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Explaining Taiwan's Chinese Mainland Policy Change

A Punctuated Equilibrium
Perspective

Wenxing Zhou

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To my family

FOREWORD BY GANG LIN

For many observers of cross-Taiwan Strait affairs, Taipei's policy toward the Chinese mainland is undoubtedly an extremely important—if not the most important—key factor determining peace or war between the Chinese people on the two shores of the narrow strait as well as the island's future: To be further attaching to the Chinese mainland or detaching from it. While the issue of war or peace is more eyes-catching for the international community, it is after all pending on Taiwan's political choice between unification and independence for the future, given Beijing's strong position on keeping Taiwan within its territorial orbit and political control, *de jure* at the least and *de facto* at the best. As Wenxing Zhou sharply points out in his monograph *Explaining Taiwan's Chinese Mainland Policy Change: A Punctuated Equilibrium Perspective* (Palgrave Macmillan, 2026, *Explaining Taiwan's Chinese Mainland Policy Change* hereafter), Taipei's mainland policy has oscillated along the spectrum between unification and independence over the past 76 years, displaying a punctuated-equilibrium pattern: extended periods of stability punctuated by abrupt shifts. One may recall that during the Chiang Kai-shek and Chiang Ching-kuo periods, when Taiwan was under the *Marshal Law* between 1949 and 1987 (for 38 years), talking about Taiwanese independence, namely separating Taiwan from the Chinese mainland, was a political taboo on the islands. Ironically, after another 38 years, unification with the mainland has become a topic so unpopular on the islands—if not a new taboo under the so-called “green terror” of the

Anti-Infiltration Act (反渗透法). Such an evolution has been accompanied by the increasing civil exchanges across the Taiwan Strait, Beijing's growing power and eagerness to get the islands back, and U.S. stronger façade of maintaining Taiwan's security and support for its international activities.

Explaining Taiwan's Chinese Mainland Policy Change attempts to unveil the theoretic puzzle why the Kuomintang (KMT, 中国国民党) and the DPP (民主进步党) together with their respective pan-blue and pan-green camps have oscillated between the direction of unification or independence, displaying what Zhou calls a punctuated-equilibrium pattern: extended periods of stability punctuated by abrupt shifts. While a broad public consensus continues to favor maintaining the *status quo* rather than rushing toward unification or independence, every electoral cycle and power turnover have generated new adjustments in policy emphasis, discourse, or practice. Political interactions among the two main parties and the public opinion are shaped by external environment, both the People's Republic of China (PRC) and the United States have their high stakes in Taiwan's domestic politics. For Beijing, the Taiwan issue originates from the continuation of the Chinese civil war. It is just because of American military re-intervention and eco-political support in the early beginning of the Korean War that such a historical problem failed to be resolved in the due process, and China's complete unification will surely be finished in the progress of its rejuvenation. For the United States, Taiwan was an expedient card against the Communist China during the heyday of the Cold War. Even though when the two countries have engaged each other to counterbalance against an aggressive Soviet Union, Washington insisted on maintaining semiofficial relations with Taipei. In the post-Cold War world, Washington continues to play the Taiwan card, only played less widely during its anti-terrorist campaign when Beijing's cooperation was desired. As the smallest player in Washington-Beijing-Taipei triangular games, Taipei's maneuvering space is limited, even though it sometimes plays a dangerous game of "one tail wagging the two dogs," potentially drawing the two nuclear-armed superpowers—China and the United States—into a catastrophic war that neither side seeks, as the 1995–96 Taiwan Strait crisis has highlighted. Fortunately, no big war has erupted in the Taiwan Strait over the past seven decades despite multiple crises and moments of brinkmanship. This gap between widespread expectations and historical

outcomes—between theoretical prediction and lived reality—has inspired Zhou’s studies in the less explored field.

The central questions *Explaining Taiwan’s Chinese Mainland Policy Change* seeks to address are: Why do periods of relative stability alternate with sharp policy shifts? How do domestic electoral dynamics and international triangular interactions jointly shape Taiwan’s policy space? To answer these questions, Zhou develops a two-level punctuated-equilibrium theory of Taiwan’s mainland policy by employing punctuated-equilibrium model of policy change, two-level game theory of political science, and strategic triangular model of international relations.

While strategic triangular model was originated in the sphere of international relations, it can be carefully adapted to describe and predict the triangular interaction among the United States, the Chinese mainland, and Taiwan, simply because Taiwan, short of statehood, still has its autonomy in developing external relations with other players in the world in general and the United States in particular. The *quasi*-alliance between Washington and Taipei reveals strategic asymmetry between them: While the United States does not want to be entrapped into a war with Beijing, Taiwan is always concerned about American abandonment of the islands. Such a strategic suspicion may have contributed to the desperate efforts of the DPP administration under Chen Shui-bian pushing for *de jure* independence via referenda and constitutional engineering, which in turn has led partly to the fall of the first DPP administration, a troublemaker in the mind of some American policymakers. While the KMT’s returning to power under Ma Ying-jeou greatly eased American concern of be entrapped, the desirability and possibility of peaceful unification between the two sides of the Taiwan Strait were widely discussed among American academic and policy circles, leading temporally to the resurface of Taiwan abandonment rhetoric between 2009 and 2014 within the Beltway. On the other side of the Pacific Ocean, Beijing disregards itself as part of the triangular structure in dealing with both Washington and Taipei normatively, as the Taiwan issue is defined as a pure domestic one. Empirically, however, in making policy toward Taiwan, Beijing has always taken the American factor into account. For example, during the Chen Shui-bian administration, Beijing had successfully co-managed strait crisis with the Bush administration. In recent years, Beijing’s growing military pressure on Taiwan is clearly a function of the continuous upgrading of Taipei and Washington ties under both the Trump and Biden administrations.

In addition, the strategic triangular model is employed to observe party politics in Taiwan, another creative contribution of *Explaining Taiwan's Chinese Mainland Policy Change*. The term triangularity in this context does not suggest that Taiwan has a three-party system, even though Taiwan's electoral system either before or after the 2008 reform of legislative elections (predetermined in 2005) does leave a limited space for the third party and other smaller ones for survival, as the rise of the Chinese New Party, the People First Party, and the Taiwan Solidarity Union before 2008 and the New Power Party and Taiwan People's Party thereafter have suggested. Rather, Taiwan is featured by a two-party system since 1986, the third actor in Zhou's triangular analysis refers to the public that has no strong preference for the Blue or Green parties, including swing voters. Informed by traditional and social media, civil society is very active in shaping party politics in Taiwan. The typical examples are the 2005 Red Shirt movement against the corrupted Chen administration and the 2014 Sunflower movement against Ma Ying-jeou's policy towards the mainland. In a hindsight, one can say both movements have greatly contributed to the power turnover between the DPP and the KMT.

In brief, by tracing Taiwan's party politics and resultant mainland policy changes within the triangular structure at the domestic level and embedded it in the triangular structure at the external level, *Explaining Taiwan's Chinese Mainland Policy Change* have provided a horizontal and longitudinal framework to illuminate both continuity and rupture in Taipei's approach to Beijing over the past seven decades, demonstrating the interplay of domestic transformation and international context through two-level analysis. In doing so, *Explaining Taiwan's Chinese Mainland Policy Change* not only advances the field of Taiwan studies but also enriches wider scholarship on party politics, policymaking, regional security, and small actor vis-à-vis great powers in global politics.

As Zhou's doctoral supervisor when he studied in the School of International and Public Affairs at Shanghai Jiao Tong University, I am proud to witness his amazing academic achievement after graduation five years earlier. This book, developed from his doctoral dissertation with significant revision and timely updates of the new changes since 2020, is a must read not only for experts and policymakers in the sphere of Taiwan

studies, but also for scholars in comparative politics and international relations. It is a great honor of me to read this concise and rich monograph before it is formally published.

October 2025

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FOREWORD BY ROBERT S. ROSS

As the U.S.–China power transition has intensified, the Taiwan issue has emerged as the most likely source of twenty-first century great power war. For the Chinese leadership, Taiwan’s incremental movement toward *de jure* independence challenges China’s most critical national interest. For the United States, its 75-year commitment to the defense of Taiwan has encouraged a determination to resist Chinese use of force against Taiwan, whether the challenge to the *status quo* comes from Taipei or Beijing. In the context of heightened U.S.–China security competition, policy making in Taiwan and its independence diplomacy may well be the critical factor determining the course of U.S.–China relations.

In *Explaining Taiwan’s Chinese Mainland Policy Change: A Punctuated Equilibrium Perspective*, Professor Zhou Wenxing offers a timely and insightful understanding of the sources of variation in Taiwan’s mainland policy. The existing literature on Taiwan policy making underscores the importance of Taiwan identity and public opinion in informing partisan politics and leadership policy objectives. Identity and public opinion are important factors in Taiwan policy making, but Taiwan’s independence diplomacy making does not simply reflect the influence of competing domestic political interests. As Zhou persuasively argues, Taiwan public opinion and the parameters of Taiwan’s policy debates and the corresponding consequences for variation in Taiwan’s independence diplomacy reflect variation in U.S.–China relations and in U.S. and Chinese policy toward Taiwan.

Through an examination of the most important policy developments in post-1949 Taiwan's mainland policy, and the implications of Taiwan democracy for policy making, Zhou shows that the interplay between two distinct triangular dynamics shapes Taiwan policy making. U.S.–China–Taiwan international triangular dynamics, including variation in mainland coercive diplomacy and U.S. support for Taiwan, shape Taiwan's domestic triangle of public opinion, party politics, and leadership preferences regarding Taiwan's mainland policy. In particular, Zhou shows the interplay of U.S.–China–Taiwan relations with Taiwan domestic politics and its mainland policy from the leadership of Lee Teng-hui in the mid-1990s through the leadership of Lai Ching-te in the 2020s. Zhou's analysis thus underscores that ongoing U.S.–China competition in the twenty-first century will determine mainland and U.S. policy toward Taiwan, with implications for Taiwan's independence diplomacy and cross-strait tension.

Based on solid research and sophisticated analysis, *Explaining Taiwan's Chinese Mainland Policy Change* dispels preconceived assumptions concerning the immutable direction of Taiwan's mainland policy as a source of inevitable heightened conflict. The trend of growing "Taiwanese identity" and of declining "Chinese identity" contributes to enduring Taiwan resistance to unification with the mainland. Nonetheless, as Zhou well argues, identity politics can coexist with pragmatic public opinion, contributing to restrained Taiwan foreign policy.

Zhou's scholarship is not only important for understanding the sources of heightened conflict across the Taiwan strait and the prospects for war and peace. His scholarship is also important because it contributes to dispassionate scholarship and a common understanding to mainland–Taiwan relations on all sides of the cross-strait conflict. Mainland, Taiwan, and American approaches to the Taiwan issue frequently reflect the prevailing public opinion or a government's foreign policy advocacy in an author's homeland, rather than scholarly analysis. Zhou's scholarship is thus an important step toward the development of a common apolitical understanding on Taiwan, on the mainland and in the United States of public opinion and party politics in Taiwan and of the sources of cross-strait conflict and cooperation, thus expanding the potential for conflict resolution.

But Zhou's scholarship is more than a simply a nuanced analysis of Taiwan's policy making. As a case study of foreign policy making in a multi-party system, it also advances the theoretical scholarship on the

domestic sources of foreign policy. In the political science literature, the most prominent two-level game approach to the politics of foreign policy making examines how parochial leadership interests, reflecting the constraints of public opinion, can affect a state's international negotiating flexibility. Zhou's work extends this literature by showing that the influence of domestic politics on negotiating positions vary with changes in the international environment. Changes in a state's threat perception and security relationships affect public opinion, at times contributing to constraints or to opportunities in policy making, thus affecting international conflict and cooperation. Zhou's case study of Taiwan politics and policy making reveals that this linkage between international security and public opinion is critical for understanding the politics of policy making and leadership policy preferences not just in Taiwan but in multi-party systems generally.

The existing scholarship on Taiwan politics and Taiwan policy making is extensive. Nonetheless, *Explaining Taiwan's Chinese Mainland Policy Change* offers an important, original, and nuanced understanding of the multifaceted sources of Taiwan's mainland policy.

September 2025

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FOREWORD BY FENG ZHU

In recent years, the simultaneous deterioration of cross-Taiwan Strait relations and China–U.S. ties has become a key driver accelerating the unfolding of the world’s ongoing changes of a magnitude not seen in a century. Against this backdrop, understanding the logic behind Taiwan’s policy adjustments toward the Chinese mainland has emerged as an important topic in the fields of international relations, comparative politics, and area studies. In his new book entitled *Explaining Taiwan’s Chinese Mainland Policy Change: A Punctuated Equilibrium Perspective*, Zhou Wenxing, Associate Professor of School of International Studies at Nanjing University, offers a highly illuminating perspective on this complex theoretical and empirical question. Grounded in solid theoretical foundations and enriched with detailed empirical analysis, the book provides a rigorous and innovative framework for explaining the dynamics of Taiwan’s Chinese mainland policy evolution.

The book adopts the “punctuated equilibrium theory” as its core analytical framework, conceptualizing Taiwan’s policy toward the Chinese mainland as a dynamic process characterized by long-term stability interspersed with short-term disruption. By skillfully integrating theoretical concepts and analytical models from policy science and international relations, such as the two-level game theory and the strategic triangle model,

Dr. Zhou builds a bridge between macro-structural factors and micro-level decision-making behavior. This methodological innovation not only enhances our understanding of Taiwan's policy changes toward the mainland but also exemplifies the fruitful cross-disciplinary application of political science theories.

Through a systematic review of Taiwan's mainland policy under successive administrations since the 1990s, Zhou employs detailed data analysis and documentary evidence to uncover how institutional tensions within Taiwan's political system, partisan competition, public opinion pressures, and external structural conditions jointly shape policy adjustment processes. Particularly commendable is Zhou's efforts to go beyond the simplistic dichotomy of the "Blue" and "Green" political camps or the "unification vs. independence" discourse. Instead, he delves into the mechanisms of policy agenda formation and, through the analytical lens of "stability-punctuation-restabilization," reveals the complex interactions among political cognition, policy windows, and contingent events, which enables readers to gain a more comprehensive understanding of the cyclical fluctuations in Taiwan's policy toward the Chinese mainland.

Equally valuable is the author's commitment to academic neutrality and analytical rigor throughout the book. Rather than engaging in normative judgments or partisan interpretations, Zhou relies on empirical evidence and systematic theorization to advance a scientific and rational approach to the study of cross-Strait relations. For scholars, policymakers, and readers concerned with the future trajectory of cross-Strait relations alike, this book offers substantial analytical and practical value.

In sum, *Explaining Taiwan's Chinese Mainland Policy Change* is a remarkable work that combines theoretical depth with empirical richness. It is one of the few scholarly monographs—both in the Chinese mainland and Taiwan, as well as in the broader international academia—dedicated to analyzing the evolution of Taiwan's Chinese mainland policy. Situated at the intersection of area studies and public policy analysis, and incorporating the influence of the U.S. factor, the book also contributes meaningfully to the field of international studies. It not only enriches the intellectual landscape of cross-Strait research but also makes an original contribution to political science methodology. I am confident that the publication of this volume will further promote a deeper understanding

among scholars worldwide of Taiwan's political transformations and the evolution of cross-Strait relations, and will stand as a significant academic contribution in this field.

October 2025

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FOREWORD BY CHIH-CHIEH CHOU

I first came to know Zhou during his doctoral studies at Shanghai Jiao Tong University and have followed his scholarly journey ever since. I had the opportunity to witness firsthand his field research in Taipei, where his disciplined approach and empirical rigor left a strong impression. Over the years, I have watched him become one of the most promising younger scholars in international relations, regional security, and cross-strait affairs. This book reflects the intellectual maturity and analytical depth that have characterized his work: a careful combination of theory, history, and policy analysis, grounded in empirical detail and executed with conceptual clarity.

The core argument is straightforward but powerful. Taiwan's mainland policy, Zhou argues, is not a linear story of gradual evolution but one marked by long periods of stability interrupted by sharp turning points. These critical junctures occur when domestic and external forces—such as electoral realignments and shifts in U.S.–China relations—intersect, producing a recurring cycle of equilibrium, disruption, and recalibration. Zhou's “two-level punctuated equilibrium” framework is particularly insightful, capturing how domestic political competition, identity dynamics, and public opinion interact with geopolitical pressures from Beijing and Washington. By situating these processes within a coherent analytical model, he shows why Taiwan's policy trajectory often defies simplistic predictions.

The historical narrative that anchors this analysis is equally valuable. From the Cold War decades through democratization and the alternating administrations of Chen Shui-bian, Ma Ying-jeou, and Tsai Ing-wen, Zhou traces how internal and external conditions have repeatedly redefined the boundaries of Taiwan's strategic choices. He demonstrates how Beijing's coercive strategies—military modernization, legal instruments, and gray-zone tactics—have narrowed Taipei's maneuvering room, while U.S. policy has shifted from strategic ambiguity toward more visible forms of support. He also shows how leadership framing and party strategies have amplified or mitigated these pressures, explaining why some policy shifts proved fleeting while others reshaped the landscape for years.

The policy analysis that follows is pragmatic and balanced. For Taipei, Zhou calls for deterrence by denial, strengthened transparency, and carefully calibrated engagement. For Beijing, he advocates credible reassurance and moderation in coercive instruments. For Washington, he emphasizes pairing security commitments with crisis-management mechanisms. These recommendations share a common thread: widening the political and strategic space for all parties while minimizing risks of miscalculation.

I would like to add two observations that extend his arguments. The first concerns what I see as a structural trend toward the “de-Taiwanization” of the Taiwan question. In the past, cross-Strait dynamics were largely defined by the interactions of the two sides themselves, mediated by principles such as “no unification, no independence, no use of force.” That balance has been eroding. Increasingly, the agenda is shaped less by Taipei's own decisions and more by the rhythm of U.S.–China strategic competition. Military signaling, legislative initiatives, economic measures, and diplomatic moves are now often orchestrated outside Taiwan, with Taipei reacting rather than initiating. The effect is a steady narrowing of Taiwan's strategic space across political, security, and economic domains. This external dominance does not negate Zhou's two-level model but changes its emphasis: the external level has grown more decisive in determining when and how punctuations occur.

The second observation concerns public opinion in Taiwan, which is often oversimplified as a binary choice between unification and independence. In reality, the electorate comprises two overlapping coalitions. One opposes *de jure* independence but also rejects unification; the other opposes unification but hesitates to pursue *de jure* independence. Their common ground is a preference for maintaining the *status quo*—peace,

separate governance, continued exchange, and international space. This convergence reflects a society that is both risk-averse and committed to autonomy. It also explains why policy overreach in either direction—toward rapid political integration or formal independence—tends to trigger swift public pushback. This nuanced understanding deepens Zhou’s analysis and highlights the domestic constraints that policymakers must navigate.

Taken together, these trends—external “de-Taiwanization” and internal consolidation around a centrist *status quo*—reshape the strategic environment that Zhou so ably describes. They do not challenge his model but rather illustrate its continuing relevance, underscoring the need for policies that are both realistic and resilient: strategies that accept the limits of Taiwan’s agency while still seeking to expand its options, and approaches that work with public opinion rather than against it.

One of the book’s strengths is that it does not stop at diagnosis. It offers a clear typology of possible future scenarios—ranging from “Constrained Symbolism” to “Assertive Autonomy,” from “Stable Engagement” to “Fragile Balancing”—and outlines corresponding policy responses. These scenarios are not predictions but tools for planning, encouraging policymakers to think in terms of probabilities rather than certainties and to design flexible strategies that can adapt as conditions change. The underlying message is that even in a constrained environment, agency matters. Policies cannot eliminate risk, but they can shape its distribution and consequences.

This book is thus more than an academic exercise. It is a serious attempt to understand how Taiwan’s mainland policy has evolved, why it changes when it does, and what strategies might best secure its future. It neither romanticizes Taiwan’s position nor underestimates its significance. It presents a clear-eyed assessment of the challenges ahead while offering pathways for navigating them.

For readers approaching these issues for the first time, Zhou’s work provides a comprehensive and accessible map of a complex landscape. For those already immersed in the field, it offers fresh insights and a coherent framework for understanding the interplay of domestic politics and international structure. Most importantly, it equips policymakers, scholars, and citizens alike with the conceptual tools needed to think critically and strategically about one of the most consequential geopolitical questions of our time.

I commend this book to you as more than a study of Taiwan's mainland policy. It is a reflection on how small states navigate the pressures of great-power rivalry, how democratic societies balance identity and pragmatism, and how policy choices—however constrained—can still shape the future. It is a work of theory and history, but also of judgment, and it deserves a wide and careful readership.

Olympia, Washington
October 2025

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PREFACE

The Taiwan question (台湾问题)—often described as the most dangerous flashpoint with the potential to trigger armed confrontation between the People’s Republic of China (PRC) and the United States—has long commanded intense scholarly and policy attention. In today’s context of intensifying strategic competition between the two powers, debates over Taiwan have once again surged to the forefront of international discourse, dominating global media headlines and shaping academic discussions in the Chinese mainland, Taiwan, and far beyond.

While many analysts warn that the Taiwan issue could spark armed conflict, potentially drawing the two nuclear-armed superpowers—the PRC and the United States—into a catastrophic war that neither side seeks, the empirical reality is more complex. Despite multiple crises and moments of brinkmanship, no significant war has erupted in the Taiwan Strait in the more than seventy years since the issue first emerged in the late 1940s. This gap between widespread expectations and historical outcomes—between theoretical prediction and lived reality—remains underexplored in the literature.

As a direct stakeholder, the policy orientation of the Taiwanese authorities toward the Chinese mainland plays a pivotal role in shaping the triangular dynamic among Beijing, Washington, and Taipei. In particular, the mainland policy of the independence-leaning Democratic Progressive Party (DPP, 民主进步党) constitutes a critical variable influencing the likelihood of cross-Strait conflict. Yet, within the voluminous body

of Taiwan studies in English literature, surprisingly few works place this policy variable at the analytical core.

At its heart, Taiwan's mainland policy—the question of how to engage with Beijing—stands as one of the island's most consequential public policies, with far-reaching implications for the security and well-being of its 23 million people. Over the decades, this policy has oscillated along the spectrum between unification and independence, displaying a punctuated-equilibrium pattern: extended periods of stability punctuated by abrupt shifts. A further puzzle lies in why the Kuomintang (KMT, 中国国民党) and the DPP, together with their respective pan-blue and pan-green camps, have in recent decades shifted from their traditional positions and, in some respects, converged.

This monograph seeks to address this paradox of Taiwan's mainland policy: simultaneously stable and volatile. On the one hand, a broad public consensus continues to favor maintaining the *status quo* rather than rushing toward unification or independence. On the other, every electoral cycle, leadership transition, or external crisis seems to generate new adjustments in policy emphasis, discourse, or practice. The central questions, therefore, are: Why do periods of relative stability alternate with sharp policy shifts? How do domestic electoral dynamics and international triangular interactions jointly shape Taiwan's policy space? And what theoretical framework best explains this cyclical and punctuated nature of policy change?

This book—adapted and extensively revised from my doctoral dissertation, *A Study on Changes in Chinese Taiwan's Mainland Policy: A Theoretical Perspective of Punctuated Equilibriums*, submitted to Shanghai Jiao Tong University (SJTU) in May 2020—addresses these gaps. It focuses particularly on the past three decades, a transformative period beginning with Taiwan's democratic transition in the late 1980s that has since witnessed profound shifts in domestic politics, cross-Strait relations, and the global strategic environment.

To this end, I develop what I call a two-level punctuated-equilibrium theory of Taiwan's mainland policy. This framework synthesizes three complementary perspectives: the punctuated-equilibrium model of policy change, the strategic triangular model of international relations, and the two-level game theory of political science. Together, these theories identify the key domestic and external factors shaping Taiwan's mainland policy and explain the timing, direction, and magnitude of major shifts.

A second contribution of this book lies in its historical scope. By tracing Taiwan's mainland policy from the 1950s to the present, it situates contemporary developments within a long-term perspective. It follows critical junctures across multiple eras: the KMT's exclusive rule from 1949 to 1987; the democratic transition under Lee Teng-hui (李登輝); the leaderships of Chen Shui-bian (陈水扁), Ma Ying-jeou (马英九), and Tsai Ing-wen (蔡英文); and the current administration under Lai Ching-te (赖清德). This longitudinal study illuminates both continuity and rupture in Taipei's approach to Beijing, demonstrating the interplay of domestic transformation and international context.

Beyond combining theoretical innovation with empirical depth, the book contributes to broader debates in international relations. Taiwan serves as a critical case for theorizing what some scholars have termed small agency under conditions of great-power rivalry. The findings shed light on the dynamics of triangular interaction, the constraints and opportunities inherent in asymmetric power relations, and the enduring security dilemmas of contested parties. In doing so, the study not only advances the field of Taiwan studies but also enriches wider scholarship on global security and international politics.

This project would have been impossible without the guidance of my doctoral supervisor, Professor Lin Gang (林岡), founding director of Center for Taiwan Studies and professor emeritus at SJTU's School of International and Public Affairs. His expert advice during the early stages of topic selection and dissertation writing laid the intellectual foundation for this study. The very idea of translating my dissertation into English and publishing it also originated with him. I vividly recall an April 2019 meeting in his Xuhui Campus office, where Professor Lin hosted Jacob Dreyer, commissioning editor for business and politics at Palgrave Macmillan, to overview his new monograph *Taiwan's Party Politics and Cross-Strait Relations in Evolution (2008–2018)*. During that conversation, I expressed my admiration for Palgrave's reputation. Jacob, almost casually, remarked that I might one day publish with the press. At the time, the prospect seemed remote; today, it is reality. That brief exchange planted the seed for this book.

Since graduating in 2020, I have remained in close contact with Jacob. His persistent encouragement to finalize the manuscript was crucial in bringing this project to completion. Without his steady prodding, I could not have carved out the necessary time—amid an increasingly demanding academic workload—to undertake the extensive rewriting and reflection

required. This book is far more than a translation of my dissertation; it is a substantially reworked and expanded study. For his support, I extend my deepest gratitude.

I am equally indebted to my family. My parents and siblings have been unfailing sources of moral support. During my fellowship at the Harvard Kennedy School (August 2017–August 2018), my mother-in-law provided vital care for my wife Jing and our newborn son, Dongdong. Now approaching his tenth birthday, Dongdong’s lively presence has been a constant source of joy and motivation. Jing has been my steadfast partner, both academically and in navigating life’s many demands. Without her, completing this book would have been far more difficult. At the time of completing this manuscript, our family also welcomed our second son, affectionately called *Little Dragon Egg*—“Little Dragon” symbolizing his birth in the Year of the Snake, 2025. We look forward with confidence and gratitude that, like his elder brother, he will bring boundless love, joy, and energy to our family.

By combining theoretical innovation with historical depth, this monograph seeks to offer timely insights into Taipei’s mainland policy at a moment when both cross-Strait relations and China–U.S. ties are under acute strain. Through its blend of theoretical frameworks and multi-method analysis, the book is intended to serve diverse audiences—scholars, students, and policymakers—contributing to academic research, enriching university teaching, and informing policy deliberation.

Finally, despite my best efforts, the limitations of time and my own abilities mean that this book may contain errors or omissions, for which I take full responsibility. I warmly welcome comments and suggestions from readers. My hope is that this work will not only serve as a reference but also stimulate further discussion. Through continued dialogue and collaboration, we may together deepen our understanding of Taiwan studies, U.S.–China relations, and the evolving dynamics of international politics.

Nanjing, China
August 2025



Wenxing Zhou
Yongman Pavilion

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ABBREVIATIONS

| | |
|-------|---|
| ADIZ | Air Defense Identification Zone |
| AIT | American Institute in Taiwan |
| ARATS | Association for Relations Across the Taiwan Straits |
| CPC | Communist Party of China |
| CSSTA | Cross-Strait Service Trade Agreement |
| DPP | Democratic Progressive Party |
| ECFA | Economic Cooperation Framework Agreement |
| KMT | The Kuomintang |
| MAC | Mainland Affairs Council |
| OCTS | One Country, Two Systems |
| PET | Punctuated Equilibrium Theory |
| PFP | People First Party |
| PLA | People's Liberation Army |
| PRC | People's Republic of China |
| ROC | Republic of China |
| SEF | Straits Exchange Foundation |
| TAO | Taiwan Affairs Office |
| TRA | Taiwan Relations Act |

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Introduction

Abstract This chapter introduces the paradox at the heart of Taiwan's mainland policy: it has been remarkably stable in its broad commitment to the *status quo* while also prone to sudden volatility driven by electoral turnover and external crises. Using the example of the Taiwanese leader Lai Ching-te's 2025 controversial remarks and the People's Republic of China (PRC)'s sharp response, the chapter situates the Taiwan issue as both an enduring domestic fault line and a central flashpoint in China–U.S. rivalry. It reviews existing literature on external constraints (Beijing's pressure and Washington's balancing), domestic drivers (party politics, leadership, institutions, and identity), and economic interdependence across the Taiwan Strait, while highlighting shortage in integrative explanations. To address these, the chapter outlines the book's analytical approach, introducing the two-level punctuated-equilibrium theory that links internal partisan competition with external triangular pressures. Methodologically, it combines documentary analysis, comparative history, and public opinion surveys. This chapter thus sets the stage for a systematic exploration of Taiwan's cross-Strait policy change.

Keywords Taiwan's mainland policy · Cross-Strait policy · Policy change · Cross-Strait relations · Taiwan issue · Taiwan question · China–U.S. relations

1. *A perfect storm brewing across the Taiwan Strait?*

On March 13, 2025, Taiwanese leader Lai Ching-te publicly referred the Chinese mainland as a “foreign hostile force” (境外敌对势力), invoking the *Anti-Infiltration Act* (《反渗透法》), which had come into effect in January 2020. Speaking at a press conference following an alleged high-level national security meeting, Lai announced 17 major strategies in response to this perceived threat. Among them, the most controversial was his proposal to reinstate military courts, abolished in 2013.¹

The timing of Lai’s announcement was striking: it coincided with the twentieth anniversary of the PRC’s *Anti-Secession Law* (反分裂国家法, 2005). Beijing quickly condemned Lai’s remarks. At a press conference on March 26, Chen Binhua, Spokesperson for the State Council’s Taiwan Affairs Office (TAO, 国台办), denounced Lai’s characterization of the mainland as a “foreign hostile force,” declaring that such framing equated cross-Taiwan Strait relations with hostile ties. Chen labelled Lai a “destroyer of cross-Strait peace” and a “creator of a crisis,” warning that his moves marked a “a huge step backward in history.”²

Within days, the People’s Liberation Army (PLA) staged large-scale military drills encircling Taiwan’s northern, southern, and eastern coasts. In a video accompanying the announcement, the PLA’s Eastern Theater Command released English subtitles referring to Lai as a “parasite,” visually portraying him as a green insect held by chopsticks over a burning Taiwan.³

Although military exercises have become a familiar feature of cross-Strait dynamics in recent years, such actions underscore the persistent

¹ “Lai zongtong changting tanhua quanwen: Zhongguo shi jingwai didui shili huifu junshi shenpan yinying shentou” [Full Text of President Lai’s Open-hall Talk: China is a Foreign Hostile Force, To Resume Military Trials to Respond Infiltration], *CNA*, March 13, 2025, <https://www.cna.com.tw/news/aip/202503135005.aspx>

² “Guowuyuan taiban xinwen fabuhui jilu (2025-03-26)” [Compilations of Press Conferences of the Taiwan Affairs Office of the State Council (2025-03-26)], The Taiwan Affairs Office of the State Council, March 26, 2025, http://www.gwytb.gov.cn/xwdt/xwfb/xwfbh/202503/t20250326_12692186.htm

³ “Dongbu zhanqu manhua <ke> jie ‘Taidu’ fenzi zuixing” [The Cartoon “Shell” by the Eastern Theatre Command Reveals Crimes of “Taiwanese Independence” Forces], *Ta Kung Pao*, April 2, 2025, <https://www.takungpao.com/news/232108/2025/0402/1074219.html>

danger of escalation. An armed conflict cannot be ruled out, especially if Taipei's unilateral policy measures—like Lai's "17 major strategies"—are perceived by Beijing as provocations. Yet these measures may themselves be reactive—from Taiwan's perspective, of course—driven partly by mounting military and political pressure from the mainland. This raises a central question: why did Lai's administration initiate policy measures that were certain to antagonize Beijing? More broadly, what internal and external factors have historically driven, constrained, or redirected Taipei's cross-Strait policy over the past seventy-five years, particularly since Taiwan's democratic transition in the mid-1990s?

2. *A puzzle of policy change*

One may observe that Taiwan's mainland policy has been characterized by a paradoxical combination of remarkable stability and striking volatility. A comparative glance over various administrations highlights the paradox. Lai's mainland policy, while confrontational, remains no more radical than that of former Democratic Progressive Party (DPP, 民进党) authorities of Chen Shui-bian (陈水扁, 2000–2008), who vigorously pursued a *de jure* independence agenda and presided over periodic cross-Strait crises. By contrast, the KMT (Kuomintang, 中国国民党) administration of Ma Ying-jeou (马英九, 2008–2016) sought to stabilize relations through the "1992 Consensus" (九二共识),⁴ ushering in what is often described as the "golden age" of peaceful cross-Strait development.⁵ Yet despite its pro-unification tradition, even the KMT refrained from advancing concrete reunification steps, with Ma adhering to his "three no's"—no unification, no independence, and no use of force.

The historical record presents further puzzles. Why did Lee Teng-hui (李登辉), once a protégé of Chiang Ching-kuo (蒋经国) and initially a proponent of pragmatic engagement, shift dramatically toward the

⁴ Commentator of the Newspaper, "Jianchi liang'an gongtong zhengzhi jichu bu. dongyao" [Strengthening the Unwavering Adherence to the Common Political Foundation between the Two Sides of the Strait], *People's Daily*, November 9, 2015, p.1.

⁵ Shelley Rigger, "The End of a Golden Age in China-Taiwan Relations?" Carnegie Endowment for International Peace, June 24, 2016, <https://carnegieendowment.org/research/2016/06/the-end-of-a-golden-age-in-china-taiwan-relations?lang=en>

position of “two-state theory” (两国论) in 1999? Why did Chen Shui-bian pursue aggressive independence measures while Tsai Ing-wen (蔡英文) adopted a more cautious approach? Why did Ma Ying-jeou, despite his party’s ideological commitment to unification, ultimately prioritize stability over progress toward reunification? And why has Lai Ching-te now pursued a sharper, less moderate line than his predecessor, Tsai?

These puzzles point to a broader pattern: Taiwan’s cross-Strait policy appears inconsistent, irregular, and highly contingent. Since the 1950s, and especially in the past three decades, Taipei’s policies have swung along the axis between independence and unification, with both major parties—KMT and DPP—gradually converging around a pragmatic preference for maintaining the *status quo*. Explaining the sources of these oscillations and identifying the mechanisms behind convergence and divergence across time, lies at the heart of this monograph.

3. *Literature review*

Research on Taiwan’s mainland policy—commonly referred to as *cross-Strait policy*—is vast in scope yet uneven in depth. While the Taiwan question has long been considered one of the most dangerous flash-points in East Asia, scholarly inquiry into how and why Taipei formulates, sustains, and changes its policy toward Beijing remains surprisingly fragmented. Much of the literature emphasizes specific influencing factors, such as party politics, leadership styles, or U.S.–China relations. However, relatively few studies provide explanatory frameworks that systematically account for both continuity and change in Taiwan’s policy over time. This section reviews the state of the literature, identifies major debates, and highlights the research gaps that this book seeks to address.

EXTERNAL INFLUENCE: BEIJING AND WASHINGTON

One major strand of research centers on *external influences*, most prominently the role of Beijing and Washington. Scholars generally agree that the Chinese mainland is the most significant external factor shaping Taipei’s policy. From the 1958 Taiwan Strait conflict to the 1995–96 Strait crisis and more recent PLA military exercises, Beijing’s combination of deterrence and inducement has consistently constrained Taiwan’s

room for maneuver. A large body of work focuses on China's use of military means, legal instruments (such as the 2005 *Anti-Secession Law*), and economic integration to influence Taiwanese decision-making. Analysts debate the efficacy of these strategies: some argue that Beijing's military threats backfire by strengthening Taiwanese identity and resistance,⁶ while others contend that sustained pressure effectively deters steps toward formal independence.⁷

If Beijing represents the direct constraint, Washington represents the crucial balancer. U.S. policy since 1979 has revolved around the "one China" policy, the *Taiwan Relations Act* (TRA), the three joint communiqués, and the *Six Assurances*. Scholars have debated whether Washington's strategic ambiguity has successfully maintained peace or instead generated instability by emboldening Taipei while antagonizing Beijing.⁸ Recent scholarship has also examined how the intensifying U.S.–China strategic rivalry is reshaping Washington's Taiwan policy, with some analysts suggesting that ambiguity is giving way to "strategic clarity."⁹ Regardless of interpretation, the literature consistently emphasizes that Taiwan's policy toward the mainland cannot be understood without situating it within the triangular relationship among Taipei, Beijing, and Washington.¹⁰

⁶ Peter Wonacott, "Costly Conflict: Here's How China's military Options for Taiwan Backfire," The United States Institute of Peace, October 9, 2024, <https://www.usip.org/publications/2024/10/costly-conflict-heres-how-chinas-military-options-taiwan-backfire>

⁷ Xuetong Yan, "Wuli ezhi taidu fali duli de libi fenxi"[An Analysis of the Advantages and Disadvantages of Using Force to Curb Taiwan's Independence and Legal Independence], *Strategy and Management*, No.3 (2004), pp. 1–5.

⁸ Michael Cunningham, "Should the USA Maintain Its Policy of Strategic Ambiguity Towards Taiwan?" The Heritage Foundation, June 24, 2024, <https://www.heritage.org/china/commentary/should-the-usa-maintain-its-policy-strategic-ambiguity-towards-taiwan>; Richard Haass and David Sacks, "The Growing Danger of U.S. Ambiguity on Taiwan," *Foreign Affairs*, December 13, 2021, <https://www.foreignaffairs.com/articles/china/2021-12-13/growing-danger-us-ambiguity-taiwan>

⁹ Ye Ji and Yuquan Li, "The Clarity and Limit of the US Strategic Ambiguity Policy on the Taiwan Question: A Case Study on the Taiwan Travel Act," *Taiwan Studies*, No.3 (2022), pp. 22–30; Wenxing Zhou, "U.S. Taiwan Policy Change under Its 'Indo-Pacific Strategy': Strategic Clarity or Tactical Clarity?" *Studies on Fujian-Taiwan Relations*, No.1 (2022), pp. 2–21.

¹⁰ Lowell Dittmer, "Bush, China, Taiwan: A Triangular Analysis," *Journal of Chinese Political Science*, Vol.10, No.3 (2005), pp. 21–42; Shiping Hua ed., *Reflections on*

Other actors, such as the European Union and regional U.S. partners like Japan and Australia, are occasionally noted, but they occupy peripheral roles in the literature. Japan's security concerns and economic ties with Taiwan are not trivial,¹¹ the bulk of scholarship reflects the reality that the Taiwan question has been primarily framed as a Sino-American contest, with Taipei caught in the middle.

DOMESTIC POLITICS: DEMOCRATIZATION, POLITICAL PARTIES, AND LEADERSHIP

A second major body of literature focuses on *domestic politics* within Taiwan. The island's transition to democracy in the late 1980s and early 1990s fundamentally altered the dynamics of mainland policy. Earlier authoritarian-era decisions, dominated by the KMT, pursued eventual reunification under the one China framework. With democratization, however, policy became increasingly subject to party politics and electoral competition.¹² Research highlights how the DPP, rooted in the pro-independence movement, sought to challenge the KMT's China-oriented stance by advocating varying degrees of independence. Studies demonstrate how mainland policy became a central electoral issue, with parties framing the debate around sovereignty, security, and economic opportunity.¹³

Another line of research emphasizes the role of individual leaders. Lee Teng-hui's pivot toward the "two-state theory" in 1999, Chen Shui-bian's push for *de jure* independence, Ma Ying-jeou's embrace of the "1992 Consensus," and Tsai Ing-wen's careful balance of *status quo* maintenance all illustrate how personal convictions, political calculations, and

the Triangular Relations of Beijing-Taipei-Washington Since 1995 (London: Palgrave Macmillan, 2006).

¹¹ June Teufel Dreyer, "Taiwan and Japan in the Tsai Era," *Orbis*, (Fall 2016), pp. 592-608; Madoka Fukuda, "The Japan-Taiwan Relationship Under the Tsai Ing-wen Administration," in Wei-chin Lee ed., *Taiwan's Political Re-Alignment and Diplomatic Challenges* (London: Palgrave Macmillan, 2019), pp. 297-322.

¹² Gang Lin, *Taiwan's Party Politics and Cross-Strait Relations in Evolution (2008-2018)* (London: Palgrave Macmillan, 2019).

¹³ John Hsieh and Emerson Niou, "Salient Issues in Taiwan's Electoral Politics," *Electoral Studies*, Vol.15, No.2 (1996), pp. 219-235; Tehfu Huang and Emerson M. S. Niou, "Electoral Politics in Taiwan," *Asian Affairs: An American Review*, Vol.23, No.2 (1996), pp. 128-138.

leadership style influence policy outcomes. Scholars debate the extent to which leaders drive change versus being constrained by structural factors.¹⁴

Taiwan's fragmented political institutions—especially divided government between the executive and the Legislative Yuan—are also cited as sources of policy volatility.¹⁵ Intra-party divisions—between traditionalist and Taiwan-centric wings of the KMT, or between moderates and radicals in the DPP—have further shaped policy outcomes, highlighting the importance of institutional and factional politics.¹⁶

IDENTITY, GENERATIONAL CHANGE, AND PUBLIC OPINION

A vast literature also highlights shifting Taiwanese identity as a key determinant. Since the 1990s, surveys consistently show a rising share of the population identifying as “Taiwanese” rather than “Chinese,” and a growing preference for maintaining the *status quo* over immediate unification or independence. Scholars argue that these shifts create structural constraints on policymakers, forcing both KMT and DPP leaders to moderate their positions.¹⁷ Some emphasize the feedback loop between

¹⁴ Chi Su, *Taiwan's Relations with Mainland China: A Tail Wagging Two Dogs* (London: Routledge, 2009); Robert S. Ross, “Explaining Taiwan’s Revisionist Diplomacy,” *Journal of Contemporary of China*, Vol.15, No.48 (2006), pp. 443–458; Jonathan Jen-Fu Yang, *Guarding the Nation against the Market: The Rise and Fall of Taiwan’s “No Haste, Be Patient” Policy, 1996–2001* (Toronto, Ontario: PhD Thesis of York University, 2010).

¹⁵ Weixu Wu and Gang Lin, “Veto Players in Unified Government: A Study of Legislative Deliberation of Cross-Strait Service Trade Agreement of Taiwan Province,” *Journal of Shanghai Jiao Tong University (Philosophy and Social Sciences)*, No.3 (2015), pp. 15–23.

¹⁶ Yu-Shan Wu, “The DPP Ascendancy and Cross-Strait Relations,” in Wei-chin Lee ed., *Taiwan's Political Re-Alignment and Diplomatic Challenges* (London: Palgrave Macmillan, 2019), pp. 177–206; Dafydd Fell, *Party Politics in Taiwan: Party Change and the Democratic Evolution of Taiwan, 1991–2004* (London, England and New York, NY: Routledge, 2005); Guoshen Liu, *Minjindang yishixingtai yanjiu* [Research on the Ideology of the DPP] (Beijing: Jiuzhou Press, 2005).

¹⁷ Yu-Shan Wu, “Taiwanese Elections and Cross-Strait Relations: Mainland Policy in Flux,” *Asian Survey*, Vol.39, No.4 (1999), p.587; Richard C. Bush, “Domestic Politics and Cross-Strait Relations,” in Richard C. Bush, *Untying the Knot: Making Peace in the Taiwan Strait* (Washington, D.C.: Brookings Institution Press, 2005), pp. 142–198.

Beijing's policies and identity formation, suggesting that coercion accelerates localization/Taiwanization (台湾本土化).¹⁸ Others underscore the role of generational change, civic nationalism, and the memory of democratization in deepening Taiwan-centric identities.¹⁹ Public opinion has accordingly emerged as a powerful veto player. Leaders who overreach—pursuing radical independence, as under Chen Shui-bian, or rapid integration, as under Ma Ying-jeou—tend to trigger electoral backlash.²⁰ This dynamic situation underscores the centrality of framing strategies: how parties present mainland policy to voters determines not only electoral outcomes but also the scope of feasible policy in office.

CROSS-STRAIT ECONOMIC INTEGRATION

Cross-Strait economic interdependence has been widely studied, though with divergent conclusions. One line of the argument suggests that economic ties create vested interests in peace and stability, making conflict less likely.²¹ Another contends that asymmetric dependence empowers Beijing to exert political influence, thereby eroding Taiwan's autonomy.²² The 2010 Economic Cooperation Framework Agreement (ECFA) and the 2014 Sunflower Movement stand as focal points for this debate: the former symbolizing economic pragmatism, the latter illustrating domestic backlash against perceived political risks. The debate remains unresolved,

¹⁸ Richard Bush and Ryan Hass, *Taiwan's Democracy and the China Challenge* (Policy Brief, Foreign Policy at Brookings, Washington D.C.: Brookings Institution, 2019).

¹⁹ Yun-han Chu, "Taiwan's National Identity Politics and the Prospect of Cross-Strait Relations," *Asian Survey*, Vol.44, No.4 (2004), pp. 484–512.

²⁰ John Fuh-sheng Hsieh, "Butter or Guns: Taiwan's Economic Policy toward China," *Journal of Contemporary China*, Vol.33, No.145 (2024), pp. 14–29; Ja Ian Chong, David W. F. Huang and Wen-chin Wu, "Stand up Like a Taiwanese!": PRC Coercion and Public Preferences for Resistance," *Japanese Journal of Political Science*, Vol.24, No.2 (2023), pp. 208–229.

²¹ Scott L. Kastner, *Political Conflict and Economic Interdependence Across the Taiwan Strait and Beyond* (Sandford: Sandford University Press, 2009); Gunter Schubert, Ruihua Lin, and Jean Yu-Chen Tseng, "Are Taiwanese Entrepreneurs a Strategic Group? Reassessing Taishang Political Agency across the Taiwan Strait," *Asian Survey*, Vol.57, No.5 (2017), pp. 856–884.

²² Weixing Hu, "Explaining Change and Stability in Cross-Strait Relations: A Punctuated Equilibrium Model," *Journal of Contemporary China*, Vol.21, No.78 (2012), pp. 933–953.

reflecting the dual nature of interdependence as both constraint and vulnerability.

POLICY PROCESS, SHOCKS, AND CYCLES

While much of the literature identifies important variables, fewer works focus on the policy process itself. Some adopt issue-cycle approaches, highlighting how crises or external shocks elevate the salience of cross-strait issues and produce policy adjustments.²³ The 1995–96 Taiwan Strait Crisis, for instance, is often interpreted as a punctuating event that reshaped both Taipei’s and Washington’s policies.²⁴ Other studies emphasize agenda-setting and framing battles, showing how parties mobilize sovereignty, democracy, or prosperity discourses to capture electoral support and subsequently inform policy orientations once in power.²⁵

GAPS IN THE LITERATURE

Despite rich scholarship, significant gaps remain for further studies.

First, there is a lack of explanatory synthesis. Most studies remain factor-driven, focusing narrowly on external constraints, party politics, leadership, or identity. Few, however, offer an integrated framework that explains how these factors interact dynamically to generate cycles of stability and disruption in Taiwan’s cross-strait policy.

Second, public policy theories are underutilized. While international relations theories continue to dominate, the analytical potential of public policy frameworks—such as punctuated equilibrium, policy feedback, and agenda-setting models—has received little attention. As a result, Taiwan’s cross-strait policy is too often treated merely as an outcome of power

²³ Hu, “Explaining Change and Stability in Cross-Strait Relations.”

²⁴ Robert S. Ross, “The 1995–96 Taiwan Strait Confrontation: Coercion, Credibility, and the Use of Force,” *International Security*, Vol.25, No.2 (2000), pp. 87–123; Andrew Scobell, *Show of Force: The PLA and the 1995–1996 Taiwan Strait Crisis* (Walter H. Shorenstein Asia-Pacific Research Center, 1999).

²⁵ Ching-hsin Yu and T. Y. Wang, “Party’s Issue Competence and Electoral Decisions in Taiwan’s 2012 and 2016 Presidential Elections,” in Wei-chin Lee ed., *Taiwan’s Political Re-Alignment and Diplomatic Challenges* (London, UK: Palgrave Macmillan, 2019), pp. 97–116; Lutgard Lams, “Issues Salience and Framing in the Taiwanese 2016 Presidential Election Campaign: An Analysis of the KMT and DPP Campaign Discourses,” *International Journal of Taiwan Studies*, Vol.1, No.2 (2018), pp. 301–330.

politics, rather than as a policy process shaped by institutional dynamics, feedback mechanisms, and critical junctures.

Third, scholarship frequently neglects two-level interactions, resulting in a persistent “level-of-analysis problem.”²⁶ Internal and external factors are well documented separately, but their interdependence remains insufficiently examined. For instance, how does U.S. pressure intersect with Taiwan’s electoral politics? In what ways do shifts in public identity constrain leaders’ responses to Beijing’s strategies? Few studies systematically analyze these reciprocal dynamics.

Fourth, longitudinal analysis is limited.²⁷ Much of the literature concentrates on individual administrations (e.g., Lee Teng-hui, Chen Shui-bian, and Tsai Ing-wen) or specific crises. Rare are studies that span multiple decades in a comparative manner, making it difficult to discern recurring patterns of equilibrium and punctuation in Taiwan’s policy evolution.

Finally, empirical challenges constrain the field. Restricted access to primary decision-making archives has forced scholars to rely heavily on secondary sources and media reports. Although the growing availability of polling data has enhanced understanding of Taiwanese identity and public opinion, such data are seldom incorporated systematically into explanatory frameworks.

²⁶ The “level-of-analysis problem” in international relations studies refers to the challenge of choosing the appropriate perspective or level to explain political phenomena. For more information, see J. David Singer, “The Level-of-Analysis Problem in International Relations,” *World Politics*, Vol.14, No.1 (1961), pp. 77–92. A critical review essay on the application of level-of-analysis approach to Taiwan studies can be found in Wenxing Zhou and Gang Lin, “Liang’an guanxi yanjiu zhong de cengci fenxi wenti” [The Problem of Level-of-Analysis in the Study of Cross-Strait Relations], *Cross-Taiwan Strait Studies*, No.2 (2019), pp. 46–54.

²⁷ Longitudinal analysis, or longitudinal studies, represents one of the principal methodological approaches applied in this book. As defined in the literature, such studies “employ continuous or repeated measures to follow particular individuals over prolonged periods of time—often years or decades” (see Edward Joseph Caruana et al., “Longitudinal Studies,” *Journal of Thoracic Disease*, Vol.7, No.11, 2015, pp. E537–E540). While this approach is most often applied to the study of individuals, its logic is equally valuable in analyzing long-term policy trajectories. The subject of this book—Taiwan’s mainland policy—extends over more than seven decades, encompassing dramatic changes in domestic politics, cross-Strait dynamics, and international contexts. A longitudinal approach is therefore indispensable, enabling systematic exploration of how Taiwan’s policy has evolved across successive leaderships and historical junctures, and how periods of equilibrium have been punctuated by abrupt shifts.

Taken together, the literature underscores the complexity of Taiwan's mainland policy but falls short of providing a comprehensive explanatory model. It remains rich in descriptive accounts of influencing factors yet poor in integrative frameworks that connect internal and external dynamics across time. This book seeks to address these shortcomings by applying the punctuated equilibrium theory—supplemented by two-level game theory and the strategic triangular model—to construct a synthetic explanation of Taiwan's mainland policy change.

METHODS AND APPROACHES

The book is dedicated to addressing the research gaps identified in the previous section by adopting an integrative methodological approach grounded in three complementary theoretical perspectives: the punctuated equilibrium theory (PET), the strategic triangular model, and two-level game theory. Synthesizing these perspectives yields what I term the *Two-Level Punctuated-Equilibrium Theory of Taiwan's Mainland Policy Change*. This framework is designed not only to explain policy outcomes but also to identify the conditions, processes, and constraints that generate them. In particular, it links domestic partisan dynamics and public opinion with the broader structural pressures of U.S.–China rivalry, thereby situating Taiwan's policymaking within both internal and external triangular structures.

Studying Taiwan's mainland policy poses distinctive challenges. Given its extreme political sensitivity, access to primary decision-making archives is severely limited, which partly explains the relative paucity of explanatory research in this area. To overcome these obstacles, this book employs a multi-method research design that combines diverse approaches to trace the dynamics of both equilibrium and punctuated change.

First, documentary and content analysis form the backbone of the study. This includes systematic examination of official policies, regulations, and government reports issued by Beijing, Taipei, and Washington concerning cross-strait relations. It also encompasses speeches, public statements, and leadership discourses by Taiwanese leaders across different administrations, allowing for the identification of shifts in framing strategies and policy agendas. These materials are read alongside policy reports from academic institutions and think tanks, as well as coverage in Taiwanese media outlets representing both the pan-blue (KMT-aligned) and pan-green (DPP-aligned) camps. Together, these sources enable

triangulation of official positions, partisan interpretations, and public narratives.

Second, historical and comparative analysis and longitudinal studies approach are employed to trace Taiwan's mainland policy from the 1950s through the present. This diachronic approach highlights both continuities and ruptures throughout administrations, situating Taiwanese policymaking within shifting global and regional contexts. Special attention is paid to critical junctures—such as the 1995–96 Taiwan Strait Crisis, the 2005 *Anti-Secession Law*, the 2014 Sunflower Movement, and more recent episodes such as Nancy Pelosi's 2022 visit and Lai Ching-te's articulation of a “two-state theory” in 2024—which function as punctuating events within broader equilibrium periods. Comparative analysis of leadership eras—from Chiang Kai-shek and Chiang Ching-kuo to Lee Teng-hui, Chen Shui-bian, Ma Ying-jeou, Tsai Ing-wen, and Lai Ching-te—allows the framework to be tested across different institutional, electoral, and geopolitical environments.

Third, the book incorporates descriptive statistical analysis to link shifts in mass attitudes to policy change. Public opinion surveys are crucial for understanding Taiwan's internal triangle of ruling party, opposition, and the public. Key datasets include the longitudinal surveys by the Chengchi University's Election Study Center, which track self-identification (Taiwanese, Chinese, or both), preferences regarding independence and unification, and partisan attachments.²⁸ These datasets enable the study to examine how generational shifts, electoral cycles, and crisis events affect the scope of feasible policy.

By combining these approaches and methods, the study develops a layered analytical strategy. Documentary and content analysis captures the rhetoric and framing strategies of political elites; historical and comparative research identifies structural continuities and punctuations; and survey analysis links elite strategies to mass preferences, clarifying how public opinion functions as a constraint and a driver in the policy process of the two main parties. Both domestic and external triangulations ensure that the two-level punctuated-equilibrium framework is tested against both qualitative evidence and quantitative indicators, providing a comprehensive explanation of how domestic politics and international rivalry jointly shape Taiwan's mainland policy over time.

²⁸ “Data Achieves,” <https://esc.nccu.edu.tw/PageDoc/Detail?fid=7800&id=6961>

KEY ARGUMENTS

This book advances the argument that Taiwan's mainland policy is best understood through the lens of punctuated equilibrium, rather than linear incrementalism. Since 1949, Taiwan's approach has alternated between extended periods of continuity and sudden, disruptive punctuations, with each shift shaped by the interplay of domestic partisan competition and external triangular pressures from Beijing and Washington. The two-level punctuated-equilibrium framework developed here demonstrates how domestic framing battles and electoral incentives interact with the structural constraints of the Washington–Beijing–Taipei triangle to produce cyclical patterns of equilibrium and disruption.

The analysis of key administrations reveals distinctive patterns. Under Chen Shui-bian, the model of *electoral punctuation followed by external constraint* became evident: domestic turnover opened a policy window, but Beijing and Washington quickly imposed firm limits. Under Ma Ying-jeou, the inverse dynamic of *external equilibrium followed by domestic punctuation* was visible: a permissive international environment facilitated rapprochement, but the Sunflower Movement truncated progress. The post-2016 era under Tsai Ing-wen and Lai Ching-te reflects a third pattern: *domestic mandate aligned with external rivalry*. This has enabled bolder symbolic assertions of autonomy while simultaneously heightening risks of coercion from Beijing and entrapment of Washington in the crisis. Together, these cases demonstrate that Taiwan's mainland policy trajectory is best explained by the sequencing of domestic and external punctuations, not by steady, incremental adjustment.

Three central arguments emerge. First, Taiwan's policy since 1949 has evolved through bounded cycles of equilibrium and punctuation, with periods of apparent stability masking underlying volatility. Second, the two-level triangular structures—the ruling party, the opposition, and the public internally; Washington, Beijing, and Taipei externally—provide a framework for understanding how pressures align or misalign to drive change. Third, Taiwan's policy agency is both real and constrained: Taipei can recalibrate within margins but cannot escape the dual bind of domestic polarization and great-power rivalry.

From these findings flow important policy implications. For Taipei, reconciling identity affirmation with pragmatic risk management and broadening domestic win-sets through institutional reforms will be

essential for sustaining consensus. For Beijing, over-reliance on coercion undermines its long-term unification goals, making a recalibration toward credible incentives and reassurances more effective. For Washington, avoiding the instrumentalization of Taiwan purely as a bargaining chip while balancing deterrence with reassurance is critical for stability. For the region and beyond, Taiwan's mainland policy is not peripheral but a central test of resilience under great-power rivalry, carrying direct implications for supply chains, alliance credibility, and Indo-Pacific security.

CHAPTER ARRANGEMENT OF THIS BOOK

The book is organized into six substantive chapters, in addition to the conclusion.

Chapter 1 provides the foundation for this book by situating Taiwan's mainland policy within both contemporary tensions and long-term historical patterns. It begins with a case study of Lai Ching-te's provocative 2025 remarks, highlighting the immediacy of the Taiwan question as a potential flashpoint in U.S.–China relations. The chapter then poses the central puzzle: why Taiwan's mainland policy has been simultaneously stable and volatile, alternating between equilibrium and sharp shifts across administrations. To contextualize this paradox, it offers a literature review that maps key debates on external constraints (Beijing and Washington), domestic politics (parties, leaders, institutions, and identity), and cross-Strait economic integration, while underscoring gaps in integrative frameworks. Finally, the chapter introduces the book's methodological approach, combining documentary, historical, comparative, and survey analyses, and presents the core theoretical claim that Taiwan's mainland policy is best understood through a two-level punctuated-equilibrium framework linking domestic competition with external triangular pressures.

Chapter 2 offers a historical review of Taiwan's mainland policy since the outbreak of the Korean War, structured into three broad phases. The first phase covers the period under the KMT one-party rule, spanning the leadership of Chiang Kai-shek (1949–1975), Chiang Ching-kuo (1975–1988), and Lee Teng-hui (1988–2000). During this period, Taipei's mainland policy experienced gradual changes and the late 1980s saw the first cautious adjustments toward limited cross-Strait interaction. The second phase traces the democratic alternation of power, beginning

with the independence-leaning DPP administration of Chen Shui-bian (2000–2008), followed by the KMT administration of Ma Ying-jeou (2008–2016) whose policies emphasized engagement and rapprochement with Beijing. This stage highlights the pendulum-like swings in cross-Strait policy driven by electoral politics and party ideology. The third phase examines the more assertive era under the DPP leadership of Tsai Ing-wen (2016–2024) and her successor Lai Ching-te (2024–present). Both leaders have pursued strategies that consolidate Taiwan’s autonomy while resisting Beijing’s unification agenda, thereby pushing cross-Strait relations into a new stage characterized by heightened tension, intensified deterrence, and growing international involvement.

Chapter 3 examines the internal-level factors shaping Taiwan’s cross-Strait policy, with ruling party turnover between the KMT and the DPP as the primary driver of change. Electoral competition compels both parties to adjust their mainland policies, balancing ideology with pragmatic appeals to voters. To gain advantage, the KMT and DPP engage in framing contests, strategically defining issues of sovereignty, security, and economic stability to influence public opinion and set the policy agenda. These contests link electioneering directly to policy shifts, producing recurring cycles of instability. Even after elections, opposition parties constrain the ruling authority by counter-framing policies and mobilizing public resistance, thereby limiting implementation and shaping future electoral outcomes. In this way, democratization has institutionalized a dynamic in which partisan rivalry and electoral incentives continually drive Taiwan’s mainland policy in fluctuating patterns of stability and change.

Chapter 4 examines external-level factors, focusing on the triangular dynamics between Beijing, Washington, and Taipei. It argues that the balance of strategic competition and cooperation between China and the United States is the decisive external determinant of Taiwan’s mainland policy. Beijing views unification as a historic mission, while Washington prioritizes maintaining the *status quo* to safeguard its regional interests. Despite divergent long-term goals, both powers share a clear opposition to *de jure* Taiwanese independence, creating limited yet significant grounds for alignment. The degree of U.S.–China rivalry, however, critically shapes Taipei’s room for maneuver. Periods of intensified competition often provide Taiwan with greater space to pursue incremental steps toward autonomy, while moments of relative cooperation between Beijing and Washington narrow those opportunities. Thus, Taiwan’s

mainland policy is profoundly conditioned by shifts in the broader U.S.–China relationship, which set the external boundaries of Taipei’s strategic choices.

Chapter 5 develops the theoretical framework for explaining Taiwan’s mainland policy change by synthesizing the insights from punctuated equilibrium theory, two-level game theory, and strategic triangular model. It shows how Taiwan’s cross-Strait policy emerges from the interplay between internal electoral politics and external strategic pressures. On the domestic level, party turnover and framing contests generate instability, as the KMT and DPP adjust their mainland positions to maximize electoral advantage. Externally, Beijing’s unification agenda and Washington’s preference for the *status quo* impose powerful constraints, with the balance of U.S.–China competition shaping Taipei’s available options. By linking these two levels, the chapter demonstrates that policy shifts are rarely linear or purely domestic in origin; rather, they reflect simultaneous bargaining pressures from voters, opposition parties, and international actors. This two-level interaction produces the punctuated equilibrium pattern of long periods of relative stability interrupted by sharp policy shifts, explaining the cyclical nature of Taiwan’s mainland policy over the past decades.

Chapter 6 addresses the contemporary and future challenges of Taiwan’s mainland policy through what I call the “double dilemma.” Domestically, Taiwan faces deepening partisan polarization between the KMT and DPP, with mainland policy remaining a focal point of electoral competition and a source of policy volatility. Externally, Taipei confronts intensifying rivalry between Beijing and Washington. Growing cross-Strait economic interdependence, combined with Beijing’s expanding military and diplomatic leverage, positions the PRC as an increasingly decisive actor in shaping Taiwan’s policy options. At the same time, Washington’s capacity to influence Taipei may gradually diminish as the regional balance of power shifts toward Beijing. These twin pressures—internal partisan contestation and external great-power rivalry—create a narrowing policy space for Taiwan’s leaders. The chapter argues that how Taipei navigates this “double dilemma” will critically shape the island’s policy trajectory in the coming decades.

This chapter also *introduces a scenario matrix mapping Taiwan’s policy trajectories along two axes: domestic framing dominance (DPP*

versus KMT) and external strategic context (U.S.–China cooperation versus competition). This framework generates four scenarios—Constrained Symbolism, Assertive Autonomy, Stable Engagement, and Fragile Balancing—each capturing a different configuration of opportunity and constraint. According to this matrix, short-term prospects suggest oscillation between Constrained Symbolism and Assertive Autonomy under Lai Ching-te’s tenure, reflecting the DPP’s domestic dominance and a transactional but tense external environment. Over the longer horizon, Assertive Autonomy and Fragile Balancing are the most likely baselines, though cycles across all four scenarios remain possible depending on U.S.–China relations and partisan alignments in Taiwan.

In sum, this book develops an integrative theoretical framework and employs a multi-method empirical strategy to explain the dynamics of Taiwan’s mainland policy change. It demonstrates not only why such policy shifts occur at particular moments, but also why partisan positions sometimes converge and at other times diverge. By situating Taiwan’s policy process within the interplay of domestic politics and international strategic competition, the study highlights how internal and external factors jointly shape outcomes. In doing so, it contributes both to the theoretical understanding of punctuated policy change and to the practical analysis of one of the most sensitive flashpoints in contemporary international relations.