justice-s-china-initiative-and-compilation-china-related>

¹⁹⁴ Eileen Guo, Jess Aloe, and Karen Hao (2021, December). The US Crackdown on Chinese economic espionage is a mess. We have the data to show it. MIT Technology Review
<https://www.technologyreview.com/2021/12/02/1040656/china-initiative-us-justice-department/>

¹⁹⁵ Joseph Choi (2021, June). Federal agents admit to falsely accusing Chinese professor of being a spy. The Hill
<https://thehill.com/regulation/court-battles/558345-federal-agents-admit-to-falsely-accusing-chinese-professor-of-being/>

¹⁹⁶ Economic Intelligence Unit (2024, July). In charts: the changing picture of China's outbound study
<https://www.eiu.com/n/in-charts-the-changing-picture-of-chinas-outbound-study/>

Focusing more specifically on the data itself, the Mainland Affairs Council had been publishing the statistics on students from Taiwan studying in mainland China till 2017, and the recent reports still had to rely on information from that time¹⁹⁷. Instead of publishing the data for the recent period, the MAC published an article “赴陸就學你不能不知道的 8 件事” (“8 Things you have to know before studying in mainland China”¹⁹⁸), citing the statistics from the Ministry of Education that only 400 high school graduates went to study in mainland China as for 2018. This number does not take into consideration exchange students (for example, in the statistics of mainland Chinese students in Taiwan these students constitute for 2/3 of the overall amount), master’s degree students, and those pursuing a PhD, hence leaving out of the statistics significant categories of students. In this situation of informational vacuum, a controversial situation has emerged, in which mainland Chinese officials claim that there are thousands of students from Taiwan studying in the Mainland, while the ROC officials refute these claims and insist that since 2018 the number of Taiwanese students in mainland China has been on decrease, and therefore no more than 400¹⁹⁹. Even though the data for students from the ROC in the PRC in 2018 that is presented on the graph 2.2 relies on the statements by mainland officials, I would approach it cautiously, since it is unclear what categories of students are included in this number, and if children from mixed marriages born and raised in the mainland China are excluded from this number. Nevertheless, conflicting aspirations in Cross-strait educational exchanges between the ROC and the PRC authorities are evident. While the ROC authorities underestimate publicized numbers and convince students to carefully consider their trips to the mainland for career development, the PRC authorities, in turn, overestimate the numbers and portray the mainland as an overly attractive destination for Taiwanese students. Both these assessments are dubious, since the number of 400 graduate students entering Mainland universities contribute to only 15% of the number of students included into 2017 statistics, and the number of 12000 students studying in mainland China would mean an almost 5 times increase in comparison with 2017 report. Both these developments are evenly unlikely, but they indicate the intentions of publishing agencies. For the PRC, the goal is to present mainland China as a place where Taiwanese youth seek to improve their career perspectives; for the ROC - to display that young Taiwanese people are not interested in educational opportunities provided in mainland China, and would rather stay in Taiwan or pursue their studies in other places. These deliberations and disputes between the state institutions also reflect politicization of education. If in the previous years a choice of where to study was a personal matter for every student, and depended on personal factors, now the two sides strive to present decrease (or increase) in the amount of students as their merit.

¹⁹⁷ 中評月刊. (2025, January). 兩岸青年學生教育交流現狀與進路 [China Review Monthly: Current situation and future directions of cross-strait youth student education exchange]

<https://hk.crntt.com/crn-webapp/mag/docDetail.jsp?coluid=0&docid=107031062&page=2>

¹⁹⁸ 中華民國大陸委員會 [Mainland Affairs Council, Republic of China - Taiwan]. (2023, August 7). 赴陸就學你不能不知道的 8 件事 [Eight things you must know about studying in mainland China].

¹⁹⁹ 中時新聞網 [China Times]. 赴陸求學熱度未減 兩岸敏感身分保低調 [The popularity of studying in China remains high, but individuals with sensitive cross-strait identities keep a low profile]

<https://www.chinatimes.com/newspapers/20230807000517-260303?chdtv>

Graph 2.3 Professional Migration (New Lawful Permanent Residents for those who moved from the PRC to the US, long term residents from mainland China in Taiwan) 200,201,202,203,204,205,206,207,208,209,210,211,212,213,214

²⁰⁰ 行政院主計處. (2022). 110 年國人赴海外工作人數統計結果。表 3 赴海外工作人數按國家（地區）別分 [Statistical results of Taiwanese working abroad in Year 110 (2021). Table 3: Number of Taiwanese working abroad by country/region]. 發布於 111 年 12 月 15 日 [Released December 15, 2022]

²⁰¹ 中華民國內政部移民署 [Ministry of the Interior National Immigration Agency, Republic of China – Taiwan]. (2012–2022). 統計資料。大陸地區人民進入臺灣地區。大陸地區人民、港澳居民、無戶籍國民來臺居留、定居人數統計表 [Statistical data: Number of Mainland China residents entering Taiwan, Hong Kong and Macau residents, and stateless nationals residing and settling in Taiwan]

²⁰² Ward, A. (2024, September). *U.S. lawful permanent residents: 2023*. Office of Homeland Security Statistics, U.S. Department of Homeland Security

²⁰³ Gibson, I. (2021, September). *U.S. lawful permanent residents: 2020*. U.S. Department of Homeland Security, Annual Flow Report

²⁰⁴ U.S. Department of Homeland Security, Office of Homeland Security Statistics. (n.d.). *Profiles on lawful permanent residents: China, People's Republic - Fiscal Years 2016-2017*

²⁰⁵ U.S. Department of Homeland Security, Office of Homeland Security Statistics. (n.d.). *Table 10. Persons obtaining lawful permanent resident status by broad class of admission and region and country of birth: Fiscal Year 2015*

²⁰⁶ U.S. Department of Homeland Security, Office of Homeland Security Statistics. (n.d.). *Table 10. Persons obtaining lawful permanent resident status by broad class of admission and region and country of birth: Fiscal Year 2014*

²⁰⁷ Monger, R., & Yankay, J. (2014, May). *U.S. lawful permanent residents: 2013*. U.S. Department of Homeland Security, Annual Flow Report.

²⁰⁸ 勞動部統計處 (Ministry of Labor, Department of Statistics). (2022). 勞動統計通報。111 年底外國專業人員概況 [Labor Statistics Bulletin: Overview of Foreign Professionals at the End of 2022]

²⁰⁹ 勞動部統計處 (Ministry of Labor, Department of Statistics). (2020). 勞動統計通報。109 年底外國專業人員概況 [Labor Statistics Bulletin: Overview of Foreign Professionals at the End of 2020]

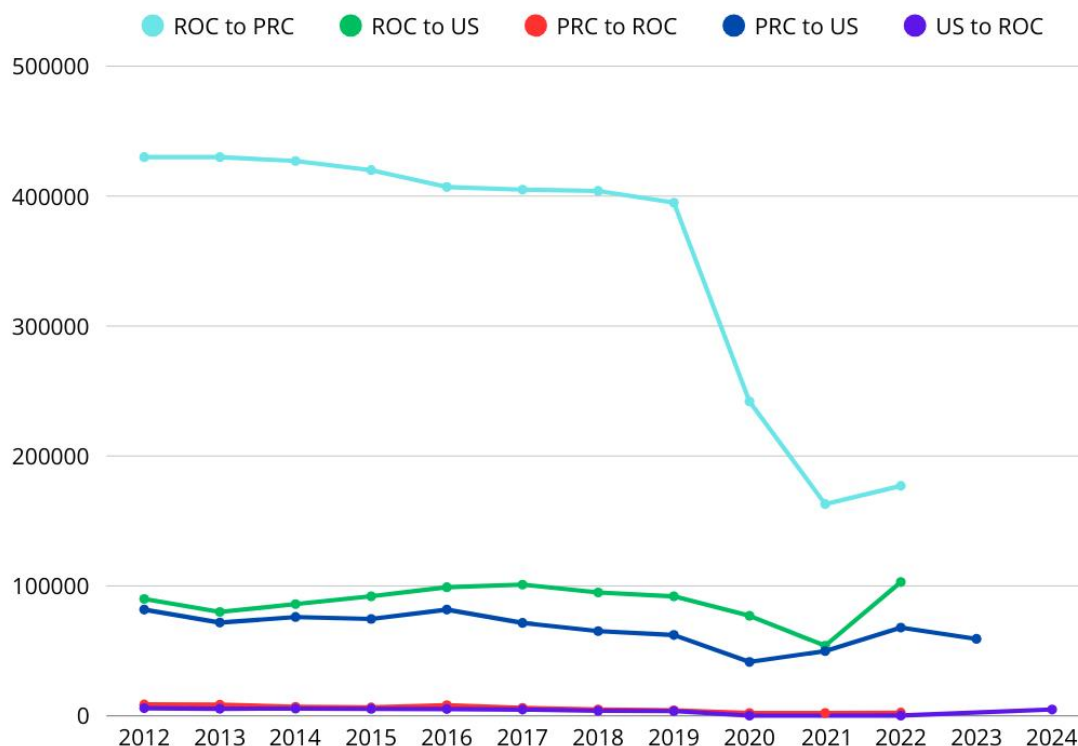
²¹⁰ 勞動部統計處 (Ministry of Labor, Department of Statistics). (2019). 勞動統計通報。108 年底外國專業人員概況 [Labor Statistics Bulletin: Overview of Foreign Professionals at the End of 2019]

²¹¹ 勞動部統計處 (Ministry of Labor, Department of Statistics). (2018). 勞動統計通報。107 年底外國專業人員概況 [Labor Statistics Bulletin: Overview of Foreign Professionals at the End of 2018]

²¹² 勞動部統計處 (Ministry of Labor, Department of Statistics). (2017). 勞動統計通報。106 年底外國專業人員概況 [Labor Statistics Bulletin: Overview of Foreign Professionals at the End of 2017]

²¹³ 勞動部統計處 (Ministry of Labor, Department of Statistics). (2016). 勞動統計通報。105 年底外國專業人員概況 [Labor Statistics Bulletin: Overview of Foreign Professionals at the End of 2016]

²¹⁴ 勞動部統計處 (Ministry of Labor, Department of Statistics). (2015). 勞動統計通報。104 年底外國專業人員概況 [Labor Statistics Bulletin: Overview of Foreign Professionals at the End of 2015]



During the first Trump's term, professional migration from both the ROC and the PRC were on decline. This decline can be attributable to the desire of governing presidential administration to change immigration patterns and initiatives to reduce immigration (including legal immigration). In particular, this desire has found its expression in the increased rate of H-1B visas denial²¹⁵ (foreign worker visas), and a failed attempt to pass the bill to eliminate the diversity immigrant visa category and to limit refugee admissions (the RAISE Act and resembling acts aimed at reducing immigration)^{216,217}. Most likely, immigrants from Taiwan and China had to face tighter restrictions on worker visas, and therefore the amount of people heading to the US in 2017-2021 has decreased - this trend is visible on the graph. Similar policies that aim to reduce immigration can be expected with the return of the Trump's administration. This trend of decline in migration flow in the US can be taken into consideration by countries in need of workforce - both regional and European powers. If necessary, this flow potentially can be redirected, and other countries may target and attract professional immigrants from Taiwan and mainland China. Professional immigration from Taiwan to mainland China has also been on decrease since 2012.

Besides political factors that have contributed to the decrease in migration, the covid effect is also visible. It has particularly influenced Taiwanese working in

²¹⁵ Ethan Baron and Leonardo Castaneda (2019, July). H-1B visa denial rates skyrocket under Trump. The Mercury News

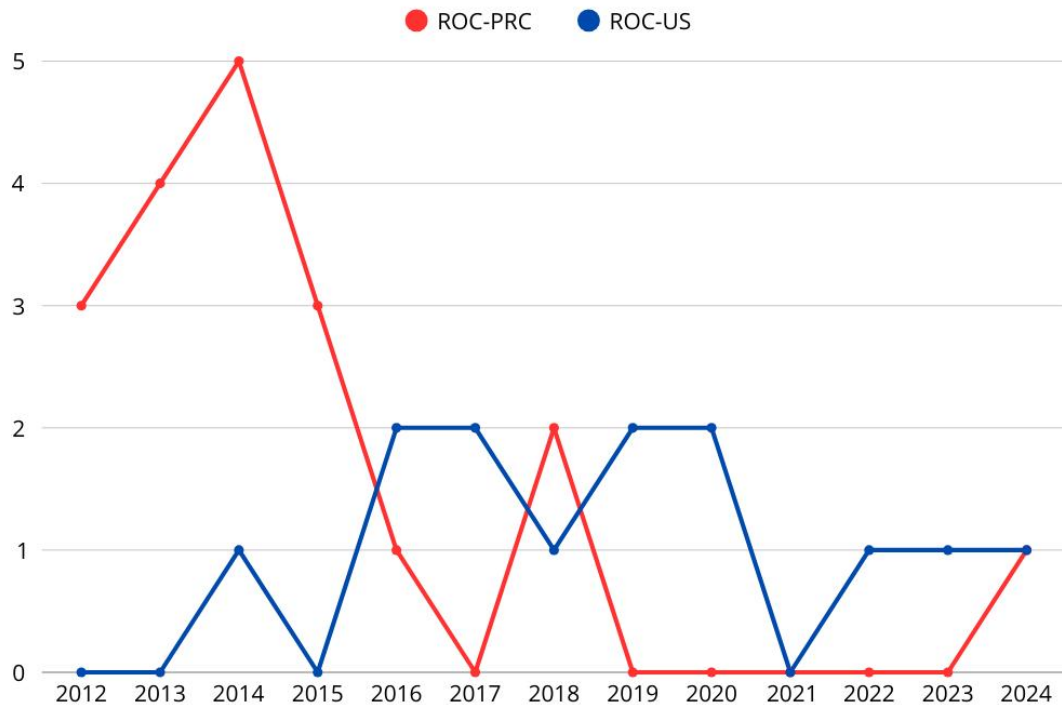
<https://www.mercurynews.com/2019/05/06/h-1b-visa-denial-rates-skyrocket-under-trump/>

²¹⁶ 115th Congress (2017, February). A Bill to amend the Immigration and Nationality Act to eliminate the Diversity Visa Program, to limit the President's discretion in setting the number of refugees admitted annually to the United States, to reduce the number of family-sponsored immigrants, to create a new nonimmigrant classification for the parents of adult United States citizens, and for other purposes

²¹⁷ 116th Congress (2019, April). RAISE Act

mainland China (rapid decline in 2020-2021 can be observed), and amplified decrease in professional migration from China and Taiwan to the US.

Graph 2.4 High-level Political Exchanges²¹⁸



After 2016, political exchanges between the PRC and the ROC have taken a form of interactions between mainland Chinese authorities, members of political opposition in Taiwan, and the ROC ex-presidents and premiers

In 2014-2018, the ROC establishment pursued contacts with both the PRC and the US authorities. After 2018, exchanges with the PRC have stopped. It is possible to assume, that years of 2018-2019 were marked as a time when the principle of “one country, two systems” had been discredited in the view of the ROC political establishment. Passing of the 2019 Extradition bill and severe crackdown on protests in Hong Kong have demonstrated the CCP’s intolerance to other types of political systems on the controlled territory, and Xi’s “continuismo”²¹⁹ as the paramount leader has eroded the existing succession patterns within the CCP that could be portrayed as “one country-two systems” framework. At the same time, exchanges between authorities of mainland China and Taiwan have been on sharp decline since 2014, the year with the highest amount of Cross-strait political exchanges. It can be said, that since then, Cross-strait exchanges have become a negative factor in the eyes of Taiwanese voters, and the ROC politicians had to be less proactive in demonstration of their ties with mainland China. Xi’s tougher stance on Taiwan, his bolder policy and statements compared to Hu administration have contributed to dissatisfaction with rapprochement between the ROC and the PRC politicians among Taiwanese public.

²¹⁸ Asia Society Policy Institute. (n.d.) Taiwan Policy Database
<https://asiasociety.org/policy-institute/taiwan-policy-database>

²¹⁹ A practice of maintaining a chief executive in office beyond his legal term

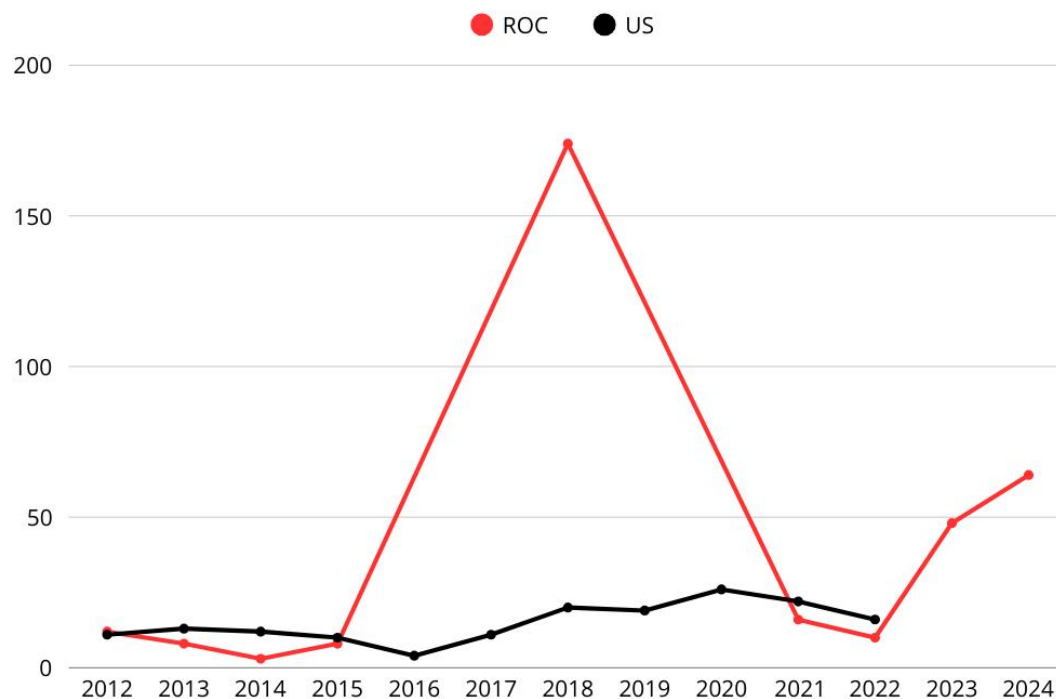
In particular, Xi's statement at the APEC forum in Indonesia regarding political resolution of the question of Taiwan that "can't wait forever" and should not be "passed on from generation to generation" might stir up dissatisfaction among both advocating for status-quo and independence in Taiwan²²⁰. This dissatisfaction culminated in the Sunflower Student Movement (March-April 2014), what marked the change in desirability of Cross-strait ties for a great number of Taiwanese voters.

²²⁰ Reuters (2013, October 6). China's Xi says political solution for Taiwan can't wait forever
<https://www.reuters.com/article/world/chinas-xi-says-political-solution-for-taiwan-cant-wait-forever-idUSBRE99503Q/>

6.2. “Needles” and “Sticks”

The following fragment elaborates on coercive instruments utilized by the PRC, the US and the ROC in relations with each other. The instruments that are analyzed in the thesis are conceptualized based on Roger C. Liu classification, and include espionage activities, armament build-up and military operations. Although statistics on grey-zone tactics (such as cyber operations or political persecutions) is not provided, it is taken into consideration, and analyzed in a broader context of other coercive tools. First, the statistics on the PRC espionage in the US and the ROC is provided.

Graph 3.1 Chinese Espionage Activities in Taiwan and the US. Agents of the PRC identified in the US and Taiwan^{221,222,223,224}



As visible from the graph, there was an increased number of Chinese espionage cases recorded in 2016-2020 in the US. Prior to 2016 and after 2020, the dynamics have been on decrease. It can be attributed to the intensified rivalry between the US and the PRC in the years of Republican administration, and it is likely that technological and political espionage had been more proactive than in years of Democratic administrations. At the same time, increase in the recorded amount of

²²¹ Major, D. (2016, June 9). Testimony before the U.S.-China Economic and Security Review Commission hearing on Chinese intelligence services and espionage operations

²²² 國家安全局 (National Security Bureau). (2025, January 12). 共諜案滲透手法分析 [Analysis on the infiltration tactics concerning China's espionage cases]

²²³ Center for Strategic and International Studies. (n.d.). Survey of Chinese Espionage in the United States Since 2000

<https://www.csis.org/programs/strategic-technologies-program/survey-chinese-espionage-united-states-2000>

²²⁴ Hsiao, R. (2020, December 2). *Global Taiwan Brief* (Vol. 5, Issue 23). Global Taiwan Institute, Fortnightly Review

espionage cases in 2018-2020 coincides with the period when the China Initiative program was carried out by the Department of Justice. Implementation of the program has raised questions both regarding its efficiency in intellectual property protection and compliance with human rights principles. Therefore, surge in the amount of Chinese espionage cases in these years in the US should be approached with consideration of domestic political initiatives carried out by the Trump's administration.

Proceeding with the surge in amount of Chinese espionage in Taiwan, legal instruments utilized by the ROC administration have to be examined. After the rise of espionage cases in Taiwan, the National Security Act was amended twice (in 2019 and 2022). The 2019 amendments focus on prevention of retired civil and military officials' participation in political events organized by the PRC²²⁵, and the 2022 provisions are designated to prevent economic and technological espionage by the PRC agents²²⁶. Both these amendments specify a circle of persons, whom they target: retired military personnel, civil servants, teachers, and employees of state-owned institutions. At the same time, other social categories of people are subjected to other legal frameworks, such as the Act Governing Relations Between Peoples Of The Taiwan Area And The Mainland Area²²⁷. Under provisions of this act, pro-mainland social media influencers advocating for unification have been deported²²⁸. The deportations have caused debates regarding freedom of speech and its limits between cultural figures and state agencies in Taiwan, and marked a new coercive tool that can be utilized by the ROC in Cross-strait relations.

In addition to the existing legislation, the act similar to the US' "Foreign Agents Registration Act" was drafted and submitted in the Legislative Yuan in October 2019²²⁹. Although the bill itself refers to experience of other democracies (the US FARA act of 1938 and Australia's Foreign Influence Transparency Scheme of 2018), it does not specify that the US FARA act has been amended in 1966 and 1995 to narrow down the scope of entities targeted by the act. In addition, the text of the bill proposed in the Legislative Yuan of the ROC does not mention a similar law that was enacted and has been actively enforced by Russian authorities - the so-called Russian foreign agent law²³⁰. First enforced to control the sources of funding and

²²⁵ 國防安全研究院 [Institute for National Defense and Security Research]. (2019, August 2). Security implications of Taiwan's five amendments to the national security laws
<https://indsr.org.tw/respublicationcon?uid=12&resid=715&pid=2654>

²²⁶ Taiwan International Patent and Law Office. (2022, September). Legislature approves amendment to National Security Act to protect national core technology
<https://www.tiplo.com.tw/en/tn/1441/47540>

²²⁷ Constitutional Court, R.O.C. (Taiwan). (1999, December). Interpretations No. 497
<https://cons.judicial.gov.tw/en/docdata.aspx?fid=100&id=310678>

²²⁸ Yip Wai Lee (2025, April 1). Chinese influencers forced to leave Taiwan after advocating "military unification". The Strait Times
<https://www.straitstimes.com/asia/east-asia/chinese-influencers-forced-to-leave-taiwan-after-advocating-military-unification>

²²⁹ 立法院議事暨公報資訊網. (n.d.). 境外勢力影響透明法草案 [Draft bill on the transparency of foreign influence]
<https://ppg.ly.gov.tw/ppg/bills/1100308070200300/details>

²³⁰ Российская Федерация. (2012, 20 июля). Федеральный закон №121-ФЗ «О внесении изменений в отдельные законодательные акты Российской Федерации в части регулирования деятельности некоторых некоммерческих организаций, выполняющих функции иностранного агента» [Federal Law No. 121-FZ of July 20, 2012, on amendments to certain legislative acts of the Russian Federation regarding the regulation of activities of certain non-profit organizations acting as foreign agents]
<http://publication.pravo.gov.ru/Document/View/0001201207230003>

activities of NGOs, the law was later broadened, and applied not only to organizations but also to individuals, imposing restrictions on their professional, political and educational activities. Currently, the law has taken a form of a tool for mass repressions, and the list of so-called “foreign agents” consists of both organizations (human rights groups, anti-corruption organizations, media etc.) and individuals (activists, politicians, political scientists, rappers, singers etc.). As of 21 April 2025, the list of Russian “foreign agents” consists of 973 entities²³¹. Similar register was published in Kazakhstan²³², and the similar laws have been approved by Georgia²³³, Kyrgyzstan²³⁴, and Hungary²³⁵ (although the Hungarian law was repealed and modified following the ruling of the European Court of Justice, a new version is still dubious and raises concerns within the Hungarian civil society, and legislative struggle around the issue has been ongoing^{236,237}). What unites these laws is that they are discriminatory in their nature, and impose limitations on citizens’ political and public activity. In case of Russia, the law has been used to consolidate political power around an autocrat (Vladimir Putin) by imposing of restrictions on political activity on his opponents. Although the bill drafted and submitted in the Legislative Yuan of the ROC has not been enacted yet, it is important to closely watch the developments that may occur in this direction. Enactment of this bill, or enforcement of similar legislation, might be a significant sign of consolidation of power around the ruling party in Taiwan. The law on foreign agents, as practice has demonstrated, has great potential to be broadened and enforced on broad circles of citizens, and political consequences for resilience of democracy in countries enacting such laws can be dangerous, since no country is secure from restoration of autocracy. Researchers and scholars with expertise in International Law also have to closely follow, what tools will the ROC government use to counter espionage threat posed by the PRC, and whether it will use this threat for enactment of discriminatory laws on foreign influence.

²³¹ Реестр иностранных агентов в России (Register of foreign agents in Russia, n.d.)
<https://gogov.ru/articles/inagency-21apr22>

²³² Комитет Государственных Доходов Министерства Финансов Республики Казахстан. (State Revenue Committee of the Ministry of Finance of Kazakhstan, n.d.). Реестр лиц, получающих деньги и (или) иное имущество от иностранных государств, международных и иностранных организаций, иностранцев, лиц без гражданства, подлежащих к опубликованию [Register of persons receiving money and/or other property from foreign states, international and foreign organizations, foreigners, stateless persons subject to publication]. Официальный Интернет-ресурс (Official Internet-resource)
<https://kgd.gov.kz/ru/content/reestr-lic-poluchayushchih-dengi-i-ili-inoe-imushchestvo-ot-inostrannyh-gosudarstv>

²³³ Anadolu Ajansı. (2024, May 16). *Georgia faces criticism from EU, NATO over controversial foreign agent law*
<https://www.aa.com.tr/en/europe/georgia-faces-criticism-from-eu-nato-over-controversial-foreign-agent-law/3220881>

²³⁴ Committee to Protect Journalists. (2024, March 15). *Kyrgyzstan parliament approves “foreign agents” law*
<https://cpj.org/2024/03/kyrgyzstan-parliament-approves-foreign-agents-law/>

²³⁵ Hungarian National Assembly. (2017). *Act LXXVI of 2017 on the transparency of organisations receiving support from abroad*. In force on June 28, 2017
<https://njt.hu/jogsabaly/en/2017-76-00-00>

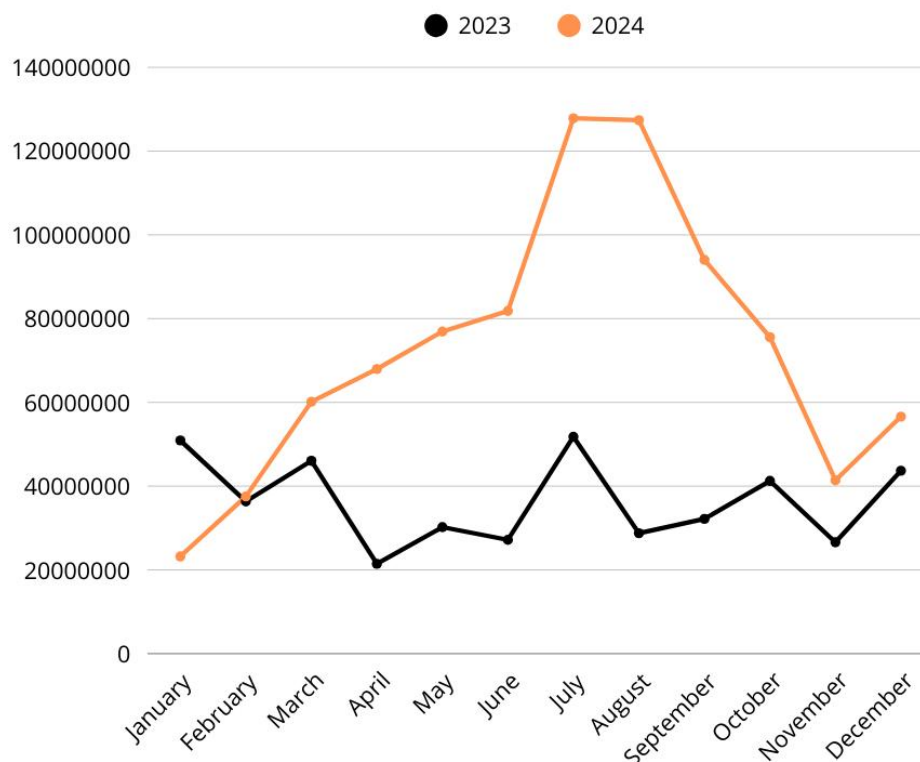
²³⁶ Euractiv. (2021, April 22). *Hungarian civil society raises alarm over NGO law change*
<https://www.euractiv.com/section/politics/news/hungarian-civil-society-raises-alarm-over-ngo-law-change/>

²³⁷ Euractiv. (2023, December 13). *Hungary passes contested laws against foreign influence*
<https://www.euractiv.com/section/politics/news/hungary-passes-contested-laws-against-foreign-influence/>

At the same time, Chinese infiltration is not limited with espionage, and includes other grey-zone tactics. An array of the PRC grey-zone activities has included coast guard activities in the disputed waters of the Taiwan Strait²³⁸. It is likely that such grey-zone activities serve a broader purpose than mere intimidation and provocations; instead, they stir up tensions in the Cross-strait relations and normalize the Status-quo on a new level of coercion. Eventually, intensifying grey-zone operations with involvement of civilians (or “civilians”) can lead to a kinetic conflict in the disputed areas in particular, or over the island in general.

Another important domain of the PRC grey-zone activities is cyber operations. In recent years, there have been recorded an increased amount of such activities. For example, in a period from 2023 to 2024, the National Security Bureau (NSB) has registered a double increase in the PRC cyber operations targeting Taiwan (from 1.2 million a day to 2.4 million a day)²³⁹. According to the data by the NSB, monthly amount of cybersecurity threats amount to tens and hundreds (in July and August of 2024) of millions.

Graph 3.2 ROC cyber threats in 2023-2024 monthly (the data by the ROC NSB)



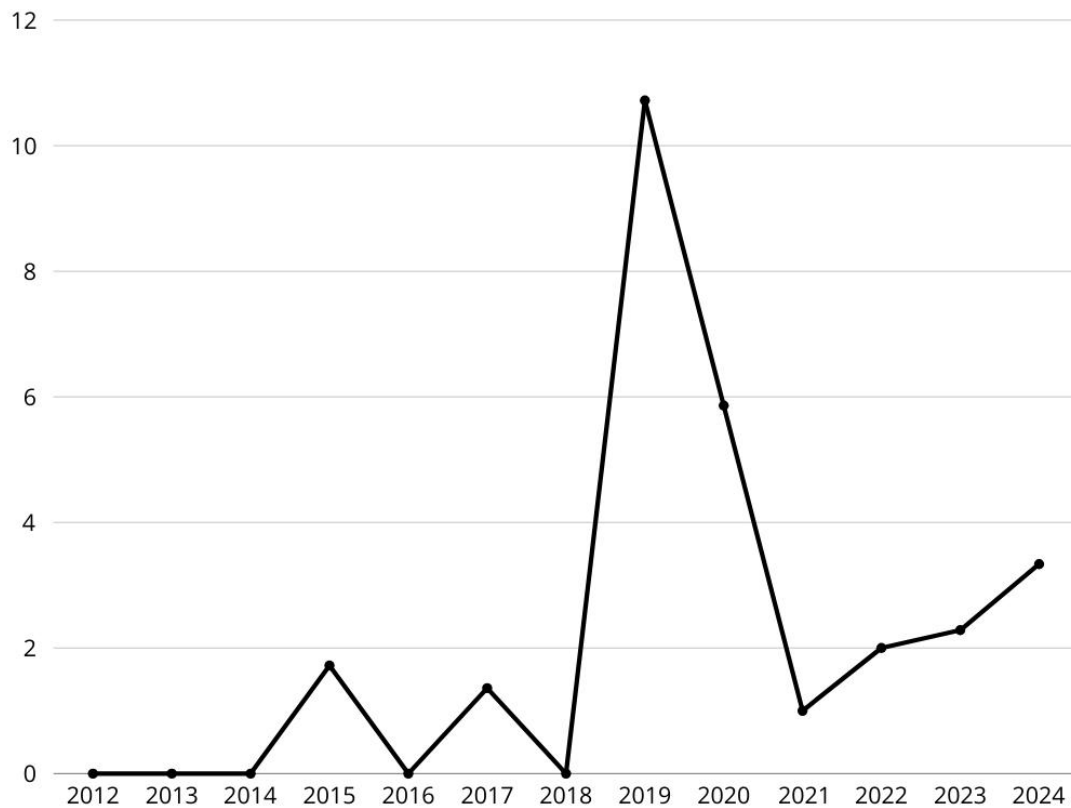
The main targets of China’s cyber operations have been dissemination of propaganda narratives, disruption of transport infrastructure, and national defence supply chains. In this situation, it becomes crucial for the ROC to adequately address

²³⁸ Sze-Fung Lee (2024, March 20). Decoding Beijing’s Gray Zone Tactics: China Coast Guard Activities and the Redefinition of Conflict in the Taiwan Strait. *Global Taiwan Brief*, Vol. 9, Issue 6 <https://globaltaiwan.org/2024/03/decoding-beijings-gray-zone-tactics-china-coast-guard-activities-and-the-redefinition-of-conflict-in-the-taiwan-strait/>

²³⁹ 國家安全局 (National Security Bureau). (2024). 《2024 年中共網駭手法分析》 [Analysis of the Chinese Communist Party’s Cyberattack Tactics in 2024]

these threats. What can be enhanced in cooperation with the US (who are interested in prevention of leaks regarding the ROC's defence capabilities) and like-minded countries (which face the same threats as the ROC, most notably Japan). This cooperation can be promoted through the state institutions (for example the AIT) in such forms as joint drills on cybersecurity, intelligence exchanges, and mutual contributions to the equipment development²⁴⁰.

Graph 4.1 Arms sales from the US to the ROC (billion dollars)²⁴¹



Arms sales to Taiwan have been repeatedly carried out by the US presidential administrations since George H.W. Bush administration (1990). In general, armament build up in Taiwan may indicate lack of trust to the PRC, and can serve as a particular case of a Hobbesian trap - a situation when players, due to mutual distrust, opt for deterrent strategies instead of cooperation, even though it brings less benefits for them²⁴². In the essay “Perpetual Peace”, Immanuel Kant elaborated on the ways to escape the Hobbesian trap²⁴³. Among these ways that have been historically relevant for the mankind, Kant emphasizes early Christianity as “universal religion”; the concept of political universality in a form of “a universal empire” in ancient Greek

²⁴⁰ Lorci, E. (2024, March 20). *The nexus of cybersecurity and national security: Taiwan's imperatives amidst escalating cyber threats*. Global Taiwan Brief, 9(6)

²⁴¹ Asia Society Policy Institute. (n.d.). *Taiwan policy database*
<https://asiasociety.org/policy-institute/taiwan-policy-database>

²⁴² Hobbes, T. (1651). *Leviathan, or the matter, form, and power of a common-wealth ecclesiasticall and civil* (pp. 76–79). Printed for Andrew Crooke. (Prepared for the McMaster University Archive of the History of Economic Thought by R. Hay)

²⁴³ Kant, I. (1903). *Perpetual peace: A philosophical essay* (M. Campbell Smith, Trans.). London: Swan Sonnenschein & Co. (Original work published 1795)

mindset; “a permanent union between...all Christian sovereigns” (the idea introduced by Charles-Irenee Castel de Saint-Pierre); security and protection from mutual harms (referring to Hobbes). Kant himself offers such conditions for perpetual peace as republican structure of states²⁴⁴, appeal to trade and not to war, and “the law of nations based upon a federation of free states”. Conceptualizing Kantian notions, it becomes possible to state, that the ideas that allows states to escape Hobbesian trap are democratization, liberalization, and cosmopolitanisation (gradual recognition that every single human being belongs to a single community).

What unites Kantian democratization as a precondition for perpetual peace with ideas offered by his predecessors, is recognition of the idea that universal values are necessary for construction of trust between states. “Universal” here should be understood not only from liberal democratic position that emphasizes individual rights and freedoms, but more broadly as a uniting concept. In this sense, East Asia in general, and China in particular can introduce their own concepts with potential to become universal. For example, Confucianism can serve as an example of a philosophy that unites East Asian societies. As examples of East and Southeast Asian democracies (Singapore, South Korea, Taiwan, Japan) demonstrate, it does not necessarily exclude democracy, and therefore can also become a universal uniting driver. As for contemporary concepts that resemble the ones offered by Kant, a political slogan of “Building a Community with a Shared Future for Mankind” can conceptually be aligned with cosmopolitanisation²⁴⁵. At the same time, further evolution and practical application of this slogan is yet to be seen: it is still unclear, whether it can work for the benefit of the humanity as a whole, or it merely serves immediate political needs of the PRC’s political leadership.

Based on the theories elaborated here, it becomes possible to state that armament build-up is rooted in distrust, and is a part of deterrent strategy to ensure one’s security. It is possible to eliminate distrust and construct new patterns of relations, but in order to achieve it, the following conditions should be met: 1) universal (shared) values have to succeed (preferably in a form of similar political structures); 2) countries have to resort to trade and not to war; 3) cosmopolitanisation should prevail.

As for the rationale behind the US arms sales to Taiwan, it serves political and economic interests of both the US and the ROC administrations. For the US, it is a tool to maintain its influence in the region and to protect critically important hub of advanced technologies. Therefore, arms sales to Taiwan secure the status-quo not only in the Cross-strait relations, but also in global economy in general. For the ROC, arms procurement from the US serves as an important tool to protect the regime from external threats²⁴⁶. Arms sales were included in the Taiwan Relations Act 1979 as a tool in relations between the US and the ROC, and president Reagan directly linked

²⁴⁴ Kant’s argument is that republican governments are bound by contracts with their citizens, and therefore are more easily subject to limitations in international relations. In his view, external peace between the states should be preceded with internal peace (“civil, social, economic, religious”. Since states restored to republican structure to achieve internal peace, therefore they have more rationale to trust each other in attempts to construct external peace. Civil peace and international peace, in Kantian perspective, go hand in hand

²⁴⁵ Wang Yi (2024, March 7). Building a Community with a Shared Future for Mankind Has Become a Glorious Banner Leading the Progress of the Times. Ministry of Foreign Affairs. The People’s Republic of China

https://www.mfa.gov.cn/eng/wjzbzd/202403/t20240308_11256416.html

²⁴⁶ Jonathan Masters and Will Merrow (2024, September 25). U.S. Military Support for Taiwan in Five Charts. Council on Foreign Relations

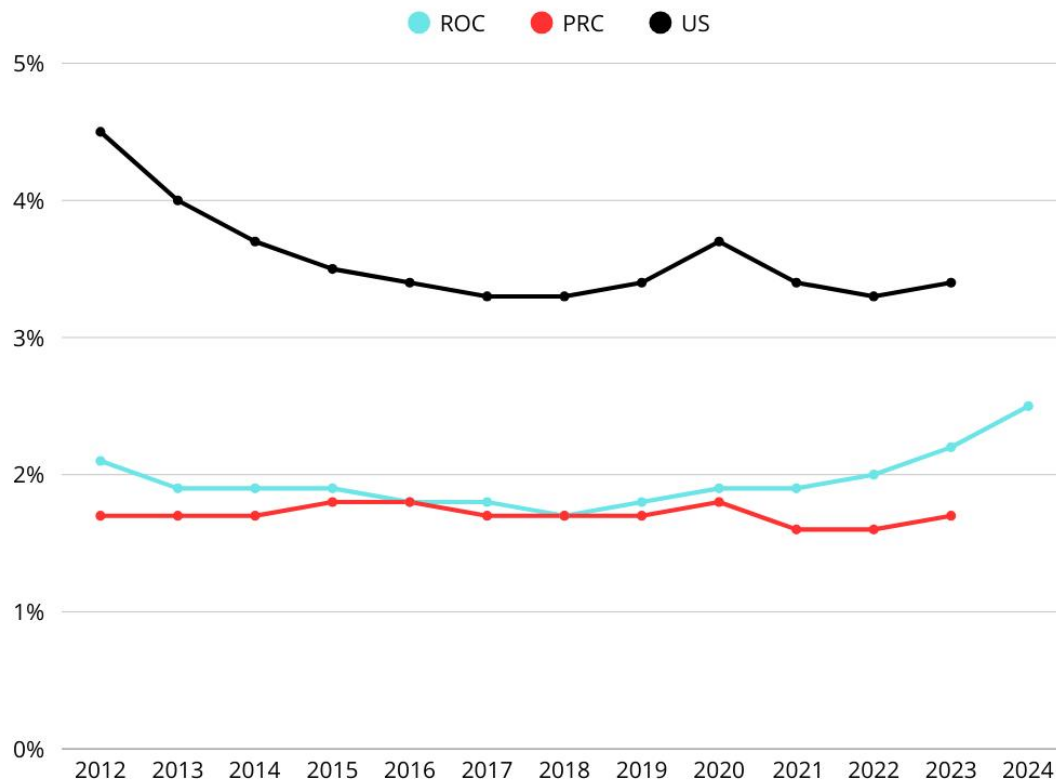
reduction of arms sales to Taiwan with the PRC's "continued commitment...to the peaceful solution of the Taiwan-PRC differences"²⁴⁷. This adds to the assumption that the main reasoning behind arms sales is distrust towards the PRC, and the perception that China rejects peaceful measures and favors coercion instead.

If we try to link the arms sales carried out recently with institutional dynamics in the selected period, we will see that arms sales peaked in 2019-2020, and therefore we have to take into consideration profiles of officials that had been in charge of the US policy making on China and Taiwan back then.. At that time, Mike Pompeo was the State Secretary. During his tenure, he sharply criticized the CCP, and advocated for a regime change in China²⁴⁸. A position of the National Security Advisor was taken by Robert O'Brien, who was later decorated with the ROC's Order of Brilliant Star with Special Grand Cordon "in recognition of his contributions to Taiwan-US relations"²⁴⁹ (see table 5.2). It allows us to assume, that Pompeo's tough stance on China, combined with O'Brien's firm pro-Taiwan orientation, contributed to more proactive and intensive arms sales to Taiwan.

²⁴⁷ U.S.-PRC Joint Communique (1982). American Institute in Taiwan
<https://www.ait.org.tw/u-s-prc-joint-communique-1982/>

²⁴⁸ Yen Nee Lee (2020, July 24). Pompeo's speech slamming China will have the "opposite effect", says former U.S. diplomat. CNBC
<https://www.cnbc.com/2020/07/24/pompeo-speech-will-have-the-opposite-effect-in-china-says-former-us-diplomat.html>

²⁴⁹ 中華民國總統府. Office of the President. Republic of China (Taiwan) (2023, March 21). President Tsai confers decoration on former White House National Security Advisor Robert O'Brien
<https://english.president.gov.tw/NEWS/6461>

Graph 4.2 Military spending (GDP %)^{250,251}

What is important to note in the context of China's military spending is the areas that are prioritized by the Chinese political leadership. In particular, China has changed its nuclear policy, and has started to expand its arsenal of Intercontinental Ballistic Missiles²⁵². The main driver behind the military build-up has been intensification of geopolitical tensions with the US, and transition of its rivalry on a new level of an existential threat for the PRC regime. In the view of Chinese leadership, Sino-American relations represent competition between antagonistic political systems - the situation that resembles the relations between the USSR and the US in the XXth century. Therefore, in order to gain political leverage in its relations with the US, China resorts to increase in its nuclear capabilities.

China's military spending in the late 2010's also has to be taken into consideration in the context of the PRC's economic development. Despite slowdown of the GDP growth rate in 2012-2020, military funding has remained stable and even increased in 2020²⁵³. It indicates, that priorities of Chinese political leadership, that previously prioritized economic performance, might have shifted in favour of military

²⁵⁰ Stockholm International Peace Research Institute. (n.d.). *Military expenditure database*
<https://www.sipri.org/databases/milex>

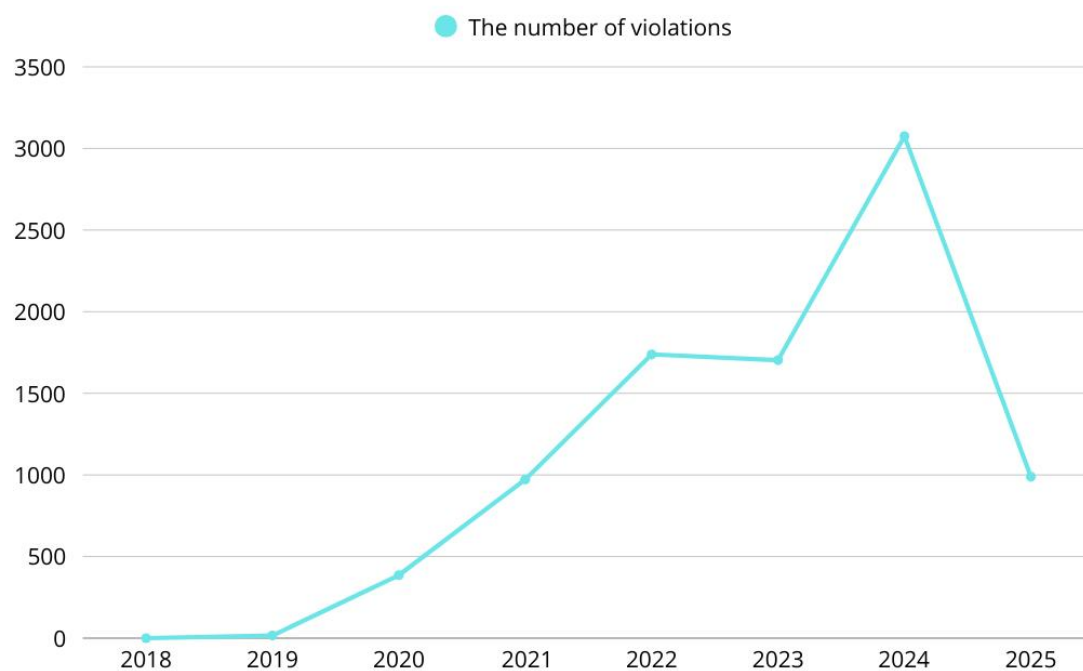
²⁵¹ Dotson, J. (2023, September 20). Taiwan announces an increased defense budget for 2024. *Global Taiwan Brief*, 8(18)

²⁵² Zhao, T. (2021, August 5). What's driving China's nuclear buildup? *Carnegie Endowment for International Peace*
<https://carnegieendowment.org/posts/2021/08/whats-driving-chinas-nuclear-buildup?lang=en>

²⁵³ Macrotrends. (n.d.). *China GDP growth rate 1961–2025*
<https://www.macrotrends.net/global-metrics/countries/chn/china/gdp-growth-rate#:~:text=China%20gdp%20growth%20rate%20for,a%203.71%25%20decline%20from%202019.>

build-up. It is also worth noting that China is not transparent in revealing its defense budget. For example, the budget of the China Coast Guard (the People's Armed Police) is omitted from the reports, even though this entity is actively utilized in the PRC's military activities in South China sea and Taiwan Strait²⁵⁴. According to estimation of the American Enterprise Institute, China's actual military spending is nearly equal the one of the US. This increase in militarization might be another tool for the PRC leadership to gain political leverage with the US through army modernization. This covert military build-up does not contribute to construction of trust across the straits, what in turn leads to continuous increase of the ROC military spending in 2018-2024.

Graph 4.3 PLA violations of Taiwan's ADIZ (Air Defense Identification Zone), the data for 2025 as of 7th of April²⁵⁵



Intrusions into Taiwan's ADIZ is a comparatively new tool in the PRC's arsenal. This tool has appeared started in 2019 (11-20 intrusions according to the database), and has been actively used since 2020 (when 381-390 total intrusions were documented). The PRC has been using intrusions more and more actively, and the number documented by April 2025 suggests that the CCP will not restrain itself from this tool or limit the amount of intrusions in the near future. On the contrary, the number of intrusions has been on the rise even after the Fourth Taiwan Strait Crisis in August 2022. This increased activity allows us to make a few assumptions regarding the perspectives of the PRC's policy-making on Taiwan.

²⁵⁴ Mackenzie Eaglen (2024, June 13). China's Hidden Military Spending. The American Enterprise Institute

<https://www.aei.org/op-eds/chinas-hidden-military-spending/>

²⁵⁵ Brown, G. C., & Lewis, B. (n.d.). *Taiwan ADIZ violations*. China Power Project, Center for Strategic and International Studies

<https://chinapower.csis.org/data/taiwan-adiz-violations/>

First, the new team compiled by Xi after 2018 (see the tables 1.2 and 1.3) focuses on routinization and normalization of new forms of coercion in Cross-strait relations. If in 2012-2018 the PRC restrained itself from this tool in its relations with Taiwan (although leaving it possible in the relations with Japan and South Korea²⁵⁶), 2019 was marked as a year when the PRC leadership first introduced it in its array. In future, it becomes reasonable to expect that the PRC will be able to utilize new forms of military (and non-military) coercion, either entirely new created or previously tested in its relations with other regional powers.

Second, the PRC might use emerging tensions in the Cross-strait relations to normalize intrusions and coercion with a new level of intensity. As such, the amount of intrusions almost doubled in 2022 compared to 2021 (1738 to 972), and continued to grow since 2024. Normalization of intrusions, alongside with increase in amount of military drills²⁵⁷, and overall intensification of military operations around the island is dangerous, because it may decrease awareness and consequently capabilities to resist, since a significant military operation aimed at the seizure of the island by force potentially can be masked as a regular military drill.

Third, continuous presidential terms of the DPP candidates do not convince the PRC leadership in inefficiency of coercive measures. On a contrary, it correlates with an increase in intensity of coercion. The desire to influence the results of parliamentary and presidential elections does not seem as a credible explanation of these intrusions: amid the Legislative and Presidential elections in January 2024, December 2023-February 2024 were marked as the months with the lowest amount of intrusions since July 2022. More likely, these intrusions can be seen as an attempt to intimidate the existing political establishment rather than alter voters' preferences.

²⁵⁶ Trent, M. (2020). *Number of Chinese unauthorized ADIZ intrusions by year & country*. In *Over the line: The implications of China's ADIZ intrusions in Northeast Asia*. <http://www.jstor.org/stable/resrep26130.8>.

²⁵⁷ In 2023, the PRC held three military drills in response to the ROC-US cooperation in political and military spheres. The amount of drills in 2023 has surpassed the intensity demonstrated by the PLA in 2018-2022

Jash, A. (2024, October 2). China's military exercises around Taiwan: Trends and patterns. *Global Taiwan Brief*, 9(19). Global Taiwan Institute

7. Discussion

This section summarizes the results that were obtained in the research process. Both long-term and recent trends in relations between the participants are emphasized and linked with institutional dynamics. The section ends with proposals of short-term and long-term solutions based on theoretical framework utilized in the present thesis.

1) Trends in relations between the PRC, the ROC, and the US

What has to be highlighted after processing the data presented in the research, is how many people's living conditions depend on the will, decisions, and preferences of particular individuals. What unites decision-making systems of the ROC, the PRC and the US, is a heavy reliance on a president's (or the party secretary general's) credentials. Although decision-making systems of the ROC and the US are comparatively balanced with democratic elections and Legislative institutions (in case of the US), it is still evident how drastically lives of thousands and millions of people depend on individual decisions of the authorities. The flows of capital and people have decreased dramatically, and this reduction is yet to be mitigated. The tendency of continuous decline of applied "carrots" and "nets", and inclination towards "needles" and "sticks" of various kinds and sorts, is an alarming trend. More specifically, recent negative trends (increases in "needles" and "sticks", decreases in "carrots" and "nets") include:

1. **Increase** in amount of the PLA violations of Taiwan's ADIZ (graph 4.3). In 2023, the number accounted for 1703 cases; in 2024 - 3075; as for 7th of April 2025 - 989 cases recorded. The number is likely to grow in 2025 compared to previous year, and most probably will greatly exceed previous numbers
2. **Increase** in military spending (graph 4.2). The ROC has been gradually lifting its military GDP since 2018. If in 2018 it accounted for 1,7% of the GDP, by 2024 it constituted for 2,5% of GDP. The US and the PRC also have increased their budgets in 2023. Even though these changes might seem negligible (changes from 1,6% to 1,7% for the PRC, from 3,3% to 3,4% for the US), one should take into consideration that a significant part of the PRC's defence budget is hidden; in addition, China's military build-up comes not only in increased spending, but also in enhance of nuclear capabilities, what might bring new threats to global stability
3. **Increase** in arms sales (Graph 4.1). Arms procurement by the ROC has been continuously on increase since 2021. If in 2021 these sales accounted for 0,75 billion dollars, by 2024 they constituted for 3,3362 billion dollars
4. Increase in Chinese cyber threats in Taiwan (Graph 3.2). If in 2023 an average of 1,2 million threats per day were recorded, in 2024 this number doubled and accounted for 2,4 million cases per day on average
5. **Increase** in intensity of Chinese espionage in Taiwan (graph 3.1). In 2022, the number of people accused of espionage was 10; by 2024, it increased and accounted for 64 by the time
6. **Decrease** in professional migration from China to the US (graph 2.3) from 67950 people in 2022 to 59260 in 2023
7. **Decrease** in student exchanges on several directions (graph 2.2). The amount of Chinese students heading to Taiwan has been on decrease recently (from 4651 students in 2023 to 3852 students in 2022); as for the US, here also the number of students from China has been on decline, and this trend is much more rooted

(gradual decrease since 2019, when 3723532 students went to study in the US; by 2023, the amount has shrunk to 277398 students). The state agencies have stopped publishing credible data regarding Taiwanese students in mainland China, and a category of the US students in China has become practically non-existent by early 2020's (even though 11639 American students studied in China in 2018). Overall, students is a category that has been subjected the most to political changes and covid effects.

8. Decrease in PRC investments in the US (graph 1.2.1). In recent years, Chinese investments in the US economy have significantly reduced from 3770 million dollars in 2021 to 2500 million dollars by 2023

9. Decrease in exports between all the PRC, the ROC and the US in 2022-2023 (graph 1). As for the ROC, its exports to mainland China have been on decrease since 2021. It seems that the war in Ukraine has motivated the countries to diversify their markets, and reduce dependency on each other

As follows from the data gathered and processed, there have been an increase in all categories of “sticks” and “needles”. As for “carrots” and “nets”, a bright side can be found in gradual (albeit slow) resumption of tourist exchanges after covid pandemic. At the same time, patterns of these exchanges have changed drastically, and both the ROC and the PRC governments have imposed political limitations on tourist exchanges. Chinese tourists have become the least populous group of travellers by early 2020's (graph 2.1). This group, on par with students, have been influenced the most by both political and covid effects. Long-term effects from lack of expertise on other actors can be costly for all the PRC, the US, and the ROC in future. On the other side, decrease in student flows between China, the US and Taiwan is an opportunity for other countries to attract these students and construct mutually beneficial relations. This is already being done by Southeast Asian countries (such as Thailand and Malaysia), and the EU might also come up with incentives.

The increasing amount of espionage cases, cyberwarfare operations, and ADIZ intrusions coupled with ongoing militarization of the island indicate that the trust between the three sides has been on decline. It seems that the countries have exclusively opted for the use of deterrent strategies, what in turn has led to a situation resembling Hobbesian trap. There are ways to escape this trap, but great steps should be made by all sides in order to achieve it. As for now, the chances for any developments towards universal values, liberalization, or cosmopolitanization remain low.

Decrease in people-to-people exchanges (tourist exchanges, educational and professional migration) and disputes between state institutions on these matters also indicate that these processes have been politicized. It is especially relevant for education, since it is not seen as a matter of personal choice; on the contrary, governments seek for opportunities to alter the choices made by citizens, and present these choices in their own favour.

An important event that has contributed to the decline in cooperation and increase in coercion is elimination of Xi's presidential terms in 2018. It was after 2018 when the ADIZ intrusions were routinized as a tool in Cross-strait relations, and espionage cases went on increase. It has become much harder to view Cross-strait exchanges as a source of opportunities rather than threats - it is evident from increased military expenses, ongoing arms procurement, and shrinking of both economic and people-to-people exchanges.

2) *Key timeframes and institutional developments*

Overall, I would evaluate the period from 2016 to 2020 with particular emphasis on Spring 2018 as a turning point in relations between the ROC, the PRC and the US. It was in this period when the relationships between the three parts started to be perceived as a threat rather than opportunity, and these perceptions were exacerbated by personnel dynamics in February-April 2018. Abolition of Xi's terms, continuous occupation of key offices in the ROC and the US administrations by the DPP and Republican party officials respectively significantly contributed to deterioration of cooperation, and increase in coercion between the ROC, the PRC, and the US.

Speaking more specifically on rotation within the US and the ROC administrations, since April 2018 key positions in the US presidential administration were taken by harsh critics of Chinese regime (see table 5.2) - Mike Pompeo (the State Secretary since April 26, 2018 till January 20, 2021) and John Bolton (the National Security Advisor since April 9, 2018 till September 10, 2019; substituted with an official with a strong pro-Taiwanese profile Robert O'Brien). In the ROC administration, it was the period when consolidation of offices in hands of the DPP was underway (see table 2.2). After Chen Ming-tong assumed the office of the MAC minister, the last remaining non-DPP official in the key ROC institutions was David Lee (KMT, the NSC Secretary-General; left the office in May 2020). These changes came close to abolition of Xi's terms in March 2018, and although they are not necessarily causally linked with each other, they have resulted in a situation when responsible officials see deterrence as the only possible strategy. The results of their choices in a form of continuous increase in coercion, and decrease in cooperation are evident.

The rotation within the ROC administration should be perceived in a context of great importance of presidential decisions in the appointments. Offices in the institutions in charge of Cross-strait relations have become a necessary condition for potential ROC presidents who belong to the DPP. Cai Ing-wen, the ROC president in 2016-2024, served as the MAC minister during Chen Shui-bian's first term, and Lai Ching-te (the current ROC president) served as the ROC Premier during Cai's first term (the DPP candidate on unsuccessful for the party presidential elections in 2008, Frank Hsieh, also served as a Premier of the Executive Yuan prior to the elections). In a situation when political power is consolidated in hands of the DPP, officials picked by the president (whether directly, in case of the Executive Yuan and the NSC, or indirectly, in case of the MAC) are more likely to share his views on how to combat the existential threat emanating from the PRC. Therefore, it becomes likely that the next DPP running candidate is serving (or about to serve) in Lai's administration on key positions in charge of Cross-strait relations. In this case, the expertise gained in the office would become instrumental for introduction of new deterrent strategies in relations with mainland China - just as it has been in cases of Cai Ing-wen and Lai Ching-te. Concentration of power around the DPP in Spring 2018 has become one of the factors that contributed to increased tensions in Cross-strait relations, and if this trend continues we can expect enhance in role of the NSC and transformation of the MAC. Its role as an agency responsible for development of Cross-strait ties has been on decrease, and therefore it might be empowered with responsibilities aimed at deterrence, and not cooperation.

3) Existing problems and probable institutional solutions

The main issues that can be emphasized as factors contributing to rise of tensions between the ROC, the US, and the PRC are consolidation of power and mutual distrust. As demonstrated by the graphs, till now students has been the category influenced the most by these political developments. Politicization of higher education limits both the expertise that a state is able to get, and freedoms of individuals - but it eliminates risks of disloyalty to the regime among perspective elites. In this sense, depoliticization of education becomes an important step for all the reviewed actors, and educational reforms initiated by political figures have to be rigorously overseen. I would argue, that it becomes much harder for political figures to alter choices of students in their own favor, if political power is not consolidated, but distributed. Therefore, recommendations on the issue should elaborate on limitations of those who are in power, and contribute to principles of proportionate and consensual governance. In particular, legally binding not only Legislative, but also Executive institutions to the principle of proportionate governance can be taken into consideration. Such measure would imply greater consensus and communication between a ruling party and opposition, and consequently would mean a transition from “winner-takes-it-all” mentality to more cooperative and collaborative strategies. Ultimately, this tool might become effective to counter consolidation of power.

Another issue that has to be addressed is mutual distrust. As demonstrated by the research, this distrust has been particularly on the rise since February-April 2018, when succession norms in the PRC were changed and suspiciousness about the PRC has come along with consolidation of power in the US and the ROC. At the same time, there are several steps that can be done by Chinese political leadership that would decrease this mistrust and contribute to construction of credibility. First, the use of force, that China currently does not renounce in any case, can be bound to certain conditions (such as, for example, declaration of de-jure independence by Taiwan authorities). Potentially, it would eliminate uncertainties and decrease risks of unintentional escalation in Cross-strait relations, and consequently weaken positions of officials who are hawkish towards China. Second, credible succession mechanisms have to be implemented. Personalist autocracies, in which political power vested in the hands of a single individual without feasible opportunity for transition, are approached with suspicion by other regimes due to instability, and as an example of Russia has demonstrated rightfully so. With restoration of transparent succession norms in the PRC, the risk of escalation that is caused by an autocrat’s desire to stay in power decreases drastically, what in turn naturally contributes to construction of trust between the actors. These measures are feasible in short-term and middle-term perspective, and therefore can be implemented without negotiations on other questions that the CCP perceives sensitive for its legitimacy. As for long-term solutions, they can come in forms resembling those introduced by Kant, and rest upon principles of shared values, liberalization, and cosmopolitanization.

Use of AI

In the process of thesis writing, I used AI for linguistic purposes. In particular, I used AI tools to make sure my language is coherent enough, corresponds with academic requirements, and does not contain any grammar or logical mistakes. I also used AI as a search engine in situations when it was complicated to find reliable sources that contain data that I need. ChatGPT was used in a process of designing an abstract of the thesis, and to adjust all the sources that I used in a single format. Thus, ChatGPT has significantly saved my time on monotonous work, that I dedicated to improve other sections of the thesis.

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