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The Implications of the Trump Administration's New Tariffs on Imports from Taiwan

By: Riley Walters

Riley Walters is a Senior Non-Resident Fellow with the Global Taiwan Institute and Senior Fellow at Hudson Institute.

For many, US trade policy under the Trump Administration has become a challenge to navigate. On July 31, the Trump Administration announced that imports from Taiwan will be subject to a 20 percent tariff starting as early as August. This will apply to goods that were, until recently, eligible for *de minimis* (imports valued under USD 800) treatment, but excludes certain sectoral goods like automobiles and metals that have higher tariff rates. Meanwhile, there are exemptions for semiconductors and personal electronics.

Most of the goods that Taiwan exports to the United States are still exempt from this new tariff (following sectoral exemptions made in April), but this could change at any moment. At the time of writing, President Trump has already signaled new tariffs on semiconductor products, which could be announced soon and could reach as high as 100 percent.

The recent 20 percent reciprocal tariff announcement creates a number of challenges for Taiwan and its companies. First, while 20 percent is lower than the 32 percent tariff originally threatened by the Trump Administration, it is still much higher than what American importers are used to paying. It will also be slightly higher than the 15 percent reciprocal rate President Trump negotiated with neighboring countries like Japan and South Korea. This puts small and medium-sized Taiwanese companies at a cost disadvantage when compared to their regional competitors.

While many in Taiwan may be critical of the Trump Administration's trade policies, nearly every foreign government is grappling with their own set of US tariffs. Even American allies with which the United States enjoyed large trade surpluses are now facing new tariffs on their exports.

There are still opportunities for the Lai Administration to strike a deal with the Trump Administration, but the reality is that Lai Ching-te (賴清德) may not be able to secure a much lower tariff rate than 15 percent. Meanwhile, high demand in the United States for the construction of artificial intelligence (AI) data centers continues to inflate the US trade deficit with Taiwan.

And as President Trump has made clear many times, he does not like trade deficits.

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Global Taiwan Institute
1836 Jefferson Place NW,
Washington DC 20036
contact@globaltaiwan.org

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Decoding the Trade Laws

Recent tariffs by the Trump Administration can be generally separated into two categories: reciprocal tariffs and sectoral tariffs. The distinction between these two categories mostly comes down to which law the Administration uses to enact the tariff.

The Administration applies reciprocal tariffs through the use of the *International Emergency Economic Powers Act* (IEEPA). The reciprocal tariff rate of 20 percent is applied to all imports from Taiwan except for goods that are under exemption or those subject to sectoral tariffs. Alternatively, President Trump applies sectoral tariffs via the *Trade Expansion Act of 1962*—following a Section 232 investigation stipulated by the Trade Act.

Sectoral tariffs are generally narrow and apply to specific goods like steel or automobiles but the Trump Administration has initiated over a dozen Section 232 investigations (including those from the first Trump Administration) covering a wide range of goods including: semiconductors, semiconductor manufacturing equipment, automobiles, automobile parts, critical minerals, pharmaceuticals, steel, aluminum, copper, and several other products. Not all Section 232 investigations have resulted in tariffs yet. Presently, Section 232 investigations have led to a 25 percent tariff on imports of automobile and automobile parts, and a 50 percent tariff on steel, aluminum, and copper.

Timeline of US Tariffs on Taiwan

America imports a wide variety of goods from Taiwan, buying over USD 116 billion worth of goods in 2024. Most of these products were computers, computer accessories, and semiconductors. On April 2, the Trump Administration threatened to place a 32 percent reciprocal tariff on imports from Taiwan. On April 9, that rate changed to 10 percent to allow Taiwan and other countries time to negotiate a trade deal with the White House. On April 11, the White House then exempted many technologies from these tariffs, including smartphones, computer parts, and servers.

US Imports from Taiwan, 2024		
Goods under April 11 tariff exemption	USD 73.9 billion	64%
All other imports	USD 42.4 billion	36%
Total imports from Taiwan	**USD 116.3 billion**	**100%**

Table: US Imports from Taiwan, 2024. (Table Source: Author, US Census Bureau trade data)

Because of the April 11 exemptions, more than half (64 percent, based on 2024 data) of the goods imported from Taiwan are still exempt from tariffs, including the new 20 percent reciprocal tariff announced on July 31.

Last year, the United States also imported USD 2.2 billion worth of screws, bolts, nuts, and similar articles (HTS Code 7318), USD 1.9 billion worth of motor vehicle parts (HTS Code 8708), and USD 1.5 billion worth of electrical transformers and power supplies (HTS Code 8504) from Taiwan. These items are not exempt and will either face a 20 percent reciprocal tariff, a 25 percent sectoral auto tariff, or a 50 percent sectoral steel tariff, depending on the specific product.

Neighboring countries like China, Japan, and South Korea are also major exporters of many of these goods. While goods coming from China are subject to an especially high tariff rate, countries like Japan and South Korea have negotiated lower reciprocal tariff rates than Taiwan. In addition to the burden of the tariffs alone, this relative disadvantage puts additional pressure on Taiwan's cost-sensitive small and medium sized companies.

The Politics of Trade

The Trump Administration's new trade policy has posed major challenges for all foreign governments. The Lai Administration is no exception. As President Trump has remarked, he believes all countries, "friend and foe alike," have been ripping off the United States through unfair trade. But, instead of countering his tariffs, such as by raising duties on American exports, most governments have decided to try for a trade deal instead.

Negotiators from Taiwan have met with US officials several times over the last few months. They have no deal yet to show for it. Given that Taiwan's 20 percent tariff rate is higher than Japan, South Korea, or the European Union's 15 percent, Lai and his negotiating team are under pressure. However, Trump stated that the relatively advantageous 15 percent rates are a consequence of the multi-billion dollar investment commitments made by these trade partners.

At this point, the Lai Administration has not publicly committed to any major new investments in the United States, nor any significant removals of tariff and non-tariff barriers to US exports to Taiwan.

Could the Lai Administration reduce Taiwan's 20 percent tariff rate to 15 percent if it made these significant and politically-sensitive commitments? Perhaps, but there is no guarantee.

The Trade Deficit Grows

It's hard to foresee how US trade policy will unfold over the next few years of the Trump Administration. But if there's one metric that can be used to determine whether trade relations will improve or not, that would be the US trade balance. Unfortunately for US-Taiwan trade, the trade balance is not improving.

The United States buys more goods than it sells to Taiwan. This means that the United States runs a goods trade deficit with Taiwan, and that deficit has increased every year. Last year, the trade in goods deficit with Taiwan was USD 74 billion. This is more than double the USD 30 billion goods deficit between Taiwan and the United States in 2020. The goods deficit with Taiwan for the first half of 2025 is already reaching three-quarters (USD 56 billion) of the USD 74 billion goods deficit recorded last year. Averaging over USD 6 billion a month, this means the goods deficit for 2025 will likely be higher than it was in 2024.

Some of the increase in trade with Taiwan may be a consequence of businesses trying to get ahead of new tariffs by front-loading purchases. But a more likely explanation is the AI boom that is going on in the United States, which the Trump Administration is also actively promoting.

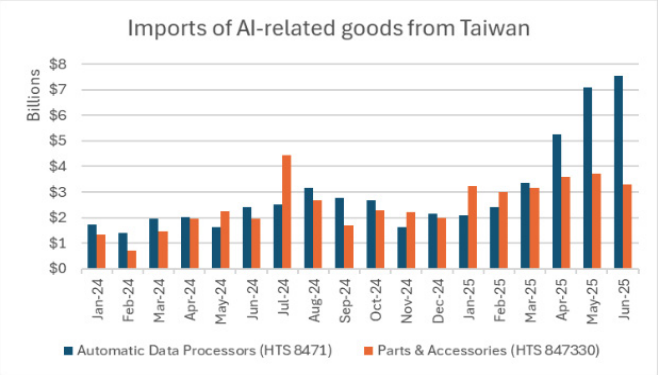

Image: Imports of AI-related goods from Taiwan. (Image Source: Author, US Census Bureau trade data)

The monthly value of AI-related imports from Taiwan has increased nearly 300 percent since January. In June, the United States imported USD 11 billion worth of automatic data processors, parts, and accessories. These are also goods that are currently exempt from tariffs following the April 11 exemption.

Conclusion

US trade policy is not easy for either private companies or governments to navigate. Even as many in Washington champion the importance of Taiwan and US-Taiwan relations, US trade policy continues to complicate even the most important partnerships. Despite this trade uncertainty, there is still opportunity in the US-Taiwan relationship. Whether regarding technology development or defense interests, the relationship cannot be upended because one aspect of the US-Taiwan ties (trade policy) has become a contentious issue.

In April, President Lai published a *Bloomberg* article titled "Taiwan Has a Roadmap for Deeper US Trade Ties." In many ways, Lai pitched the same roadmap that other governments have been following to negotiate with the United States. First: recognize that the trade balance is unfair. Second: consider ways to improve the balance, such as removing trade barriers and buying US more goods, from agricultural products to weapons.

In addition to these proposals aimed at addressing the trade balance, Lai also highlighted significant investments already underway in the United States by Taiwanese companies. Furthermore, Lai suggested new ways to partner with the United States on shared interests, such as cooperating on export controls and transshipment concerns.

Many of these proposals are still achievable. In fact, these are the exact measures policymakers would be discussing if foreign relations were not currently so dominated by US trade policy.

The main point: Taiwan's 20 percent reciprocal tariff rate for exports to the United States puts it at a slight cost disadvantage to neighboring countries such as Japan and South Korea. However, over 60 percent of Taiwan's imports—such as smart phones and data processors—are currently exempt from tariffs. Despite suffering a higher tariff rate, the Lai Administration has not publicly committed to reducing tariff and non-tariff barriers for US exports, unlike other governments. Whether Taiwan can negotiate for a lower rate will become even more complicated as the US deficit with Taiwan continues to grow.

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South Korea Could Support Taiwan in a Dual Contingency

By: Ju Hyung Kim

Dr. Ju Hyung Kim is the president of the Security Management Institute—a defense think tank affiliated with the South Korean National Assembly. He is currently adapting his doctoral dissertation, Japan's Security Contribution to South Korea, 1950 to 2023, into a forthcoming book.

With tensions rising in East Asia, the likelihood of a dual contingency—both in the Taiwan Strait and on the Korean Peninsula—is far from a hypothetical scenario. A simultaneous contingency—where war breaks out concurrently in the Taiwan Strait and on the Korean Peninsula—would generate deeply complex strategic challenges for the United States and its allies in the region. Under such grave conditions, South Korea would undoubtedly face strategic, operational, and legal constraints in assisting Taiwan. Nevertheless, despite such constraints, South Korea could still take concrete steps to meaningfully deter the aggressors and help a US-led coalition mount an effective response.

Legal and Strategic Constraints

Unlike Japan and Australia, South Korea's allied security commitment is narrowly defined to threats stemming from the Korean Peninsula. The US-Republic of Korea (ROK) Mutual Defense Treaty, signed in 1953, does not require Seoul to respond to external military emergencies such as a Taiwan conflict. Although the treaty does not preclude voluntary cooperation, it does not impose any legal duty on South Korea to act in overseas crises.

Moreover, South Korea's immediate mission during a dual contingency would be the defense of its own territory. According to a US Congressional Research Service report, the Trump Administration had considered withdrawing up to 4,500 US troops from Korea (although this has been denied by US officials). Such indications reflect how fragile the US commitment to Korea might be during a large-scale crisis in the Indo-Pacific. Under such circumstances, South Korea's strategic options would be severely constrained, and national survival would take precedence over managing crises in distant theaters.

Nevertheless, South Korea's geographic location, military strength, and alliance network could still provide meaningful strategic utility in a dual contingency—especially if closely coordinated with US and Japanese policymakers.

Three Ways That South Korea Could Contribute

South Korea could, albeit in a constrained way, offer tangible support to Taiwan through the following three approaches: safeguarding sea lines of communication (SLOCs), enabling allied mobility, and preserving overall deterrence on the Korean Peninsula.

Safeguarding the SLOCs Near the Taiwan Strait

Given South Korea's high dependence on international trade, its economic viability hinges on securing SLOCs. Roughly 90 percent of South Korea's oil imports transit through the South China Sea, including key chokepoints such as the Malacca Strait, the Bashi Channel, and the Luzon Strait. These maritime routes are located near the Taiwan Strait and are essential for South Korea's access to Middle Eastern and Southeast Asian energy. Any conflict in these areas would result in significant strategic consequences. In a Taiwan contingency, such routes would likely be contested by the People's Liberation Army Navy (PLAN).

In this context, deploying South Korean Navy (ROKN) assets—including destroyers, submarines, and support vessels—would achieve two purposes: this could safeguard South Korea's economic lifelines and contribute as a participant in a naval coalition aiming to counter China's efforts to dominate strategic waterways. Although such efforts by South Korea would not amount to direct combat, they would undoubtedly play a crucial role in bolstering regional deterrence and improving the operational flexibility of allied naval forces.

Image: ROK Navy sailors wave flags to welcome Los Angeles-class fast-attack submarine USS Columbia to South Korea's Busan Naval Base on November 18, 2024. (Image source: Wikimedia Commons.)

Supporting Taiwan by Facilitating United States Forces Korea Redeployment

Although the chance of South Korea sending combat troops and warships directly to Taiwan is low, it could still assist by allowing effective redeployment of US forces stationed on its soil, which are collectively under the command of United States Forces Korea (USFK). Currently, United States Forces Korea maintains a variety of military installations in South Korea, including Osan and Kunsan Air Bases, a detachment at the Busan Naval Base, and the Camp Humphreys US Army headquarters.

Through cooperation with the Indo-Pacific Command, Seoul could ease the burden of US forces needed in Taiwan by allowing part of the resources of United States Forces Korea to be shifted to the Taiwan theater, while reinforcing its own defenses. In this scenario, United States Forces Korea could serve as a rear-area staging point for the Taiwan crisis, while South Korea remained prepared to counter North Korean threats. For this to occur, prior US-ROK bilateral planning would be needed to resolve issues such as command-and-control authority, domestic political concerns, and logistics coordination. The South Korean public might oppose the idea of supporting Taiwan due to concerns about

unnecessarily provoking China. In response, the South Korean government could tell the public that supporting the United States in this case would enhance US-ROK alliance credibility, thereby signaling to North Korea that, in the event of a Korean contingency, it would be reasonably predictable for the United States to honor its commitment.

Deterring North Korea's Strategic Opportunism

The most critical way for South Korea to indirectly support Taiwan would be to prevent North Korean aggression from spilling out into other parts of the region, such as Japan. Based on my interviews with several Japanese Self-Defense Force officers, a considerable portion of Japan's air and naval forces would be allocated to Taiwan in a crisis. This could reduce Japan's ability to assist US forces during a Korean contingency. In short, although Japan's potential role has been expanded in the case of a dual contingency—as outlined in Japan's collective self-defense posture and the 2015 US-Japan Defense Guidelines—US Forces Japan (USFJ) would still prioritize Taiwan's defense over South Korea, which physically limits Japan's ability to help South Korea in a dual contingency.

Historically, North Korea has exploited windows of distraction to escalate. For example, it withdrew from the Non-Proliferation Treaty (NPT) during the 2003 Iraq War and stepped up missile launches amid the peak of the Russia–Ukraine conflict. Based on this pattern, North Korea could view a Taiwan contingency as a strategic opening. In such a scenario, South Korea must strengthen its deterrent posture and assure the United States and Japan that the Korean theater is under control. This would require preemptive deployment of missile defense systems, counter-battery capabilities, and rapid-reaction units along the Demilitarized Zone (DMZ).

This possibility was examined in the Atlantic Council's recent report, *A Rising Nuclear Double-Threat in East Asia: Insight from our Guardian Tiger I and II Tabletop Exercises*, which explored the risk of North Korea using tactical nuclear arms against South Korea. The report emphasized that such a development would impose serious strain on both South Korean and US forces.

Tabletop Exercises for Realistic Integration

To make these measures effective, more than goodwill is needed. Detailed planning and practical drills are essential. One of the most impactful initiatives would be the institutionalization of US-Japan-ROK trilateral tabletop exercises (TTXs), tailored to a dual contingency.

These exercises should address force distribution, logistics frameworks, communication systems, and political signaling. They must also cover the gray area between support roles and direct combat—which is where South Korea could make its most distinctive contribution. From a strategic standpoint, Taiwan and the Korean Peninsula are interconnected; thus, incorporating South Korea's viewpoint in Taiwan-related planning is not optional but essential.

The 2023 Camp David Summit between the United States, Japan, and South Korea laid the groundwork for such trilateral action. At the summit, the three leaders agreed to institutionalize annual trilateral meetings, conduct multi-domain military exercises in a regular manner, and enhance data sharing of real-time missile warning.

The time has come to translate shared principles into implementation plans—defining the process for repositioning United States Forces Korea assets, ensuring successful Korean Peninsula deterrence, and executing engagement protocols near Taiwan.

The Need for Strategic Clarity

Even indirect involvement could subject South Korea to political and economic backlash. For example, maritime patrols around the Taiwan Strait and logistical support for United States Forces Korea redeployment could prompt Chinese retaliation in forms such as cyberattacks, economic sanctions, or gray-zone incursions. Given its dependence on the Chinese market, South Korea would face substantial exposure. Additionally, public perceptions that South Korea is becoming too deeply entangled in Taiwan's defense could provoke domestic opposition.

This dilemma illustrates that inaction also carries risks. South Korea must be prepared to justify its actions to the public on grounds of national interest and alliance commitments, while also remaining alert to how adversaries may exploit strategic ambiguity.

Political Decisions and Strategic Vision

In a dual contingency, South Korea's contribution to Taiwan's defense cannot—and should not—reach the same level as that of the United States or Japan. The ROK's top priority will be to defend its own sovereignty and citizens. Yet, this does not limit South Korea to a passive observer while the region descends into chaos. Indirect engagement, deterrence stability, and force support are all viable policy options that Seoul can pursue to promote Taiwan's defense.

Implementing these actions will be politically and operationally difficult. Domestic divides, unequal alliance roles, and practical constraints will pose significant hurdles. However, waiting until a conflict breaks out would be too late. South Korea's strategic function in a Taiwan crisis must be defined while there is still room for coordination, credibility, and foresight.

The main point: Despite legal and operational constraints, South Korea could support Taiwan in three critical ways—securing SLOCs, enabling the redeployment of United States Forces Korea to Taiwan, and bolstering deterrence on the Korean Peninsula. In order to achieve this, trilateral US-Japan-ROK planning and drills must be firmly institutionalized.

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Results of the July 26 Recall Elections

By: Ben Levine

Ben Levine is a programs coordinator at the Global Taiwan Institute.

On July 26, 24 Kuomintang (KMT, 國民黨) legislators and one Taiwan People's Party (TPP, 民眾黨) mayor faced recall votes. This high number of recalls was without precedent in Taiwan's recent political history. Although the number of legislators being recalled was abnormal, the right to recall elected officials in Taiwan is prominently featured in Taiwan's election law *Public Officials Election and Recall Act* (POERA, 公職人員選舉罷免法). This article examines the background of recall elections, Taiwanese public opinion heading into the recalls, the results of the recall elections, and how this may shape future political dynamics both in Taiwan and abroad.

Background

The 2024 Taiwanese elections produced a divided government, with the Democratic Progressive Party (DPP, 民進黨) winning the presidential election, and the KMT winning a plurality of seats in the Legislative Yuan (LY, 立法院), Taiwan's unicameral legislature. Because the KMT did not win a majority of the 113 seats, the party established a governing coalition with the TPP. As soon as the new legislature was seated in early 2024, the KMT/TPP coalition proposed amendments to the *Legislative Yuan Exercise of Official Powers Law* (立法院職權行使法), in which the LY's investigative powers were to be strengthened. Under this amendment, government officials could be compelled to testify, provide documents, and face steep penalties for non-compliance. These amendments prompted concerns about the potential shift of power away from the executive branch towards the legislative branch without sufficient oversight.

The proposed changes sparked widespread backlash against the KMT/TPP coalition, particularly among younger Taiwanese who viewed the amendments as a threat to checks and balances amongst the branches of government–and in a broader sense, to Taiwan's democracy as a whole. This led to the rise of the Bluebird Movement (青鳥行動), a protest movement that led the opposition to these amendments. The KMT/TPP coalition ultimately passed the amendments, but the Constitutional Court subsequently struck them down as unconstitutional. This background, and the civic activism of the Bluebird Movement, set the stage for the July 2025 recall campaigns.

Taiwanese Public Opinion

Public opinion polling indicated that a plurality of Taiwanese leading up to the recall elections did not approve of them (*see the table below*). Throughout this time period, support for the recall stayed consistent around 40 percent, and this data showed that opposition to the recalls was greater than support in the months leading up to the recall elections. The apparent lack of public support for the recalls could be because some Taiwanese voters saw the widespread use of recalls as a partisan tool rather than a legitimate check on the LY. Taiwan's politics are already heavily polarized. Given this polling data, it appears that many voters perceived the recall elections not as a defense of Taiwanese democracy, but as a politically motivated effort.

Date	Support Recall	Oppose Recall	Not Voting	Don't Know	Undecided
May 2025	40.1%	44.2%	7.0%	3.5%	5.3%
June 2025	39.3%	48.9%	4.6%	3.4%	3.9%
July 2025	39%	44.1%	5.7%	5.4%	5.7%

Table: Public Opinion on the Great Recall (Table source: Taiwanese Public Opinion Foundation [May, June, July])

Results of the Recall Elections

All of the 24 legislative seats that were up for recall on July 26 were held in KMT-leaning districts, which made for an uphill battle by civil society activists. To succeed, the recalls would either need a large number of voters who voted for the KMT in the previous election to change their minds; or else for there to be a dramatic difference in turnout between pro-DPP and pro-KMT voters. The KMT has long been known to have well-organized and influential local patronage networks, in which the party has significant grassroots support through connections between local politicians and businesses. Therefore, this recall effort pitted civil society activists against the KMT's local mobilization capacity.

In all of the July 26 elections, the recall motions failed: they either failed to achieve the required turnout threshold of 25 percent of eligible voters in the district, or received more "no" than "yes" votes (or both).

The Likely Future Course of Taiwan's Domestic Politics

The outcome of the recall efforts has significant implications for the balance of power in Taiwan's domestic politics. Although there is another recall election targeting seven KMT legislators on August 23, the main recall effort targeting 24 KMT legislators has been decided, and the August 23 elections will most likely not change the balance of power in the legislature. The result of the July recall elections means that the KMT/TPP coalition will almost certainly look to press its majority in the LY and continue to advance its agenda. This will most likely mean efforts to expand the powers of the LY at the expense of the Executive Yuan (EY, 行政院). For President Lai Ching-te (賴清德), this means that compromise with the KMT/TPP is essential. In order to govern Taiwan effectively, the EY will need to work closely with the KMT and TPP on major policy decisions, such as breaking the deadlock in the Constitutional Court, and resolving conflicts over defense spending and other budgetary legislation.

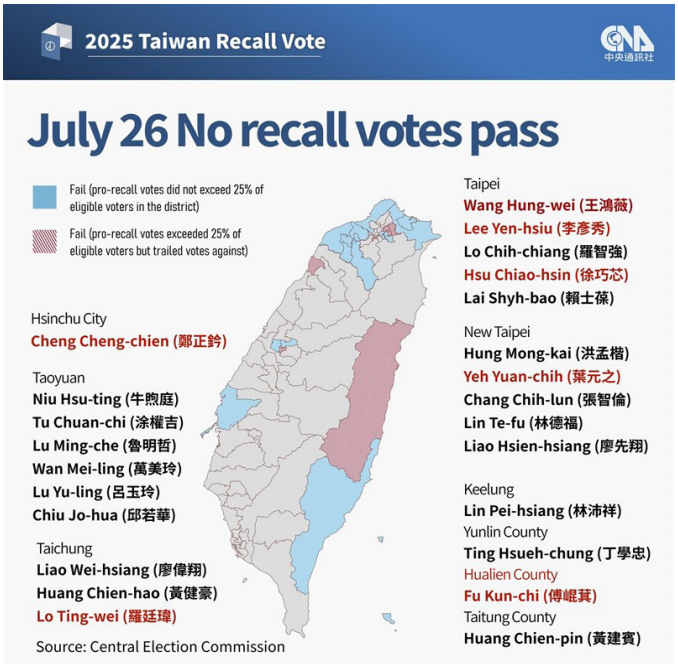

Image: Results of the July 26 recall votes, by district. (Image source: CNA)

The recall campaign also revealed limitations in the DPP's political messaging. Throughout the recall effort, the slogan "反共護台," which means "oppose communism, defend Taiwan," was prominently used to promote the idea of resisting Chinese influence and defending Taiwan's sovereignty. This slogan indicates how the DPP framed the recalls as a China issue. However, that message did not resonate with voters. While these themes remain central to how a majority of Taiwanese see their identity, voters in the 2024 election had already endorsed that position by electing a DPP president, President Lai, while also electing a legislature wherein the opposition party won the most seats. The 2024 election results reflected that Taiwanese voters wanted checks and balances, rather than reflecting disapproval of the DPP's China policy. With the local elections coming up in 2026, the DPP may want to shift its messaging from cross-Strait issues towards domestic issues such as the economy, energy policy, and housing. In many ways, the DPP has already won the China argument by winning three consecutive presidential elections; the 2026 local elections will be a debate on how the Taiwanese government can deliver on the concerns of its citizens.

Cross-Strait Dynamics

During the last presidential campaign cycle in Taiwan, China repeatedly framed Lai Ching-te as a dangerous "separatist." This contributed to heightened cross-Strait tensions in the lead-up to the 2024 election, with China warning that Lai's presidency could bring instability to the region. Despite these concerns, Lai was elected president, marking the third consecutive DPP administration.

Accordingly, results of the recent recalls may contribute to a short-term calming of cross-Strait tensions. With the July recalls having failed to oust any KMT legislators in the LY, and with both the EY and the LY needing to negotiate on key national policies, this may cause China to view Taiwan's internal political dynamics as a check on Lai's ability to pursue a more assertive stance on sovereignty issues. Nevertheless, China is unlikely to ease pressure on Taiwan. It will most likely continue its campaign of coercion through diplomatic isolation, military exercises, and political warfare aimed at undermining Taiwan's international standing and internal cohesion. In this context, cross-Strait relations will remain cold, shaped by a combination of a divided government in Taiwan and Beijing's strategic calculus.

The main point: The Taiwanese public has spoken: none of the 24 KMT legislators who were up for recall were removed from office. The results suggest that while Taiwan's civil society remains strong and vibrant, Taiwanese voters did not want to reverse the outcome of the 2024 elections. Instead, the results appear to reflect that the public wants President Lai to work with the opposition controlled Legislative Yuan on pressing domestic issues.

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Stuck Between a Rock and a Hard Place: Taiwan's Predicament in the South China Sea Disputes

By: Clare McKendry

Clare McKendry is a second-year Ph.D. Candidate in the Department of Political Science at the University of Waterloo, Ontario, Canada. Specializing in International Relations and East Asian security, territorial and maritime disputes, her Ph.D. dissertation research examines how Taiwan defines and defends its interests and claims in the South China Sea.

Introduction

Situated between the Gulf of Tonkin to the northwest, the Taiwan Strait to the northeast, and the Sulu Sea to the southeast, the South China Sea (SCS) borders several East and Southeast Asian countries. As the world's most immense sea at 3.5-million square kilometers (about twice the size of Alaska), the South China Sea is a vital maritime trade route and sea line of communication (SLOC) on which many Asian nations and extra-regional powers are heavily dependent. Great resources are at stake in the region: untapped natural gas and oil deposits underneath the seabed; a thriving fishing industry accounting for more than 12 percent of the world's fish catch; and over 200 islands, islets, and rock features that pose strategic military significance for intra- and extra-regional powers.

More pressingly, the South China Sea has transformed from an "outlier sea whose ownership was not clear and for that reason did not attract much attention" [1] to a hotspot for

regional tensions in Southeast Asia due to a set of overlapping territorial and maritime claims between the People's Republic of China (PRC), the Republic of China (ROC), Vietnam, Malaysia, Indonesia, Brunei, and the Philippines. These disputes are further complicated by differing historical records, interpretations of international maritime law (namely the United Nations Convention on the Law of the Sea or UNCLOS), economic ambitions, and strategic and military considerations. In the last two decades, there have been numerous collisions, dangerous encounters, and standoffs between claimant states. Indeed, even extra-regional powers conducting reconnaissance missions or Freedom of Navigation Operations (FONOPs) have had run-ins in the South China Sea, particularly with the Chinese Coast Guard (中國海警局) and its various military entities.

But how does Taiwan, a *de facto* state for all intents and purposes, fit into the South China Sea disputes?

Surprisingly (or not), government officials, news commentators, and academics alike have often neglected Taiwan's role in the South China Sea even though its forces occupy the largest island in the region, Itu Aba (太平島), and has arguably held its claim over the region for the longest out of surrounding states. Amid rising geopolitical tensions across the globe, the SCS has become a flashpoint that may serve to destabilize the region, hampered by an unwillingness among relevant actors to resolve the South China Sea disputes once and for all.

This article gives a brief overview of the extent of Taiwan's involvement in the South China Sea disputes. It situates Taiwan front and center in the disputes and examines how it has sought to defend its interests in the region despite its complicated international status. I argue that the international community's dismissal of Taiwanese ideas on dispute-resolution in the South China Sea is no longer a feasible option as tensions worsen. Rather, by considering Taiwan's previous efforts to shelve territorial and maritime disputes in the nearby East China Sea, we can unearth the foundations for a common ground through which to resolve the SCS disputes.

How Has Taiwan's Role in the Disputes Evolved?

The historical record plays a major role in understanding how any given dispute starts, why it started, and how it might be resolved. While this article does not provide an analysis of this history, nor does it examine the validity of competing archives or records, it does mention to some extent, various events and encounters in the region. The PRC has claimed that Chinese fishermen's use of the waters and islands as early as 200 B.C. legitimizes its "historic rights" claims, first introduced by the Chinese Communist Party (CCP, 中國共產黨) under Mao Zedong (毛澤東) in the early 1950s.

On December 1, 1947, the Kuomintang (KMT, 國民黨) government under Chiang Kai-shek (蔣介石) first demarcated Taiwan's claims to the South China Sea and released the *Location Map of the South China Sea Islands*. The Nationalists fled to Taiwan during the civil war with the CCP in 1949 but did not establish a presence in the Spratlys for over a decade despite having claimed sovereignty over them. [2] While the United States still recognized the Republic of China (Taiwan) after WWII, several US allies including those in the North Atlantic Treaty Organization (NATO) had gradually recognized the PRC by 1956. The ROC faced more challenges to its sovereignty when a Filipino mariner Tomás Clomá declared Itu Aba for himself as Free Territory of Freedomland in May of the same year. Taiwanese garrisons occupied Itu Aba in July 1956 and have remained there ever since. Taiwan would eventually lose its position as the "only legitimate and lawful representative of China to the United Nations" with UN Resolution 2758 in 1971, as more countries began to normalize their relations with the PRC.

Image: A photo of Itu Aba island taken by the National Aeronautics and Space Administration (NASA). (Image source: Wikimedia Commons.)

After a series of regional skirmishes between Vietnam, the PRC, and the Philippines, the Indonesian and Canadian governments (under the auspices of the Canadian International Development Agency [CIDA)], held workshops on managing potential conflict in the South China Sea disputes (also referred to as the "SCS Workshop series"). [4] The workshops got off to a challenging start as they did not originally include Taiwanese participation given the PRC's resistance to any frameworks that would imply recognition of Taiwan as a sovereign state. Later years of the workshop did include Taiwan, though its contributions were limited. For example, both Taipei and Beijing attended a 1991 workshop on the condition that issues related to sovereignty over the islands were not to be raised. [5] Owing to the "One-China" principle, Taiwan has been prevented from sponsoring technical working group meetings on legal matters, marine scientific research, and resource development among other issue areas as it pertains to the SCS disputes. [6] And while the SCS workshops ultimately ceased—as CIDA halted funding sometime in the early 2000s—they can be viewed as a success in that they did manage to get all South China Sea claimant states to convene for a variety of discussions.

In 2012, China and the Philippines had a ten-week stand-off in the disputed Scarborough Shoal. In a good-faith gesture, the Philippines withdrew from the shoal after a mutual withdrawal was reportedly negotiated by the United States. China was expected to do the same, but reneged [7] and began to deny the Philippines Navy and fishermen entry to the area.

After high-level political talks between the two failed, the Philippines invoked Article 287 and Annex VII of the 1982 UNCLOS to take China to an international tribunal. Taiwan, like China, came out against the Philippines' case, but it was neither consulted on, nor invited to partake in the arbitration. Despite being shut out from the case, Taiwan's government under former President Ma Ying-jeou (馬英九) made significant strides to maintain relevance for its position on the disputes. In late January 2016, Ma visited the disputed Itu Aba island to reaffirm Taiwan's sovereignty and commitment to the principles outlined in his South China Sea Peace Initiative (SCSI) that was proposed a year prior.

Ma invited the five presiding arbitrators, international journalists and scholars on international law and political science to visit Itu Aba to bring greater attention to the island, and continued advocating for the South China Sea Peace Initiative amid the arbitration case.

Unfortunately for Taiwan, the panel of arbitrators did not respond to the Ma's request to visit Itu Aba. Such a gesture was also met with discontent from partners such as the Philippines and the United States, which called Taiwan's actions "extremely unhelpful" in resolving the disputes. In 2016, the tribunal ruled largely in favour of the Philippines but went a step further in designating Itu Aba as a rock feature and not an island under UNCLOS Article 121(3), based on the judgement that Itu Aba is unable to sustain human habitation or economic life of its own.

While the SCSI failed to garner support among claimant states, the Taiwanese government has had some success with its initiatives in the nearby East China Sea to resolve similar disputes. On April 10, 2013, Taiwan and Japan signed a fisheries agreement after 17 years of intermittent negotiations. The Agreement delineates broad fishing zones of 1,750 square miles near the Diaoyutai/Senkaku Islands where Taiwan and Japanese fishermen can operate freely and includes no references to the sovereignty disputes. [8] While the implementation of the Agreement has not resolved all tensions between Taiwanese and Japanese fishermen, it serves as a stepping stone for seeking to reduce tension in the region without compromising maritime claims of other claimants.

In the post-arbitration era, discussions revolving around Taiwan's claims and interests in the South China Sea have largely dissipated. On the academic front, analyses of Taiwan's position on the disputes are largely retrospective in nature and concern the policy differences between the Ma Ying-jeou and Tsai Ing-wen (蔡英文) Administrations. The consensus among the academic and policy community is that Ma took bigger and bolder steps in asserting Taiwan's sovereignty claims to the region, such as through his promotion of the South China Sea Peace Initiative. [9]

Where Are We Now?

Over half a century has passed in this modern phase of SCS disputes, yet we are no closer to a resolution. The *Philippines v. China* arbitration case—and its recent ninth anniversary—appears to be the only substantial milestone in addressing a variety of issues that plague the region. Moreover, much scholarly work, news headlines, and commentary remain preoccupied with examining the behavior of the PRC, Vietnam, and the Philippines to the detriment, and ultimately erasure of Taiwan's claims. As tensions continue to circulate amongst claimant states, Southeast Asia finds itself at a crossroads in confronting what it perceives as PRC aggression in the region. This comes on the heels of renewed clashes between China and the Philippines in and around the Scarborough Shoal. And in late June, the Chinese Coast Guard carried out a large military civilian rescue drill off the disputed Woody Island.

Taiwan presents a special case study as its minimal international recognition, and lack of signatory status to UNCLOS fundamentally complicate its sovereignty claims to the South China Sea. The Taiwanese government has, however, flagged its interests in settling the disputes between claimant states through its attempts to appeal to the international community and institutions it is shut out from. [10] The seemingly intractable nature of the South China Sea disputes should prompt states to reconsider Taiwan's position and ideas on how to manage potential conflict in the region.

The main point: The international community and Asian countries continue to exclude Taiwan as a legitimate actor and claimant in the South China Sea disputes. As regional tensions persist, intra- and extra-regional states should reconsider Taiwan's position on the disputes and ideas on how to resolve them.

[1] Leszek Buszynski and Do Thanh Hai, eds., *The South China Sea: From a Regional Maritime Dispute to Geo-Strategic Competition*, 1st ed. (Routledge, 2019), 1–2, https://doi.org/10.4324/9780429331480.

[2] As with many islands, rock features, and reefs in the South China Sea, various claimant countries have their own names for these locations. For example, while China and Taiwan (ROC) refer to it as Taiping Island (or Taiping Dao) it is largely known as Itu Aba Island.

[3] Rodolfo Severino, *Where in the World Is the Philippines? Debating Its National Territory* (S.l.: Institute of Southeast Asian Studies, 2011), 79.

[4] Yann-Huei Song, "Cross-Strait Interactions on the

South China Sea Issues: A Need for Cbms," *Marine Policy* 29 (July 7, 2004): 269–70, https://doi.org/10.1016/j.marpol.2004.05.001.

[5] See previous citation.

[6] Snyder, Scott, Brad Glosserman, and Ralph A. Cossa. "Confidence Building Measures in the South China Sea." *Pacific Forum CSIS: Issues & Insights*, nos. 2–01 (August 2001): 15.

[7] Michael Green et al., *Countering Coercion in Maritime Asia: The Theory and Practice of Gray Zone Deterrence*, 1st ed, CSIS Reports (Lanham, MD: Center for Strategic & International Studies, 2017), 117.

[8] U.S.-China Economic and Security Review Commission. *2013 Annual Report to Congress*. Report. United States Congress, (2013): 331.

[9] Dennis V. Hickey, "Continuity and Change: Ma Ying-Jeou, Tsai Ing-Wen and the Dispute in the South China Sea," *J. Territorial & Mar. Stud.* 5 (2018): 77–78.

[10] Dana S. Trif, "Negotiating 'Access' to the International 'Rules-Based Order': Taiwan's South China Sea Policy," *The Pacific Review* 37, no. 3 (May 3, 2024): 649, https://doi.org/10.1080/09512748.2023.2206160.

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Ghost Coalitions: How the KMT-TPP Alliance Can Inform Taiwan's Political Future

By: Tracy Weener

Tracy Weener is a Summer 2025 intern at the Global Taiwan Institute.

There is safety in numbers—such are the rules of the game in Taiwan's unconventional coalition parliament. Not only is Taiwan navigating a divided government for just the second time in its history, but the most recent election cycle also marks the first occasion since 2004 that the Legislative Yuan (LY, 立法院) lacks a majority party. Coalition building has therefore emerged as a vital electoral strategy in Taiwan's current political landscape, from adapting to the polarized outcomes of a rare three-party competition in the 2024 presidential and legislative elections to sparking cooperation and condemnation alike during the unprecedented 2025 "Great Recall" (大罷免) movement.

Although the short-lived proposal for a joint 2024 presidential ticket between the Kuomintang (KMT, 國民黨) and the Taiwan's People's Party (TPP, 民眾黨) can serve as a "cautionary tale" of overzealous collaboration, this informal alliance between the island's main opposition parties is actively reshaping Taiwanese politics. In the wake of the initial recall election results, the growing KMT-TPP coalition will likely continue to transform Taiwan's domestic affairs and the future of US-Taiwan relations.

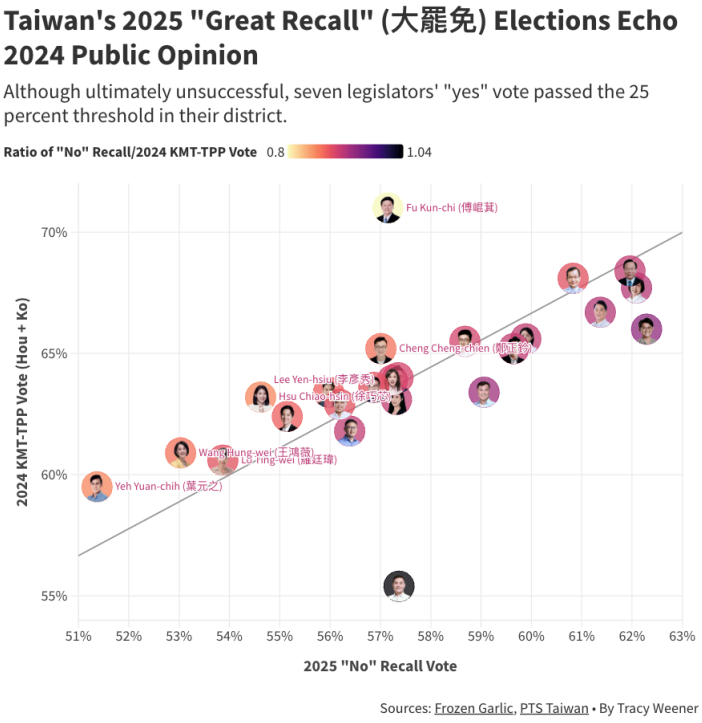

Image: The recall results on July 26, 2025, echo the public's majority support for the KMT's Hou Yu-ih and the TPP's Ko Wen-je in the 2024 Taiwanese presidential election. (Interactive image created by author)

The evolution of inter-party alliances offers important lessons regarding novel political strategies and shifting public support within Taiwan's evolving opposition party ecosystem. Against the backdrop of the July 2025 recall campaign outcome, this article will examine the implications of the KMT-TPP coalition for Taiwan's political future in the context of the upcoming 2026 local and 2028 general elections.

The Rise and Fall of Third Parties: The Political Underpinnings of Taiwan's 2024 Election

After nearly four decades of two-party dominance, the rise of viable third-party contenders in 2024 set the stage for coalition building. In Taiwan's political history, party coalitions are not unheard of, but they often pose considerable risks to the underdog. For instance, the People's First Party (PFP, 親民黨) ran an unsuccessful joint presidential ticket with the KMT in 2004 against the DPP's Chen Shui-bian (陳水扁). Multiple "Third Force" (第三勢力) political parties also emerged out of the 2014 Sunflower Movement, including the New Power Party (NPP, 時代力量), the Social Democratic Party (SDP, 社會民主黨), and the Taiwan Statebuilding Party (TSP, 台灣基進). The NPP has been largely regarded by voters as a "small Green" party in the DPP's shadow due to their highly consistent policy agendas. Making matters worse, NPP politicians faced public scandals and an identity crisis over whether to endorse former President Tsai Ing-wen (蔡英文) or their former leader Huang Kuo-chang (黃

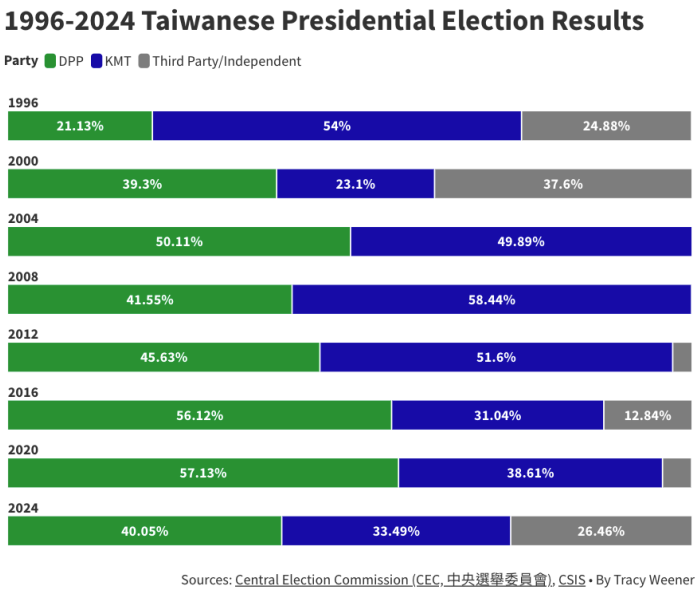

Image: Taiwan's presidential election results from 1996 to 2024 visualized by party, with notable resemblance between the plurality victories in the 2000 and 2024 elections. (Interactive image created by author)

國昌) in the 2020 election. That same year, the TPP overtook the NPP to become Taiwan's third-largest party.

Founded in 2019 by former Taipei City Mayor Ko Wen-je (柯文哲), the TPP distinguished itself from the DPP and the KMT for its unique flavor of pragmatism. Notably, the party attracted ample young voter support for its focus on economic "bread-and-butter" concerns. Had the 2024 election consisted solely of voters aged 20 to 29, it is estimated that TPP Chair Ko Wen-je would have won the presidency. This surge in support was amplified by several factors: growing discontentment with establishment parties, rising "pro-status-quo" cross-Strait attitudes among Taiwan's younger generation, and Ko Wen-je's popularity on social media platforms such as Instagram and TikTok.

In the lead-up to the 2024 race, negotiations to officiate a KMT-TPP "marriage" involved Ko Wen-je, the KMT's Hou Yu-ih (侯友宜), former President Ma Ying-jeou (馬英九), KMT Chair Eric Chu (朱立倫), and independent Terry Gou (郭台銘), who later withdrew from the race. Proposed on November 15, 2023, a KMT-TPP joint presidential ticket between Hou Yu-ih and Ko Wen-je offered Taiwan a path to establishing a majority "Blue-White" alliance (藍白合) and changing cross-Strait relations. However, before the Taiwanese electorate could weigh in at the polls, the unity ticket imploded on live television mere days after its announcement. While such a joint ticket posed a serious challenge to the incumbent Democratic Progressive Party (DPP, 民進黨)—which was projected to capture only a plurality of votes—no final agreement was reached on whether the KMT or TPP candidate would run for president amid clashes over polling data. On November 24, both parties went their separate ways, each registering their candidates individually for the 2024 election.

A Bird's-Eye View of the Aftermath of the 2024 Taiwanese Presidential and Legislative Elections

On January 13, 2024, as the world watched one of the first major contests in the biggest election year in human history, DPP candidate and former Vice President Lai Ching-te (賴清德) won 40.05 percent of the Taiwanese electorate's support, marking the party's third consecutive presidential victory. In second place, the KMT's Hou Yu-ih secured 33.49 percent of the vote, followed by 26.46 percent for the TPP's Ko Wen-je. As Taiwan's first election since 2000 to be won without a majority, the outcome of the 2024 election reveals a more complex, pluralistic story—one that is still unfolding today.

Broadcast in the news and publicized by the DPP, the implosion of the KMT-TPP joint presidential ticket haunted opposition prospects in the lead-up to Lai Ching-te's victory. However, the DPP ended up losing its majority presence in the legislature for the first time since 2004, dropping to 51 out of 113 seats while the KMT and TPP increased their representation to 52 and 8 seats, respectively. With both the DPP and KMT lacking a clear majority of their own, the TPP ascended to a new seat of power as the legislative "kingmaker."

Despite the party's newfound influence in the legislature, TPP presidential hopeful Ko Wen-je experienced a swift and severe "fall from grace." Detained since September 5, 2024, Ko is facing a potential sentence of over 28 years in jail on corruption charges. In addition, suspended Hsinchu City Mayor Ann Kao (高虹安)—previously the first TPP-elected municipal leader and one of the party's "most high-profile rising stars"—was found guilty of corruption in July 2024. Nevertheless, despite problematic leadership challenges, the TPP moved to take advantage of its control of a "critical voting bloc" in the legislature through an informal coalition with the KMT.

In May 2024, the KMT-TPP alliance passed controversial amendments to the *Legislative Yuan Exercise of Official Powers Law* (立法院職權行使法). Many voters were unhappy with these reforms, serving as the catalyst of the 2024 Bluebird Movement (青鳥行動), which amassed over 100,000 protestors in Taipei on May 24. Emerging from the Bluebird Movement, the recall campaign attempted to remove at least six opposition lawmakers to flip the legislative balance of power. In advance of the "Great Recall" elections, pro-recall demonstrators took to the streets to protest a perceived abuse of power by the legislature. Meanwhile, a whirlwind of rallies and countermovements took place. In one notable example, the opposition parties held an anti-recall rally in front of Taipei City Hall to support the impacted 24 KMT lawmakers and Ann Kao on July 5, 2025, with pro-recall groups organizing their own action on the same day.

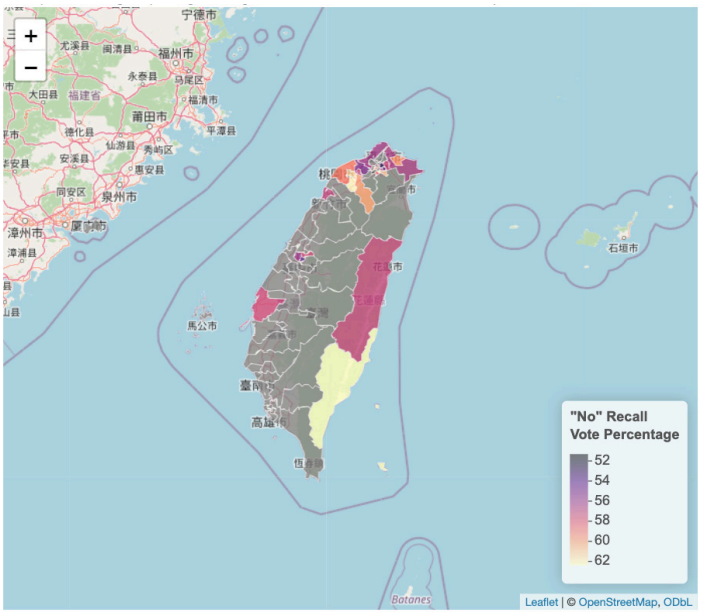

Image: While none of the KMT legislators were ultimately recalled, shaded districts in the above map display how "no" votes differed on July 26, 2025, where purple (yellow) represents a legislative district with a higher vote share (i.e., less [more] support for the lawmaker). (Interactive image created by author, with data sources Frozen Garlic and Taiwan Atlas)

"Without the Lips, the Teeth Will Get Chilled" (唇亡齒寒): Lessons from the 2025 Recall Elections

The historically unprecedented "Great Recall" movement turned 2025 into a "de facto campaign year," as characterized by journalist Brian Hioe (丘琦欣). Yet, the July 26 elections failed to remove a single lawmaker from office. While interpretations vary, Dr. Nathan Batto's *Frozen Garlic* election blog found that the results "did not show any evidence of a significant shift in public opinion"; rather, "in general, voters reaffirmed" their decisions from 2024. Previously, a July 14 survey by the Taiwan Public Opinion Foundation (TPOF, 財團法人台灣民意基金會) found that opposition to the recalls outnumbered support by a six percent margin nationally and a greater 11 percent within the recall districts.

In addition to popular support, voter turnout represented another crucial element in the recalls. With an actual turnout rate of 56.2 percent, the KMT and TPP have been re-energized by the recall outcome, but this does not necessarily mean that the parties intend to work together indefinitely. The opposition's deepened coordination during the recall may have laid the foundation for future Blue-White cooperation, but whether this common ground is sufficiently stable remains an open question. Lastly, whether the DPP concludes that they simply did not mobilize enough, or that they actually "should have done less" in the recall movement, will likely shift the party's rhetoric and future campaign efforts moving forward.

In the meantime, recent amendments supported by the KMT-TPP coalition to the *Civil Servants Election and Recall Act* (公職人員選舉罷免法) and the *Constitutional Court Procedure Act* (憲法訴訟法, CCPA) have escalated tensions to the point of a "constitutional crisis." By blocking confirmation of seven grand justices nominated by President Lai for a second time in July 2025 as well as enacting budget cuts and revisions to the *Act Governing the Allocation of Government Revenues and Expenditures* (財政收支劃分法), the opposition parties have coalesced around contesting the DPP's legislative agenda and will likely continue in the wake of the recalls.

Policy and Cross-Strait Implications of a KMT-TPP Alliance

Analysts are hesitant to predict that the recall results reflect either a widespread endorsement of the KMT's cross-Strait policies or a shift away from the status quo. One perspective suggests that voters can hold "Taiwan-centric" views while simultaneously rejecting "fearmongering" related to Beijing. The will of the moderate swing electorate was crucial in this vote—as it was in 2024 and throughout Taiwan's political history. According to TPOF monthly surveys, approximately 27 percent of respondents identified as independent in July 2025, an increase from 22 percent in January 2024. While the DPP's re-election to the presidency may have affirmed public support for its cross-Strait policy, its failure to capture the legislature through the 2024 elections and 2025 recall votes signals some Taiwanese voters' desires for executive oversight by the KMT-TPP majority coalition.

Regardless of the outcome of the second round of recalls slated for August 23, gridlock will likely persist in Taiwan's divided government. Until 2028, President Lai must negotiate with an opposition-controlled parliament, which could have substantial implications for Taiwan's security. Some anticipate that the KMT will interpret the recall results as a mandate to advance its legislative priorities, notably toward defense spending. For example, researcher Thomas Shattuck projects that the Trump Administration "will likely continue to pressure Taipei" to boost defense spending above three percent of its GDP, even though such a spending increase could be blocked if the opposition parties maintain their stance.

If President Lai cannot raise defense spending, Taiwan may need to pause some of its military programs, including its indigenous submarine plans, to prioritize asymmetric defense. The DPP's ability to get the KMT and TPP to compromise on their competing visions for Taiwan's defense and foreign policy budget will be paramount to assuage US concerns over Taiwan's security. Otherwise, a failure to increase the budget could undermine perceptions of Taipei's commitment to defense in the eyes of Washington.

Potential Impacts on the 2026 Local and 2028 General Elections

Will "Blue-White" cooperation endure? The recall elections represent a significant step forward for the informal KMT-

TPP coalition, but the 2026 local elections will be especially decisive for the TPP's longevity. The opposition faces two main strategic choices: "moderate their policies and rhetoric" to broaden appeal, or go "scorched earth" and double down on their resistance to the DPP. If the DPP faces backlash in the 2026 local elections due to its recall efforts, this challenge could present a prime opportunity for the KMT-TPP alliance. Even if public opinion closely resembles that of the last elections in January 2024, Taiwan's major parties will likely reconsider their political strategies to maximize voter appeal and court civil society before the next fast-approaching electoral race.

Coordinating nominations in future elections is essential to the TPP's long-term success, as indicated by political scientist Kharis Templeman. Mobilization efforts by KMT Taichung Mayor Lu Shiow-yen (盧秀燕) and current TPP Chair Huang Kuo-chang—who confirmed his candidacy in 2026 for New Taipei mayor on August 11, facilitating dialogue with the KMT—were among those crucial to the outcome of the recalls. A Lu-Huang partnership is gaining momentum: sources say Lu, a rising figure among the KMT's potential candidates for the 2028 race, may seek to work with Huang as a running mate to consolidate non-DPP voters. According to columnist Courtney Donovan Smith's (石東文) deep dive on Lu's unorthodox political strategies, not only has Lu historically courted TPP figures such as Ko Wen-je, but her camp also believes that working in coalition with the TPP "will be key" to winning in 2028. Her centrist appeal could attract the support of moderate swing voters—the very same group who was decisive in the recalls. If she decides to run, Lu could cement her control over the KMT by winning the upcoming October 18 KMT leadership election, in which polls position her as the favored candidate among both KMT and TPP voters.

The November 2023 KMT-TPP presidential ticket may have failed, but in light of Taiwan's history of political alliances, coalitions are always on the table. While continued KMT-TPP collaboration is contingent upon resolving differences in nominating new leadership and coordinating political strategy, valuable insights can be gained from recent events. One easy lesson: consider cutting the live video feed next time.

The main point: In anticipation of the 2026 local government and 2028 general elections, the 2025 "Great Recall" represents a significant step forward for the KMT-TPP alliance, which has the potential to overcome the ghosts of failed coalitions and marginalized third parties in Taiwan's political history. Emerging from the unique circumstances of the 2024 election, opposition party partnerships can play a pivotal role in the future of inter-party cooperation in Taiwanese domestic policymaking and influence the course of US-Taiwan relations.

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