

NEITHER INDEPENDENCE NOR UNIFICATION: TAIWAN'S MAINLAND CHINA POLICY DURING THE MA YING-JEOU ERA (2008–2016)

Nem Independência Nem Unificação: a Política de Taiwan para a China Continental durante o Governo Ma Ying-Jeou (2008–2016)

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ABSTRACT

The purpose of this article is to analyze Taiwan's mainland China policy during the Ma Ying-jeou administration as a strategy of economic statecraft, and how it shaped Taiwan's economic, foreign, and cross-strait policies. In 2008, Ma, from the Kuomintang, won the Taiwanese presidential election, ending eight years of Chen Shui-bian's pro-de jure independence administration and fundamentally altering relations between Taiwan and China. Ma, who identified himself as ethnically Chinese and opposed Taiwanese independence, adopted several policies, including the suspension of pro-de jure independence activities, the establishment of direct contact with Beijing, and the signing of multiple economic agreements. Although cross-strait relations improved, no political negotiations were conducted. This article argues that Ma strategically adopted a China-friendly policy stance primarily to extract political and economic concessions from Beijing. De facto, Ma promoted the maintenance of Taiwan's sovereignty by rejecting unification and pressing Beijing to frame cross-strait talks as a special form of non-international "state-to-state" relations.

Keywords: Ma Ying-jeou. Mainland China. Taiwan. Cross-strait Relations.

RESUMO

O objetivo deste artigo é analisar a política de Taiwan em relação à China continental durante a administração de Ma Ying-jeou como uma estratégia de economic statecraft, e como essa política influenciou as dimensões econômica, externa e das relações entre os dois lados do Estreito. Em 2008, Ma, do Kuomintang, venceu a eleição presidencial taiwanesa, encerrando oito anos da administração pró-independência de Chen Shui-bian e alterando de forma substantiva as relações entre Taiwan e a China. Ma, que se identificava como etnicamente chinês e se posicionava contra a independência de Taiwan, adotou diversas medidas, incluindo a suspensão de atividades pró-independência, o estabelecimento de contatos diretos com Pequim e a assinatura de múltiplos acordos econômicos. Embora as relações entre os dois lados do Estreito tenham melhorado, não foram conduzidas negociações políticas. O artigo sustenta que Ma adotou estrategicamente uma postura favorável à China com o objetivo principal de extrair concessões políticas e econômicas de Pequim. De facto, Ma promoveu a manutenção da soberania de Taiwan ao rejeitar a unificação e ao pressionar Pequim a enquadrar as negociações entre os dois lados do Estreito como uma forma especial de relações não internacionais de "Estado para Estado".

Palavras-chave: Ma Ying-jeou. China Continental. Taiwan. Relações através do Estreito.

INTRODUCTION

Since the political liberalization of the Republic of China (ROC) in Taiwan in the late 1980s, cross-strait relations between the ROC and the People's Republic of China (PRC) have become increasingly volatile, largely due to domestic political developments in Taiwan and China's strong reaction to Taiwan's democratization. In 2000, cross-strait tensions reached a critical juncture



when the Kuomintang (KMT, or Chinese Nationalist Party) lost the presidential election to the de jure pro-de jure independence Democratic Progressive Party (DPP), bringing to an end fifty-five years of uninterrupted KMT rule. The newly elected president, Chen Shui-bian (2000–2008), sought to advance Taiwan’s de jure independence through constitutional reform, including efforts to change the ROC’s official name to the “Republic of Taiwan” (臺灣共和國), an effort that ultimately failed due to the lack of a legislative majority. The DPP’s pro-de jure independence initiatives provoked strong reactions from both the United States (US), which favored the preservation of the status quo, and the People’s Republic of China (PRC), which categorically opposed any move toward Taiwanese independence. In response, the PRC promulgated the Anti-Secession Law (反分裂國家法) in 2005, which explicitly “authorized” Beijing to employ “non-peaceful means” (非和平方式) should Taiwan pursue formal independence.

Cross-strait relations were fundamentally reshaped by the election of Ma Ying-jeou as president of the ROC in 2008, marking the KMT’s return to power. Under Ma’s administration, all pro-de jure independence initiatives were suspended, and a series of cross-strait economic agreements were concluded. Ma’s “China-friendly” mainland policy was swiftly criticized by the domestic opposition as amounting to the “selling out” of Taiwan to the PRC. Against the backdrop of China’s rise as a global power, several US scholars—including Murray Scott Tanner (2007), Bruce Gilley (2010), and John Mearsheimer (2014)—predicted that the PRC’s growing economic leverage over Taiwan would ultimately translate into political control. Paul V. Kane (2011), in turn, controversially suggested that the United States should “ditch Taiwan” to safeguard its own economic interests. Nevertheless, throughout Ma’s presidency (2008–2016), no formal political negotiations were conducted across the Taiwan Strait.² The PRC’s expectations were further disappointed when the KMT suffered a landslide defeat in Taiwan’s presidential and legislative elections in 2016, resulting in the DPP’s return to power and a renewed destabilization of cross-strait relations.

Since 1949, the issue of Taiwan’s sovereignty has constituted the core question underpinning cross-strait relations between Taiwan and China. Following the victory of the Chinese Communist Party (CCP) on the mainland and the relocation of the ROC’s central government to Taiwan, the PRC asserted itself as the sole legitimate government of all China, including Taiwan. Beijing consistently promoted unification under the “one country, two systems” (一國兩制) framework as the only acceptable resolution of the dispute. Moreover, the PRC sought to reframe cross-strait relations as the “Taiwan question” (臺灣問題), characterizing Taiwan as a purely “domestic issue” and pressuring the international community to endorse the “one China principle” (一個中國原則), under which Taiwan is recognized as an integral part of the PRC. These

² Although the Ma Ying-jeou administration concluded several cross-strait economic agreements, no formal negotiations were undertaken on questions of sovereignty, political status, or the future political relationship between the ROC and the PRC. Therefore, the term “political negotiations” in this article excludes economic and technical agreements.

efforts formed part of Beijing's broader strategy to diplomatically isolate the ROC, prevent the internationalization of the Taiwan issue, and deter foreign intervention. On multiple occasions, the PRC explicitly threatened the use of force should Taiwan declare independence or indefinitely refuse unification.

The purpose of this article is to analyze the Ma administration's policy toward the PRC. The authors argue that the "China-friendly" approach adopted by Ma was a strategic choice aimed at fostering a stable and peaceful cross-strait environment in order to extract economic and political concessions from Beijing, rather than a genuine attempt to advance unification with the PRC. After achieving these initial objectives, Ma sought to initiate political talks on Taipei's terms, framing cross-strait relations *de facto* as a special form of non-international "state-to-state" relations, where both sides enjoy equal status as political entities and interact on an equal footing, rather than as a "central government" and a "local government"; however, these overtures were rebuffed by Beijing. Furthermore, the concessions offered by the PRC failed to produce the anticipated outcomes, contributing to a gradual decline in the Ma administration's domestic popularity and culminating in the KMT's defeat in the 2016 presidential elections.

Methodologically, this article adopts a qualitative, single-case study design, employing process tracing to reconstruct the sequence of decisions, signals, and reactions that shaped cross-strait relations during the Ma Ying-jeou administration. The analysis draws primarily on official statements and speeches by Taiwanese and Chinese leaders (Office of the President of the ROC, the PRC's Taiwan Affairs Office, and Xinhua News Agency), complemented by government statistical sources (DGBAS, MAC, MOEA) and secondary literature on cross-strait relations. This combination of primary documentary sources in Chinese and English with quantitative indicators—covering trade, investment, tourism, defense spending, and public opinion—allows the article to triangulate elite-level discourse with material outcomes, assessing the extent to which Ma's declared policy objectives were realized in practice.

This article is structured into eight sections. The first section examines the formation of the strategic alignment between the KMT and the CCP prior to 2008 and analyzes the subsequent pacification of cross-strait relations. The second section discusses the perceived "revival" of the ROC and Taiwan's participation in the international community during this period. The third section analyzes cross-strait economic integration and the reaffirmation of the "two Chinas" framework. The fourth section addresses the crisis and eventual collapse of the Ma administration. The article concludes with broader reflections on Ma's strategic approach toward the PRC and the future trajectory of cross-strait relations.

THEORETICAL FRAMEWORK

This article situates Ma Ying-jeou's mainland China policy within the literature on economic statecraft and asymmetric interdependence. Economic statecraft refers to the deliberate use of economic instruments—trade liberalization, investment access, market opening—to pursue political objectives, whether through inducement (the offering of economic benefits in exchange for political concessions) or coercion (the threat or imposition of economic costs) (Hirschman,



1945; Baldwin, 1985). While economic statecraft is most commonly analyzed from the perspective of the stronger power, this article examines its use by the weaker party in an asymmetric dyad: Ma's strategy can be read as an attempt to deploy economic engagement as a form of *leverage from below*, using the prospect of deeper integration with the mainland market to extract diplomatic and political concessions from Beijing.

Such a strategy, however, operates within the constraints identified by the literature on asymmetric interdependence. Keohane and Nye (1977) distinguish between sensitivity (the speed and degree to which a change in one actor's policy affects another) and vulnerability (the cost of adjusting to that change once alternatives are foreclosed). In a relationship as structurally unequal as that between the ROC and the PRC, deepening economic ties tends to increase the ROC's sensitivity and vulnerability far more than the reverse, regardless of the short-term concessions Taipei may obtain. More recent scholarship on "weaponized interdependence" (Farrell and Newman, 2019) similarly emphasizes that asymmetric economic networks can be leveraged by the structurally dominant actor even without overt coercion, simply through its capacity to selectively grant or withhold access.

This framework generates a testable expectation for the Ma era: insofar as cross-strait economic integration was asymmetric, any leverage Taipei gained from goodwill measures should have been partial and reversible, while the structural dependence generated by integration should have proven comparatively durable—visible, for instance, in Beijing's continued capacity to block Taiwan's diversification toward third markets (multilateral and bilateral free trade agreements) even as it permitted limited diplomatic gestures (WHA, ICAO observer status). The empirical sections below assess this expectation against the trajectory of Ma's economic and diplomatic initiatives.

In addition to this international-political-economy framework, the article draws on the literature on Taiwanese domestic politics and national identity to account for the *domestic* reception of Ma's mainland policy. Rigger's (2011; 2021) work on the consolidation of a distinct Taiwanese identity as a generational and civic—rather than purely ethnic—phenomenon provides the interpretive lens through which the identity shifts documented in Section 2 should be read. Fell's (2018) analysis of party competition in Taiwan further suggests that the KMT–DPP rivalry structures the domestic costs of cross-strait engagement: policies that might be economically rational from a statecraft perspective can become politically untenable once they are framed by the opposition, civil society, or social movements as evidence of excessive dependence on, or capture by, the PRC. This domestic-politics dimension is essential for understanding why economic agreements that produced limited material gains nonetheless generated disproportionate political backlash, as discussed in Section 4.

THE STRATEGIC ALLIANCE KMT–CCP AND THE STABILIZATION OF CROSS-STRAIT RELATIONS

The presidential election campaign of 2004—at the conclusion of which Chen Shui-bian was reelected—was fundamentally centered on the issue of Taiwanese national identity,



underscoring the central role this question plays in Taiwan's domestic politics. The Democratic Progressive Party (DPP) structured its campaign around the promotion of Taiwanese nationalism, constitutional reform, and accusations that the opposition was corrupt and excessively "pro-China." KMT, by contrast, focused its electoral strategy on economic performance and the preservation of cross-strait stability. Although Chen's first term in office (2000–2004) was marked by weak economic performance, the DPP's emphasis on Taiwanese nationalism proved decisive in securing victory (Cheng, 2007). The national identity issue had also played a critical role in the elections of 1996 and 2000, compelling KMT policymakers to reassess their political strategy in order to regain power.

The DPP's renewed electoral victory in 2004 similarly forced the People's Republic of China (PRC) to reassess its Taiwan policy. Under the Jiang Zemin administration (1993–2003), Beijing had pursued short-term unification through coercive strategies, including military threats intended to intimidate Taiwanese public opinion. These policies, however, proved counterproductive, contributing to unfavorable outcomes for Beijing in the Taiwanese elections of 1996, 2000, and 2004. Following Hu Jintao's rise to power, the PRC articulated a revised foreign policy framework known as "peaceful development" (和平發展), which also reshaped its approach toward Taiwan. Seeking greater flexibility and pragmatism, Beijing adopted a "cross-strait peaceful development" (兩岸和平發展) strategy in 2004, prioritizing the stabilization of cross-strait relations, the neutralization of pro-de jure independence political forces in Taiwan, and cross-strait economic integration, rather than the immediate pursuit of unification (Huang, 2017, p. 243; Wang W., 2016, p. 22–25).

The need to recalibrate political strategies ultimately led the KMT and the Chinese Communist Party (CCP) to coordinate against the DPP. Prior to 2004, the KMT had refused to engage in political dialogue with Beijing due to the CCP's insistence on being recognized as the sole legitimate government of China and its attempts to downgrade the ROC government in Taiwan to a mere "provincial" authority—an arrangement unacceptable to the KMT. To establish common ground for dialogue, both parties revived the concept of the "1992 Consensus" (九二共識), under which both sides acknowledged the existence of "one China," to which both the mainland and Taiwan belong, thereby granting political parity to the ROC and the PRC. Nevertheless, this formulation was interpreted differently by each side: for the KMT, "one China" referred to the Republic of China, whereas for the CCP it referred to the People's Republic of China. In Taiwan, this arrangement became known as "one China, respective interpretations" (一個中國 · 各自表述; abbreviated as 一中 · 各表) (Yan, 2010, p. 76–77; Wang W., 2016, p. 26–27). The consensus temporarily neutralized the sovereignty dispute, creating the necessary conditions for cross-strait cooperation (Yan, 2010, p. 83–85).

In May 2004, three days prior to the inauguration of Chen's second term, the PRC's Taiwan Affairs Office (TAO) issued a statement condemning the DPP's pro-de jure independence activities. Notably, however, the statement employed—for the first time—the formulation that “there exists only one China, and both the mainland and Taiwan belong to one China,” without explicitly identifying the PRC as that China. The statement also called for the elimination of barriers, the enhancement of mutual trust, and the expansion of cross-strait exchanges in areas such as trade, currency exchange, and tourism, with the stated long-term objective of peaceful unification (Lin, 2016, p. 3; Taiwan Affairs Office, 2004; Wang W., 2016, p. 22). This declaration signaled a shift in Beijing's priorities: preventing de jure Taiwanese independence became paramount, while political negotiations were deferred in favor of economic and cultural integration (Huang, 2017, p. 240).

Against this backdrop, KMT chairman Lien Chan undertook a historic visit to mainland China in 2005, meeting CCP General Secretary Hu Jintao in Beijing—the highest-level interaction between the two parties since 1945. During the visit, the KMT and the CCP reached several agreements, including reaffirmation of the 1992 Consensus, opposition to “Taiwan independence”, and a shared commitment to peace and stability in the Taiwan Strait. Both parties also pledged to promote economic cooperation, expand Taiwan's international space, and establish a platform for sustained communication and collaboration. Since then, the two parties have convened annually at the “KMT–CCP Forum” (國共論壇), aimed at promoting cross-strait economic, trade, and cultural exchanges (Xinhua News Agency, 2005). The establishment of this KMT–CCP alignment shortly after the promulgation of the Anti-Secession Law in 2005 conveyed a clear signal to the Taiwanese electorate that Beijing was prepared to negotiate exclusively with the KMT, inaugurating a long-term framework of inter-party cooperation. While the KMT sought to consolidate power through economic growth and political stability, the PRC viewed economic integration as a strategy to gradually absorb Taiwan economically.

During Chen Shui-bian's second term (2004–2008), the KMT benefited significantly from a series of corruption scandals involving the Chen family in 2006, which severely undermined the administration's credibility and public support. These scandals compounded the government's weak economic and political performance, accelerating the DPP's decline. In this context, the KMT presented itself as an alternative to DPP governance, emphasizing anti-corruption, economic revitalization through integration with the mainland, and the maintenance of stable relations with both the United States and the PRC—an approach that received tacit support from Washington and Beijing alike (Matsuda, 2015, p. 6). In March 2008, KMT candidate Ma Ying-jeou was elected president of the ROC, securing an absolute legislative majority and marking the party's return to power.

To reduce cross-strait tensions and cultivate a cooperative political environment, the Ma administration adopted a series of goodwill measures toward Beijing while deliberately avoiding sensitive sovereignty issues, instead prioritizing economic and diplomatic agreements. This



approach was officially described as a strategy of “easy tasks first, difficult ones later” (先易後難), or “economics first, politics later” (先經後政) (Matsuda, 2015, p. 23; Yan, 2009, p. 4; Yan, 2010, p. 70).

In his inaugural address in May 2008, Ma adopted a cautious posture toward Beijing, pledging adherence to the “three no’s” (三不) policy—no unification (不統), no independence (不獨), and no use of force (不武)—to preserve the cross-strait status quo (現狀). Simultaneously, he employed conciliatory rhetoric, referring to mainland Chinese as “compatriots” (同胞), asserting that “both sides of the Strait belong to the Chinese nation” (兩岸人民同屬中華民族), reaffirming commitment to the 1992 Consensus and “one China, respective interpretations,” and calling for expanded economic, trade, and cultural exchanges (Ma, 2008a; Matsuda, 2015, p. 8). Four months later, in an interview with *El Sol de México*, Ma characterized cross-strait relations as “special relations, but not state-to-state relations,” arguing that the ROC Constitution does not permit the existence of another country within its territory (Ma, 2008b; Yan, 2010, p. 68–69).

Cross-strait negotiations intensified during Ma’s presidency. Shortly after assuming office, Ma resumed talks between the Strait Exchange Foundation (SEF) and the Association for Relations Across the Taiwan Straits (ARATS), which had been suspended since 1999. Between 2008 and 2016, the two institutions conducted eleven rounds of high-level negotiations. Informal exchanges also expanded: beyond maintaining the KMT–CCP Forum, Ma frequently dispatched KMT representatives to engage CCP leaders at international venues such as the Boao Forum and APEC meetings. Between 2013 and 2015, the PRC’s Taiwan Affairs Office and the ROC’s Mainland Affairs Council—both ministerial-level agencies—held direct and regular high-level talks for the first time in history (Lin, 2016, p. 6; Matsuda, 2015, p. 28–29; Yan, 2011, p. 41).

To further signal goodwill, the Ma administration adopted a number of confidence-building measures. In his first year, Ma froze arms purchases from the United States (Yan, 2010, p. 85). In December 2008, the ROC Ministry of National Defense announced a gradual transition from conscription to an all-volunteer force, citing improved resource allocation and a focus on military modernization (Yan, 2009, p. 6–8). In a 2010 interview with CNN, Ma declared, “we will never ask the Americans to fight for Taiwan” (Evans, 2010). Defense expenditures as a share of GDP declined from 2.16% in 2009 to 1.75% in 2016 (DGBAS, 2016). Additionally, Ma denied entry visas to pro-separatist figures such as the Dalai Lama (2008) and Rebiya Kadeer (2009) (Yan, 2010, p. 85).

Amid the improvement of cross-strait relations, Hu Jintao reaffirmed in December 2008 the proposals he had initially presented to Lien Chan in 2005. These included adherence to the “one China” principle, the deepening of economic cooperation, the expansion of people-to-people exchanges, the promotion of Chinese culture, and negotiations over Taiwan’s participation in the international community. Hu further suggested that both sides “begin discussions on political

relations under special conditions prior to unification in a pragmatic manner” (Hu, 2008; Lin, 2016, p. 4).

THE “REVIVAL” OF THE REPUBLIC OF CHINA AND THE DIPLOMATIC TRUCE

Since the political liberalization reforms of the late 1980s, the question of Taiwanese national identity has played a decisive role in Taiwan’s domestic politics, constituting the principal point of divergence between the KMT and DPP. During the DPP administrations, President Chen Shui-bian sought to construct an independent Taiwanese national identity as part of a broader nation-building project, with the explicit objective of generating political support for de jure independence. This strategy provoked strong opposition from both the People’s Republic of China (PRC) and the KMT. After Ma Ying-jeou assumed office in 2008, however, his administration implemented a series of measures aimed at reversing these policies.

The Taiwanese national identity question emerged in the aftermath of World War II. Following Taiwan’s retrocession to China in 1945, the island experienced a process of “re-Sinicization” (中國化), intended to eradicate the influence of five decades of Japanese colonial rule. This process intensified after the rise of the Taiwanese independence movement and the transfer of the ROC’s central government to Taiwan in the late 1940s. During the period of martial law (1949–1988), as part of the KMT’s national campaign to “recover the mainland” (光復大陸), the state actively suppressed Taiwanese cultural identity and local languages, replacing them with a Chinese cultural identity centered on Mandarin. At the same time, the regime promoted anti-communist ideology and party indoctrination in order to legitimize the ROC/KMT government and cultivate a Chinese national consciousness among the population (Li C.H., 2017, p. 137–139).

Following the lifting of martial law, Taiwan gradually shifted in the 1990s toward a “nativization movement” (本土化運動), which promoted Taiwanese cultural identity. Under the DPP administration (2000–2008), Chen Shui-bian accelerated this process through an assertive and ideologically driven campaign of “de-Sinicization” (去中國化), closely tied to his pro-de jure independence agenda. During this period, the government implemented policies such as the promotion of Taiwanese languages in schools, the introduction of a Taiwan-centered curriculum, the legitimation of Japanese colonial rule, the de-legitimation of the ROC—often portrayed as a form of “Chinese colonial rule”—and the advancement of the so-called “name rectification movement” (正名運動) (Li C.H., 2017, p. 139–141; Liu W.B., 2010, p. 32–37).

After Ma assumed office in 2008, his administration introduced a series of measures designed to reverse the DPP’s de-Sinicization policies. From the KMT’s ideological perspective, the ROC’s national identity is rooted in the *zhonghua minzu* (中華民族) concept, according to which both Taiwan and the mainland belong to a single China. The KMT further argued that any future unification should occur under a democratic China and in accordance with the ROC Constitution. Although the KMT no longer sought to overthrow the Chinese Communist Party (CCP) regime on

the mainland, Ma's national identity policy aimed to re-Sinicize the ROC, eradicate the DPP's political legacy, restore Chinese identity, and re-legitimize the ROC government in Taiwan. These efforts were intended to weaken the DPP's political platform and consolidate support for the KMT (Chen D.P., 2017, p. 109–111; Li C.H., 2017, p. 141–143; Yan, 2010, p. 70–71).

During the DPP administration, Chen promoted the “name rectification movement” to emphasize Taiwan's separateness from China. The campaign encouraged the use of the term “China” (中國) to designate the PRC rather than “the mainland” (大陸), as well as the informal use of “Taiwan” to refer to the government instead of “the ROC.” Moreover, numerous state-owned enterprises, public spaces, and government agencies removed the term “China” from their names. For example, the “Chinese Petroleum Corporation” was renamed “CPC Corporation, Taiwan,” “Chunghwa Post” became “Taiwan Post,” and the “Overseas Chinese Affairs Commission” was renamed the “Overseas Compatriots Affairs Commission.” After Ma took office, however, most of these changes were reversed (Liu W.B., 2011, p. 27–28).

Ma's administration also sought to reverse the DPP-era curriculum reforms in order to reinforce Chinese identity and re-legitimize the ROC, particularly among younger generations. These reforms included the reintroduction of a Chinese-centered curriculum, the teaching of Confucian classics, the reaffirmation of the ROC as a Chinese state, the de-legitimation of Japanese rule, the legitimation of ROC governance in Taiwan, and renewed emphasis on the KMT's historical legacy—especially economic development and Chiang Kai-shek's role in “protecting” Taiwan from communism (Chen D.P., 2017, p. 114–117).

In the realm of foreign policy, previous ROC administrations (1988–2008) had unsuccessfully attempted to expand Taiwan's international space through an assertive strategy known as “pragmatic diplomacy” (務實外交). Under this approach, Taipei relied heavily on financial incentives to secure diplomatic recognition, reflecting its inability to counterbalance the PRC's rise as a global power. After taking office in 2008, Ma proposed a new foreign policy framework to Beijing known as the “diplomatic truce” (外交休兵), also referred to as *modus vivendi* or “viable diplomacy” (活路外交). Under this arrangement, the ROC would refrain from diplomatic confrontation with Beijing in exchange for PRC goodwill and limited expansion of Taiwan's international space (Liao, 2015).

During the period of pragmatic diplomacy, Taiwan's foreign policy was largely based on “checkbook diplomacy,” leading to bidding wars between Taipei and Beijing over diplomatic recognition by developing countries. As the PRC's global influence expanded, this strategy became increasingly unsustainable, as Beijing was able to outbid and outmaneuver Taipei. Consequently, Ma abandoned checkbook diplomacy. In response, the PRC suspended its diplomatic offensives against Taiwan's remaining allies. As a result, several ROC allies—including Paraguay, Panama, Nicaragua, and Honduras—attempted to switch recognition from Taipei to Beijing, only to have their overtures rejected by Beijing itself. This shift allowed Ma to significantly reduce the budget

allocated to maintaining diplomatic allies (Lee M., 2011, p. 199; Liao, 2015, p. 186; Lin, 2016, p. 3; Tsai G.W., 2011, p. 127).

In 2009, Ma further announced that the ROC would suspend its annual bid for United Nations membership after sixteen consecutive failed attempts. In return, the PRC made limited concessions regarding Taiwan's international participation, allowing Taipei to join certain international organizations where statehood was not a prerequisite. Taiwan was permitted to attend the World Health Assembly (WHA) from 2009 to 2016 and to participate as an observer in the International Civil Aviation Organization (ICAO) in 2013, both under the name "Chinese Taipei" (中華台北) (Lee M., 2011, p. 202; Liao, 2015, p. 188; Tsai G.W., 2011, p. 128).

Moreover, on several occasions the PRC refrained from objecting to Taiwan's limited international visibility. In 2009, Ma attended the opening ceremony of the World Games in Kaohsiung and briefly met with U.S. Secretary of State Hillary Clinton in Panama (Tsai G.W., 2011, p. 129–130). Ma also conducted multiple visits to the United States while traveling to Taiwan's diplomatic allies in Latin America, meeting with U.S. officials. Additionally, he dispatched former vice presidents Lien Chan and Siew Wan-chang as Taipei's special envoys to the APEC leaders' meetings (Lee M., 2011, p. 201). During this period, the PRC did not oppose the extension of visa-free access to ROC passport holders, increasing the number of visa-exempt countries from 54 in 2008 to 164 in 2016 (Liao, 2015, p. 185).

Despite these developments, the PRC's concessions remained limited, and Beijing continued to de facto isolate Taiwan from the international community. Throughout Ma's administration, Beijing pressured states, international organizations, non-governmental organizations, and multinational corporations to adhere to the "one China principle." This resulted in incidents such as refusals to host ROC representative offices, the deportation of ROC citizens to the mainland rather than Taiwan, and pressure to label Taiwan as "Taiwan, China" or "Taiwan, Province of China" (Liao, 2015, p. 189–193). The PRC also expanded its influence over Taiwan's diplomatic allies through soft power, financial assistance, and infrastructure investment (Hornby; Cohen, 2013).

In 2013, Taiwan sought participation in the United Nations Framework Convention on Climate Change and the International Meteorological Organization, but these efforts were blocked by PRC opposition (Liao, 2015, p. 189–193). In 2015, Ma attempted to secure Taiwan's participation in the Asian Infrastructure Investment Bank (AIIB), but the application was ultimately withdrawn due to unresolved sovereignty issues (BBC, 2016). In 2014, Ma also requested to attend the APEC leaders' meeting as the first sitting ROC president, with the aim of holding a historic encounter with PRC President Xi Jinping. Beijing rejected the request, arguing that there was "no need" for such a meeting to take place in an international forum (Liu C. Y.; Liu J., 2014).

FROM THE CROSS-STRAIT COMMON MARKET TO THE REINFORCEMENT OF THE "TWO CHINAS" FRAMEWORK



During the 2008 presidential campaign, Ma Ying-jeou sought to reverse the ROC's economic slowdown and wage stagnation by proposing the so-called "633" (六三三) targets. These goals envisaged an average annual GDP growth rate of 6%, a GDP per capita of USD 30,000, and an unemployment rate of 3%, with the explicit promise of improving living standards. To achieve these objectives, Ma adopted an economic strategy centered on cross-strait economic integration, expecting that closer economic ties with the mainland would expand ROC exports and generate employment—particularly in the industrial sector.

The first major policy adopted by Ma's administration was the removal of virtually all restrictions on cross-strait exchanges. Within his first year in office, Ma announced the establishment of the "three links" (三通), allowing direct transportation, trade, and postal exchanges across the Taiwan Strait for the first time since 1949. Simultaneously, most restrictions on mainland tourists visiting Taiwan were lifted. As a result, the number of mainland tourists increased dramatically, from 288,000 in 2008 to 4.14 million in 2015 (or 5.65 million when including visitors from Hong Kong and Macau), accounting for approximately 54% of Taiwan's total inbound tourists that year (MAC, 2016).

In parallel, Ma intensified institutionalized cross-strait negotiations through the SEF–ARATS framework in order to secure favorable economic agreements. In 2010, following five rounds of negotiations, both sides signed the Economic Cooperation Framework Agreement (ECFA), a preferential trade arrangement that eliminated tariffs on 539 Taiwanese products and 267 mainland products (Tsai; Liu, 2017, p. 19). Between 2009 and 2013, Ma's administration also relaxed restrictions on mainland investment in Taiwan, opening 176 sectors—including banking, insurance, and selected high-technology industries such as semiconductors and LCD panels—to PRC capital (Lee; Yin, 2017).

Nevertheless, political stabilization and the signing of the ECFA failed to produce a sustained expansion of Taiwanese exports to mainland China or other markets. Ma's administration attempted to secure access for Taiwanese technology firms—particularly in emerging sectors such as smart cities, LED lighting, and LCD manufacturing—but Beijing showed little interest in opening its domestic market, preferring instead to cultivate indigenous industries (Fuller, 2018, p. 216–220). Moreover, weak global demand following the 2008 financial crisis, declining innovation capacity within Taiwan's high-tech sector, and intensified competition stemming from the PRC's technological catch-up further contributed to export stagnation. Although exports rebounded in 2010 after a sharp contraction in 2009, they stagnated between 2011 and 2014 and declined again in 2015 (Chiang, 2016).

Similarly, the liberalization of mainland investment failed to correct the structural imbalance in cross-strait capital flows. According to Lee (2017), limited PRC investment in Taiwan resulted from multiple factors, including stringent visa regulations for mainland entrepreneurs, the relatively small size of the Taiwanese consumer market, declining innovation capacity in high-tech industries, and continued restrictions on PRC investment in strategic sectors—most notably

semiconductors—due to national security concerns (Lee, 2017, p. 39–40; 49–52). Despite Ma’s efforts to attract mainland capital, PRC investment in Taiwan totaled only USD 244 million in 2015, representing approximately 5% of total foreign direct investment (FDI). In contrast, Taiwanese investment in the mainland reached nearly USD 10 billion during the same period (MOEA, 2018).

Following the establishment of the diplomatic truce with Beijing in 2008, Ma’s administration expected that the PRC would refrain from obstructing Taipei’s attempts to diversify its trade partnerships through bilateral free trade agreements—particularly with ASEAN members—and participation in multilateral frameworks such as the Trans-Pacific Partnership (TPP). These efforts, however, were largely thwarted by Beijing, which sought to maintain Taiwan’s economic dependence on the mainland (Tsai; Liu, 2017, p. 20–25). During this period, the PRC only tolerated the signing of FTAs with New Zealand and Singapore in 2013, agreements that yielded limited export gains for Taiwan (Wang, 2012, p. 147). Ma repeatedly expressed public frustration over Beijing’s obstruction (Chen, 2014).

During Ma’s first term (2008–2012), sensitive political issues—particularly sovereignty—were deliberately avoided to preserve cross-strait stability and prioritize economic cooperation. After securing reelection in 2012, Ma sought to establish a minimal political consensus as a foundation for long-term peace talks, under conditions acceptable to Taipei. These efforts ultimately failed due to irreconcilable political differences between the KMT and the Chinese Communist Party (CCP), resulting in stagnation in cross-strait relations.

Shortly after his reelection, Ma dispatched KMT honorary chairman Wu Po-hsiung to meet Hu Jintao at the KMT–CCP Forum in Beijing. Wu emphasized the importance of the “1992 Consensus” and argued that cross-strait relations were governed by the ROC’s *Act Governing Relations between the People of the Taiwan Area and the Mainland Area*, which rests on the legal concept of “one country, two areas.” Hu offered no public response (Chuang, 2012).

In his second-term inaugural address in May 2012, Ma reaffirmed the “three noes,” the “1992 Consensus,” and the principle of “one China, respective interpretations,” while explicitly endorsing Wu’s formulation. Ma declared that the ROC Constitution constituted the supreme framework for managing cross-strait relations, asserting that “one China” referred to the ROC and that its constitutional territory encompassed both Taiwan and the mainland. He further proposed a framework of “mutual non-recognition of sovereignty and mutual non-denial of governing authority,” aimed at stabilizing relations while preserving de facto statehood (Ma, 2012).

Four days later, Ma elaborated on this concept, drawing inspiration from the 1972 Basic Treaty between East and West Germany, which distinguished sovereignty from governing authority and institutionalized mutual non-denial (Chang, 2012). For the first time since taking office, Ma explicitly reaffirmed ROC sovereignty and called for the normalization of cross-strait relations on a de facto “state-to-state” basis.

Beijing reacted with disappointment, having anticipated progress toward political negotiations (Wang, 2012, p. 139). In July 2012, CPPCC Chairman Jia Qinglin reiterated that cross-

strait relations were “not relations between states” and urged tolerance of differences (Jia, 2012; MATSUDA, 2015, p. 26). Xi Jinping echoed this position in April 2013, invoking the “Chinese Dream of national rejuvenation” (Xi, 2013a). By October 2013, Xi warned that unresolved political differences could not be indefinitely postponed (Huang, 2017, p. 243; Xinhua News Agency, 2013b), a sentiment reinforced days later by TAO Director Zhang Zhijun (Zhang, 2013).

Ideological divergence further constrained cross-strait engagement. In 2011, Ma refused joint commemorations of the Xinhai Revolution due to Beijing’s refusal to acknowledge the ROC’s founding significance (Xinhua News Agency, 2010). Similarly, in 2015, Taipei declined Beijing’s invitation to jointly commemorate the 70th anniversary of Japan’s surrender, accusing the CCP of appropriating KMT historical credit (BBC, 2015).

Taipei also resisted PRC initiatives perceived as advancing a “one country, two systems” framework, such as the Pingtan Comprehensive Experimental Zone proposed in 2012 (Fan, 2012). Ma’s administration further adopted positions that openly challenged Beijing, including permitting visits by the Dalai Lama (2009) and dissident Chen Guangcheng (2013), and maintaining U.S. arms purchases.

Amid escalating regional tensions in the Asia-Pacific, Beijing urged Taipei to cooperate in defending “Chinese territory.” Ma declined and instead pursued initiatives aimed at expanding Taiwan’s international space, including the East China Sea Peace Initiative (2012) and the South China Sea Peace Initiative (2015), both ignored by Beijing (Lan, 2014; Taylor, 2016, p. 95–100). Ma also concluded bilateral fisheries agreements with Japan (2013) and the Philippines (2015) without PRC mediation (Chase, 2016, p. 90–93). In 2016, he reaffirmed ROC territorial claims by visiting Taiping and Pengchia islands, underscoring Taiwan’s autonomous posture (BBC, 2016).

THE CRISIS AND COLLAPSE

Although Ma Ying-jeou’s administration achieved some meaningful economic agreements and obtained limited diplomatic concessions, his domestic popularity eroded steadily after 2008. Three main factors contributed to this decline: first, persistent income inequality and wage stagnation; second, the continued rise of a distinct Taiwanese national identity; and third, the growing economic and political influence of the People’s Republic of China (PRC) within Taiwan. Together, these dynamics decisively undermined public support for Ma’s government and ultimately contributed to the KMT’s electoral defeat in 2016.

Despite substantial gains in labor productivity since the 1990s, real wages in Taiwan remained largely stagnant, while the Gini coefficient increased from 0.31 to 0.34. Wage stagnation resulted primarily from the gradual relocation of industrial production to the mainland beginning in the 1990s, which displaced labor into low-productivity sectors, particularly services. The adoption of neoliberal reforms—such as capital liberalization and tax reductions—disproportionately benefited speculative capital and real estate investment. Combined with strong industrial lobbying against minimum wage increases and the absence of robust welfare policies, these trends contributed to prolonged real wage stagnation (Chang et al., 2014). Over the eight

years of Ma's administration, cumulative real wage growth amounted to only 3.08% (DGBAS, 2016).

Another critical factor in the erosion of Ma's popularity was the transformation of Taiwanese national identity. Since the late 1990s, patterns of self-identification in Taiwan have shifted rapidly. The proportion of the population identifying exclusively as Taiwanese increased from 17.6% in 1994 to 60.6% in 2015. In contrast, identification as Chinese or dual Chinese–Taiwanese declined from 26.2% and 44.6% in 1994 to just 3.3% and 33.3% in 2015, respectively. This generational and societal shift—particularly pronounced among younger cohorts—generated growing resistance to the KMT's *Zhonghua Minzu* identity framework and to Ma's mainland-friendly policy orientation.

Public opinion was further shaped by the PRC's expanding economic presence in Taiwan. As the mainland market gained importance after 2000, several prominent *Taishang* (臺商), or Taiwanese entrepreneurs operating in China, began openly endorsing the “1992 Consensus.” These figures included Kuo Tai-ming (Hon Hai Precision), Wang Hsueh-hung (HTC), and even former sympathizers of the DPP, such as Chang Rong-fa (Evergreen Group) (WANG, 2012, p. 145). Beijing increasingly relied on pro-PRC *Taishang* as instruments of political influence over Taiwanese public discourse. A notable example was Tsai Eng-meng's acquisition of the *China Times* media group in 2008, after which pro-Beijing narratives became more prominent within Taiwanese media (Wu, 2015, p. 12–25). Earlier, in 2005, the PRC had exerted pressure on pro-DPP businessman Hsu Wen-lung (Chimei Corporation), compelling him to suspend his political and financial support for the DPP (Chiu, 2005). These developments reinforced public perceptions that excessive PRC influence posed a threat to ROC sovereignty.

The mechanism linking economic policy to social mobilization can be summarized as follows. Cross-strait economic agreements were negotiated and ratified through an institutional process—SEF–ARATS talks followed by expedited legislative review—that offered limited opportunities for public deliberation. As the cumulative effect of these agreements became associated, in public perception, with wage stagnation, rising PRC economic presence, and the political activities of pro-Beijing *Taishang*, the agreements increasingly came to be interpreted not merely as economic instruments but as markers of an erosion of de facto sovereignty. This interpretive shift was made possible by the parallel consolidation of a distinct Taiwanese identity (Section 2): for a population increasingly identifying as exclusively Taiwanese, opaque negotiations over deeper economic integration with the mainland were read through a sovereignty-and-identity frame rather than a purely economic one. It was this convergence—material grievance, identity framing, and a perceived deficit of democratic deliberation—that transformed the CSSTA from a routine trade agreement into the trigger of the Sunflower Student Movement.

Against the backdrop of declining public support, Ma's administration signed the Cross-Strait Service Trade Agreement (CSSTA) with the PRC in 2013. Under the agreement, Taiwan committed to liberalizing 64 service sectors for mainland investment, while the PRC agreed to open 80 sectors to Taiwanese firms (Lee, 2017, p. 41). The CSSTA was widely criticized for

disproportionately benefiting large financial and business conglomerates at the expense of small and medium-sized enterprises, exacerbating labor market pressures by exposing domestic firms to mainland competition, and creating national security risks by opening sensitive sectors such as media and telecommunications to PRC capital (Chang; Yen, 2013; Chen; Ku, 2014). In this sense, the Sunflower Movement is best understood not as an isolated reaction to a single agreement, but as the point at which the cumulative tensions generated by Ma's economic statecraft strategy—asymmetric dependence, identity divergence, and procedural opacity—became politically manifest.

In March 2014, the KMT—then holding a legislative majority—attempted to fast-track the CSSTA through the Legislative Yuan without substantive public deliberation. In response, student groups occupied the legislature, demanding a clause-by-clause review of the agreement. This mobilization became known as the Sunflower Student Movement (太陽花學運). After three weeks of occupation and sustained public pressure, the KMT suspended the ratification process indefinitely (Lu, 2014).

The episode had profound consequences for both cross-strait relations and the KMT's domestic standing. In June 2014, Zhang Zhijun, Director of the PRC's TAO, visited Taiwan and was met with large-scale protests in major cities (Lin, 2016, p. 10–11). In September 2014, Xi Jinping responded by accusing pro-de jure independence forces in Taiwan of obstructing cross-strait cooperation and threatening peaceful development, declaring that Beijing would “never tolerate any act of dividing the country” (Huang, 2017, p. 244). Reflecting Ma's declining legitimacy, the KMT suffered a crushing defeat in the 2014 local elections, losing control of key municipalities—including Taipei, Taoyuan, and Taichung—and prompting Ma's resignation as party chairman (Matsuda, 2015, p. 31).

As a final effort to reverse political decline and bolster the KMT's prospects ahead of the 2016 presidential election, Ma Ying-jeou and Xi Jinping held a historic summit in Singapore in November 2015—the first meeting between the leaders of both sides since 1949. Despite its symbolic significance, the meeting produced no substantive political agreements, and the sovereignty issue remained unresolved (Wang, 2015). The Ma–Xi summit failed to shift domestic public opinion. In January 2016, Tsai Ing-wen was elected president with 56.1% of the vote, while KMT candidate Chu Li-lun secured only 31%. For the first time in Taiwan's history, the DPP also obtained a legislative majority (68 out of 113 seats), consolidating control over both the executive and legislative branches (Li, 2016).

CONCLUSION

It is undeniable that the historical KMT–CCP alliance succeeded in expanding cross-strait exchanges and significantly reducing tensions. Ideologically, however, both parties remained unable to overcome their fundamental political differences. Although the policies adopted by the Ma administration were strategically calibrated to Taiwan's political conditions at the time—aiming to extract political and economic concessions from Beijing—the Ma era produced limited



contributions to the consolidation of cross-strait peace, sustainable economic development, or the reduction of Taiwan's international isolation. The failure of Ma's China policy was therefore decisive in the KMT's electoral defeat in 2016.

The political legacy of the Ma administration was consequently quite limited. This outcome resulted largely from Beijing's capacity to "neutralize" Ma's China policy strategy by maintaining Taipei's international isolation and preventing the ROC from diversifying its trade partnerships, thereby reinforcing Taiwan's economic dependence on the mainland. When Ma assumed office in 2008, his administration was fully aware that Taiwan's meaningful participation in the international community and deeper integration into the global economy would be impossible without first addressing relations with Beijing. Recognizing this structural constraint, Ma adopted a strategy aimed at temporarily neutralizing the sovereignty issue in order to capitalize on Beijing's goodwill and extract the maximum possible economic and diplomatic concessions.

Nevertheless, Ma's China policy failed to increase Taiwanese exports, which remained heavily dependent on the mainland market. Moreover, the diplomatic concessions offered by Beijing proved to be highly fragile. Following the DPP electoral victory in 2016, Beijing excluded Taiwan from the World Health Assembly (WHA) and the International Civil Aviation Organization (ICAO), while simultaneously resuming diplomatic offensives against Taiwan's remaining allies. Between May 2016 and February 2019, Taipei lost five diplomatic allies to Beijing, reducing the ROC's total number of formal diplomatic partners to just 17.

During this period, public opinion played a crucial role in sustaining the cross-strait status quo. According to a 2017 survey conducted by the Election Study Center, 58.4% of respondents favored maintaining the status quo either temporarily or indefinitely; 10.1% preferred to maintain the status quo while moving toward unification; and 17.2% preferred to maintain the status quo while moving toward independence. By contrast, only small minorities supported immediate unification (2.2%) or immediate independence (5.0%). These findings suggest that, given concerns over the risk of military conflict in the Taiwan Strait, the status quo remained the most acceptable option among the Taiwanese population (ELECTION STUDY CENTER, 2018b). Although the Ma administration did not pursue unification with the PRC, its efforts to deepen cross-strait economic integration generated strong public resistance—particularly among younger voters—culminating in the student protests of 2014 and the collapse of Ma's domestic popularity.

Like his predecessors, Ma ultimately failed to resolve the Taiwan question. While the KMT and the CCP shared certain commonalities—such as cultural and ethnic identity—the alliance forged between the two parties served a singular political purpose: countering the DPP and the Taiwanese independence movement. Officially, the KMT maintained a position centered on preserving ROC sovereignty in Taiwan. Yet Ma was unable to persuade Beijing to engage in cross-strait negotiations under Taipei's terms. After securing economic concessions and winning reelection in 2012, Ma attempted—unsuccessfully—to advance cross-strait political talks on a de facto "state-to-state" basis. These initiatives were firmly rejected by Beijing, which remained uncompromising on the sovereignty issue and continued to insist that the "one country, two



systems” model represented the only acceptable framework—conditions that were fundamentally unacceptable to Taipei. As a result, cross-strait political dialogue stagnated.

Over the eight years of Ma Ying-jeou’s administration, Taiwan neither moved toward unification with the PRC nor pursued de jure independence. Instead, Ma sought—ultimately unsuccessfully—to consolidate the cross-strait status quo by preserving Taiwan as a de facto independent ethnic Chinese political entity operating under the name of the ROC. This failure underscored the structural limits of engagement-based strategies under conditions of asymmetric power and unresolved sovereignty disputes in the Taiwan Strait.

Read through the lens of economic statecraft and asymmetric interdependence, the Ma era illustrates the limits of using economic engagement as leverage from a position of structural weakness. While Ma's strategy succeeded in generating short-term diplomatic gestures and a temporary stabilization of cross-strait relations, it did not alter the underlying asymmetry between the two economies, and Beijing retained—and ultimately exercised—the capacity to withdraw concessions once the political conditions changed after 2016. At the same time, the domestic trajectory of the period suggests that asymmetric economic engagement is not merely an interstate variable: it interacts with domestic identity formation and party competition in ways that can generate political backlash sufficient to reverse the very policy that produced the engagement in the first place. The Ma case thus offers a cautionary illustration of how economic statecraft pursued by a weaker actor may simultaneously fail to durably alter the external balance of leverage and destabilize the domestic political coalition that initiated it.

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