



# Taiwan's 2024 presidential election and its candidates

What to expect in foreign policy and cross-Strait relations?

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## Executive summary

Election campaigns for Taiwan's upcoming presidential and parliamentary elections next January are already in full swing. Three parties have fielded their candidates for Taiwan's top political job and their profiles could not be more different. Only one candidate, Vice President Lai Ching-te from the Democratic Progressive Party (DPP), can draw on extensive experience in national politics, international negotiations, and diplomatic affairs. The other two contenders—Hou Yu-ih from the Nationalist Party (KMT) and Ko Wen-je from the recently founded Taiwan People's Party (TPP)—had long and successful careers in medicine and law enforcement, respectively, before they embarked on careers in politics in the 2010s. As mayors of two big and important northern municipalities, Taipei City and New Taipei City, the two enjoy high popularity but lack experience in local politics and subnational diplomacy. The three candidates' stances on foreign policy, cross-Strait relations, and related policy matters overlap but their approaches are distinct, as would be the consequences for Taiwan depending on who comes out victorious. The findings of our analysis can be summarized as follows:

- For the first time in the history of Taiwan's democratic elections, all presidential candidates share a Taiwanese background (*benshengren*), meaning they are descended from those who settled on the island prior to or during the Japanese colonization. That includes Hou, the presidential candidate of the KMT, a party whose members and voters have historically had a family background that reflects migration from the mainland during and in the aftermath of the Chinese Civil War (1945-1949). This is one but not the only reason why Hou lacks unequivocal support within the party and its voter base.
- All candidates adopt a moderate, "pragmatic" approach in cross-Strait relations, advocating for the maintenance of Taiwan's status quo: that is, *de facto* autonomy of Taiwan under the denomination of the Republic of China (ROC) without seeking formal independence nor accepting unification with the People's Republic of China (PRC) ruled by the Chinese Communist Party (CCP) and its proposed model of "one country, two systems". Ko's pragmatism is not bounded by ideology, whereas Hou and Lai are struggling to match their own versions of pragmatism with the ideologies of their respective parties

(or factions). Hou is the only candidate to endorse the controversial “1992 Consensus” that Beijing has set as a precondition for resuming official dialogue with Taiwan. Moreover, through powerful representatives of the deep-Blue faction within the KMT Hou has guaranteed access to the Chinese leadership. However, these connections come with liabilities and could eventually affect foreign relations with the United States and Japan.

- Defense policy has gained particular momentum in the campaigns for next year’s elections. Candidates agree on the necessity of enhancing Taiwan’s self-defense capacities to deter China and protect Taiwan in the event of a military attack or blockade by the PRC. According to Lai, improving military capabilities and strengthening alliances as well as economic relations with like-minded countries are the key to deterring China from military adventurism. Hou and Ko seek more exchanges in the economy, education, and other fields as well as the resumption of high-level diplomatic dialogue with China to attenuate tensions and maintain peace in the Taiwan Strait. Hou’s detailed deterrence strategy, as outlined in his op-ed in *Foreign Affairs*, is remarkable and has garnered widespread attention. It remains to be seen whether this will affect public perceptions in the upcoming months.
- Candidates have expressed and demonstrated their commitment to Taiwan-US relations with personal visits to the United States. However, Washington has reasons to be skeptical of all three. Lai’s comments have been interpreted by some American observers as signaling a potential deviation from the current moderate policy of President Tsai Ing-wen. Hou lacks familiarity with the United States and depends on influential advisors from the KMT’s moderate faction and their connections in Washington. Import bans of American meat and the prioritization of closer relations with the PRC during the eight years of Ma Ying-jeou’s presidency (2008-2016) still cloud KMT-Washington relations, especially because Ma and his faction continue to exert considerable influence within the party. Ko does not guarantee the United States its position as the undisputed pivot in the strategic triangle between Taiwan, China, and the United States as he stresses the importance of maintaining equally constructive relations with both sides. His comments on managing them in a “dynamic equilibrium” have raised questions about what this would mean in practice. We expect him to handle relations with both the United States and China more flexibly, as Ko is not bound by ideology and factional politics.

- Japan is a critical node and an important ally in Taiwan's relations with other countries in the Indo-Pacific. Bilateral relations have gained fresh momentum in the election campaigns. All candidates have proactively reached out to representatives of the Japanese government, and have either visited Japan themselves (Ko and Hou) or met with Japanese officials who visited Taiwan (Lai). Ko and Hou have capitalized not only on the momentum of a historical shift in Japan's foreign policy, which views the PRC as a growing threat to stability and peace in the region, but also on efforts undertaken by the DPP government and Vice President Lai to substantiate these bilateral relations during the past years. We expect Taiwan-Japan relations to be strengthened under all three presidents, even though Hou's promises are overshadowed by those unfulfilled under former President Ma Ying-jeou.
- Relations with European countries have not featured prominently in the campaigns, but the ongoing war in Ukraine and the EU and NATO's support for Ukraine continue to influence Taiwanese perceptions of security and, thus, the importance of forging close relations with like-minded (that is democratic) countries as part of Taiwan's overall defense and deterrence strategy. Although regional partners, especially Japan, have undisputed priority in foreign relations, we expect candidates to continue to substantiate relations with European countries. Nonetheless, the absence of Taiwan-EU relations in the political discourse and the candidates' decision to not include Brussels or any other European capital with bigger diaspora communities in their travel plans should make EU policymakers reflect their own positions and the extent of their desired influence on geopolitics, the center of which has undoubtedly shifted to the Indo-Pacific.
- At the time of writing, Foxconn founder Terry Gou announced to run as an independent candidate, adding further dynamic momentum to the election campaigns. Gou presented the actress Tammy Lai who became famous in the political drama Wave Makers as his running mate. Due to the lack of party affiliation, the two must collect around 290,000 signatures by 2nd November to be officially admitted by the election authorities. Gou is popular but performs poorly in the public opinion polls. Many observers (including TPP frontrunner Ko) agree that if Gou becomes the fourth candidate, he will further divide the "pan-Blue" vote, thus increasing Lai's chances to win the presidential election.



# Introduction

Presidential and legislative election campaigns in Taiwan are in full swing. Three parties have officially nominated their presidential candidates. The ruling Democratic Progressive Party (DPP) was the first, with Vice President Lai Ching-te nominated in January and confirmed at a party congress in April 2023. The Nationalist Party (KMT) and the Taiwan People's Party (TPP) followed in late May. Hou Yu-ih, mayor of New Taipei City, the third biggest municipality in terms of population after Kaohsiung and Taipei, was nominated as the KMT's presidential candidate and confirmed at the KMT party congress on 23 July. Former Taipei mayor Ko Wen-je is officially running for the TPP. In addition, Foxconn founder and former KMT member Terry Gou (Kuo Tai-ming) declared his intention to run as an independent candidate. He and his running mate, actress Tammy Lai, are currently traveling through the country collecting signatures to secure their bid.

Foreign policy and cross-Strait relations (Taiwan's relationship with China) always loom large over presidential election campaigns, and Taiwanese voters closely scrutinize the candidates' positions on these issues, as well as their proposed policies for domestic issues, such as housing, labor market and energy security. This report provides an overview of each candidate's policy position on foreign and cross-Strait relations. The candidates are tackled in separate sections that first provide a profile and then analyze the candidates' positions and propositions regarding three types of relationships: Taiwan-China relations, Taiwan-US relations, and Taiwan and its neighbors. As Taiwan-EU relations have essentially been absent from the political programs, nor have they been covered in public statements, the report refrains from discussing these relations in depth. Instead, it includes this perspective in the overall discussion and conclusion at the end of the report.

Given Taiwan's paramount role in today's world politics, particularly in US-China relations, it is important for policymakers, investors, and the people of other countries to have a better understanding of Taiwan's political landscape and the potential implications of next January's presidential election for international relations.





# Ko Wen-je

## Profile

Ko Wen-je has a medical background, with more than 30 years of experience as a trauma surgeon and university professor. In medical circles, he is widely recognized as a pioneer of intensive care and organ transplantation in Taiwan, however throughout his career he was implicated in several scandals. Ko became politically engaged in the second half of the 2000s when he began to comment on public affairs in the media. In 2014, he won the Taipei mayoral election, gaining 57.16%<sup>1</sup> of the votes and defeating the KMT candidate Sean Lien. In doing so, he became the first independent mayor of what had traditionally been a KMT stronghold. Ko served two consecutive terms between 2014-2022.

Politically, Ko was previously associated with the China-critical and independence-leaning Green camp. His first candidacy as Taipei mayor was backed by the DPP, which had forfeited the race. He supported the Sunflower Movement and its opposition to the Cross-Strait Services Trade Agreement (CSSTA)<sup>2</sup>, a pact pushed by Ma Ying-jeou of the KMT during his presidency that would have opened up selected service-sector markets in Taiwan to Chinese investments. As the tertiary sector contributes some 60%<sup>3</sup> to Taiwan's GDP, critics regarded it as a threat to Taiwan's local economy and a dangerous over-reliance<sup>4</sup> on China. They also demanded more transparency and oversight<sup>5</sup> in cross-strait agreements.

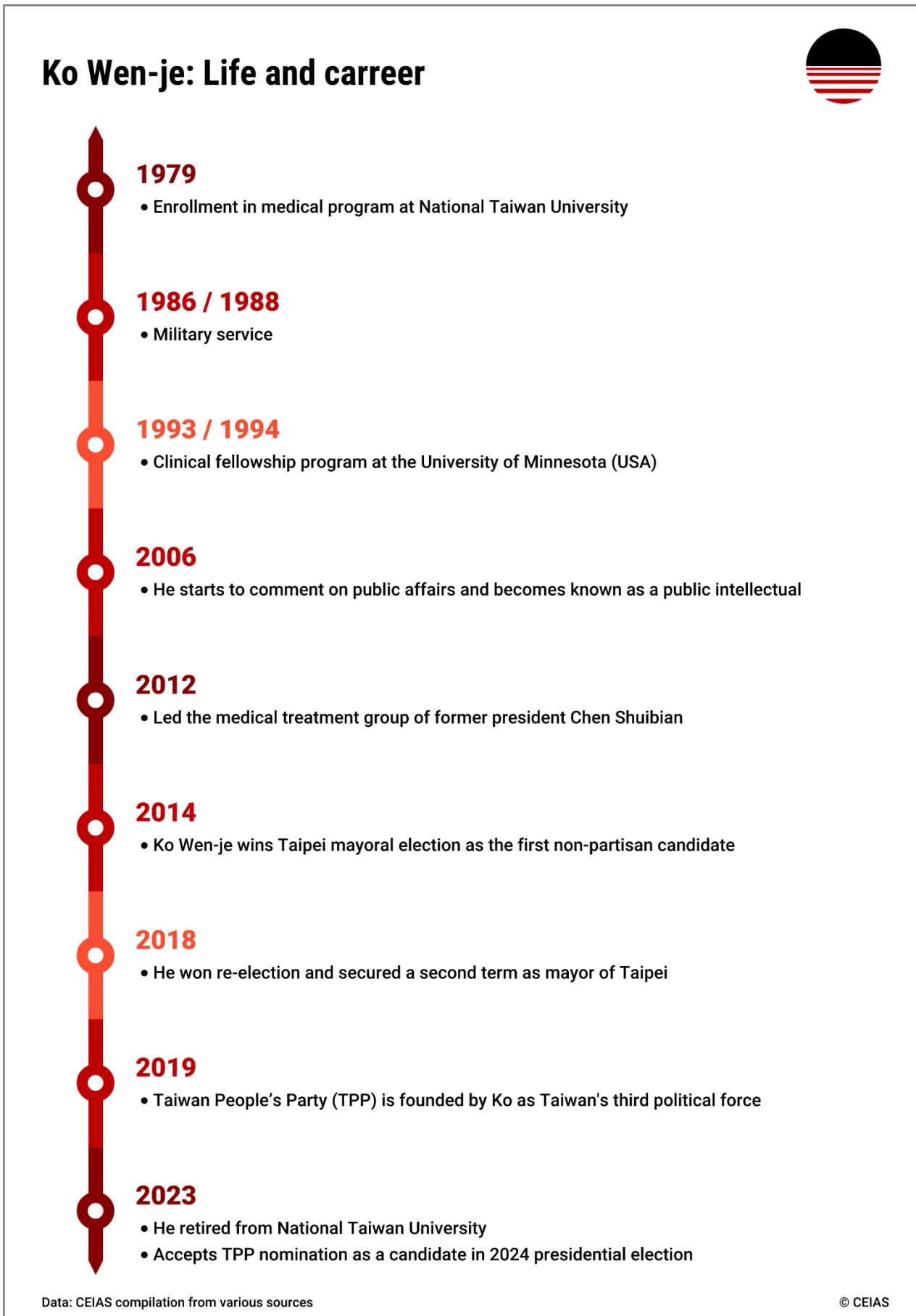
Over time Ko started gravitating more towards a China-friendly approach, which is widely associated with political parties representing the Blue camp spearheaded by the KMT. Stressing the necessity and benefits of cross-strait exchanges and dialogue, Ko established the Taipei-Shanghai City Forum, an annual gathering of government officials and civilians of the two cities. Nonetheless, Ko has never stopped criticizing Beijing for its behavior and actions in Hong Kong as well as for its retaliatory measures against Taiwan. Intimidation, he insists, exacerbates the Taiwanese people's hatred<sup>6</sup> of the Chinese government rather than fosters mutual dialogue and understanding.

Ko regrets the deep political divisions in Taiwan's society created by the two main political camps (the DPP and KMT) and blames them for creating stalemates because of their respective ideologies, instead of resolving important problems. Consequently, he founded the TPP in 2019 as a "third political force" grounded in the principles of pragmatism and professionalism, creeds that constitute the guiding values of his current electoral bid. Ko vows to evaluate policy proposals by their effectiveness and has mooted a coalition government that would appoint officials according to experience and expertise, not party affiliation. The proposal is, however, not without self-interest. Even if Ko wins the presidential election, he will probably face a Legislative Yuan, Taiwan's parliament, dominated by another party. Mindful of his party's limited mobilization capacities and the subsequent consequences for his governing capacities,<sup>7</sup> Ko pledges to collaborate with all parties in and even raised his intention to entrust the premiership<sup>8</sup> to the party with the most seats in the Legislative Yuan.

Ko is known for his blunt talking style in which he often draws on his medical experience to underscore his statements or viewpoints. In doing so, Ko strategically uses his professional career to construct his image as a pragmatic and professional politician. His unconventional communication style and anti-establishment critique—viewed by some as pure populism—has gained him popularity, especially among young people<sup>9</sup>. Turnout<sup>10</sup> rates of voters under the age of 40 used to be much lower than those of older voters, but youth electoral participation increased markedly in the 2020 presidential election, eventually helping Tsai Ing-wen vindicate her presidency. Aware of this potential, Ko strategically reaches out to this voter base by stressing issues of their concern (e.g. housing prices and low wages), building a strong social media presence, and adopting unconventional campaign styles. Among his most noteworthy fundraising events was a sold-out music show in Taipei, the KP Show<sup>11</sup>, where he himself sang several popular songs on stage.

Ko has been trailing Lai Ching-te in public opinion polls, having even intermittently led in June and early July. This came as a great surprise to many, although observers remain skeptical. Ko appears to have reached his saturation point at around 24% owing to two factors. From a demographic vantagepoint, voters over 45 have a larger impact and Ko lacks their support. Green voters of this age group support more Lai Ching-te and Blue voters are split; Ko must share them with the KMT candidate Hou Yu-ih and probably also Foxconn founder Terry Gou, who announced<sup>12</sup> to run as an independent candidate on 28th August.

Figure 1



## Cross-Strait relations

Ko Wen-je intends to create a distinct political image of his party, presenting the TPP as an alternative to the traditional parties that have so far dominated Taiwan's institutions. Although he largely avoids discussing issues of sovereignty, normatively he openly opposes Taiwan's independence and stresses the need to foster exchanges and dialogue with China to mitigate conflict and safeguard peace in the long run. However, in contrast to the KMT's rejection of independence which is entrenched with a historical claim of "one China" that includes the territory of the current People's Republic of China (PRC), Ko traces his rejection of independence to the obvious political constraints. The CCP will not forgo its claim on Taiwan in the foreseeable future and, thus, any attempt to declare independence could provoke a war. Moreover, with Taiwan's *de facto* autonomy lacks formal recognition internationally. According to Ko, although people in China and Taiwan share ethnicity and historical experience, and could become closer through economic integration, the two entities are, nevertheless, politically separate<sup>13</sup>. Moreover, given its failure in Hong Kong, the "one country, two systems" model is an unrealistic model for Taiwan.

Ko has long remained unclear about how he intends to achieve his goal of fixing cross-Strait relations. He used to draw on his track record of having successfully arranged the annual Taipei-Shanghai City Forums as mayor of Taipei and refer to his slogan of the "Five Dos of Mutuality", demanding both sides to mutually respect and understand each other and to acknowledge the other side's political and societal needs. Over the course of the election campaign, and with his campaign and research team diligently working backstage, more concrete visions have gradually come to the fore. For example, Ko envisions the resumption of the Strait Exchange Foundation (SEF) and the Association for Relations Across the Taiwan Straits (ARATS) as platforms for cooperation. Both organizations were founded on each side in the 1990s to manage multi-level exchanges between Taiwan and China but ceased to operate later on. Another of his visions is to seek collaboration in areas of common interest and global concern, such as climate change. Moreover, in spite of having previously joined the protests against the ratification of the CSSTA, Ko surprised the public with his proposal to revive the trade treaty,<sup>14</sup> albeit based on new conditions of transparency. After a public outcry from his support base, however, he walked back on the issue.



There are two prerequisites for the CCP to re-open official channels with the Taiwanese government. First, Taiwan makes clear it has no intention to seek formal independence. Second, it accepts the “1992 Consensus”, an agreement forged between the KMT and the CCP that says that there is only “one China” but each side has its own interpretation. In Taiwan, the formula is controversial as it represents a nationalism historically linked to the KMT that had grown out of a power struggle and civil war against the CCP in the early 20th century. Significantly, the CCP has never officially recognized the KMT’s version of diverging interpretations. Instead, in the international arena, the Chinese government insists on its “one China principle”, which contends that Taiwan is an inalienable part of China whose sole legitimate representative is the PRC and denies Taiwan the right to join international organizations.

The current CCP leadership’s official position is that President Tsai’s refusal to accept the “1992 Consensus” since she took office in 2016 is the reason behind the deterioration of cross-Strait relations and the legitimate rationale for its actions concerning Taiwan, including military drills and regular patrolling in Taiwan’s air and sea space. However, it is unclear whether Chinese authorities would have reversed their decision to halt high-level communication or acted differently if Tsai had altered her stance. Rather, it is widely accepted that the CCP disapproves<sup>15</sup> of a DPP government in principle. Ko has never endorsed the consensus, calling it a red rag that provokes disarray and conflict among Taiwanese people. Besides that, he has spoken about a lack of clarity on what the consensus actually means. In an interview<sup>16</sup>, provided during his trip to Japan, he stated that the CCP wants Taiwan to buy a product for which it does not know the content. Nonetheless, despite all this, he refers to the people on both sides of the Taiwan Strait as “one family”, as “nobody can deny that the people of Taiwan and China share a history, culture, language, and religion”<sup>17</sup>. With this rhetoric, Ko not only tries to fish more deeply in the Blue voter pool, but also to address Chinese leaders.

Ko first said that “the people across the Strait are one family” at the Taipei-Shanghai City Forum in 2015, consequently souring relations with the DPP that had supported his candidacy shortly before the 2014 Taipei mayoral election. After continuing to use this expression in the following years, Ko explained it as an “attitude”<sup>18</sup> through which the well-being of both societies could be enhanced and peace maintained, wishes that are allegedly shared by people on both sides. In his current presidential election campaign, Ko possibly hopes to escape the endorsement of the “1992 Consensus” and establish “one family” as a new consensus between Taipei and Beijing.

Despite evoking the idea of China as one cultural entity, Ko takes a clear position on defending Taiwan against China's aggression. On numerous occasions, he has stressed the importance<sup>19</sup> of democracy, freedom, and human rights as basic values for society as well as for preserving Taiwan's democracy. To achieve this, he plans to increase the defense capacities of the army and the people, preparing them for the worst-case scenario. Proposed measures include<sup>20</sup> emergency backup wells to maintain water supplies as well as capacity building for civilians. Ko also wants to substantiate relations with democratic allies, particularly in the Indo-Pacific, and promises to institute high-level defense talks<sup>21</sup> with Japan and the United States.

While Ko's rhetorical style and some of his positions have been a breath of fresh air in Taiwanese politics, gaining him popularity among many young voters, his proposals on cross-Strait relations are not entirely new. His concept of "one family" might please pan-Blue voters but it definitely alienates Green ones. Whether it can entice the PRC into negotiations and dialogue remains questionable, especially as former DPP President Chen Shui-bian proposed a possible "future one China"<sup>22</sup> in 2001 that was eventually rejected by Beijing. Despite extensive experience in subnational diplomacy (with some successful outcomes), Ko's main challenge remains to convince a majority of voters about his abilities to lead the country and manage cross-Strait and foreign relations. Indeed, he seems to face challenges on this front. According to a study by the Taiwan Public Opinion Foundation<sup>23</sup> published in July, Taiwanese voters are more confident in the foreign policy capabilities of the DPP candidate Lai Ching-te than those of Ko (and even Hou), whose experiences are confined to local politics.

## Taiwan-US relations

Ko, like many others with a similar educational background, is very familiar with the societal and political context of the United States. He received his medical training at the National University of Taiwan, where he stayed throughout his medical professional life. In his early career, though, he participated in a clinical fellowship program at the University of Minnesota and has since maintained professional collaborations with US colleagues. In his position as Taipei mayor, Ko visited the United States, meeting with scholars from prestigious universities and policymakers in Washington. He also had ample opportunities to engage with his US counterparts through sister-city agreements, as 12 of Taipei's 50 sister cities<sup>24</sup> are located in the United States. However, unlike the DPP and KMT, which maintain overseas

party branches and offices of international affairs in Washington engaging in regular lobbying and exchanges with US policymakers, Ko's TPP lacks such a structural foothold. His three-week visit in April 2023 was thus an important promotion opportunity for Ko to present his visions as a prospective presidential candidate to policy circles in Washington as well as to increase his party's visibility among the big Taiwanese diaspora in the United States. His visit sent a further signal, namely that Taiwan under a Ko presidency would stay committed to the US-Taiwan relationship. Ko has already scheduled another visit to the United States in November, although his travel will be limited to the country's high-tech industry base (Los Angeles and San Francisco).

While Ko has increasingly elaborated on his strategy for handling Taiwan's relationship with the PRC, he has remained vague about how to configure Taiwan's relations with the United States. He has emphasized that the United States is Taiwan's most important ally<sup>25</sup> on several occasions and reiterated this position during his visit in April. At an "fireside chat"<sup>26</sup> organized by the Washington-based think tank Center for Strategic and International Studies (CSIS), Ko cynically remarked that the United States had been the only country with courage to sell weapons to Taiwan. Yet, he simultaneously stressed the importance of remaining on good terms with the PRC and managing Taiwan's external relations flexibly. Ko noted that political relations were dynamic and could thus change, like US-China relations have changed over the past 30 years. He also noted that China, compared to today, might look differently in the future, thus alluding to discussions within some circles of Taiwanese society about what would happen if the regime on the mainland became democratic,<sup>27</sup> as well as doubts about the commitment and capacity of the United States to defend Taiwan in the event of a military aggression from the PRC. Such apprehensions have been nurtured not only by the PRC's relentless efforts to discredit the United States via its global propaganda, but also by numerous delays of the US arms sales in recent years<sup>28</sup>.

Ko's proposed framework for international relations thus envisions a more self-reliant Taiwan with enhanced defense capabilities at its core. While being mindful of the island nation's vulnerabilities, Ko wants Taiwan to adopt an open-ended foreign policy that does not prioritize one superpower over the other but weighs up its options and evaluates benefits. As such, his commitment to the United States is not unequivocal or unconditional as he does not exclude pivoting to the PRC on certain issues if deemed necessary. Washington welcomes Ko's intentions to stabilize relations with the PRC and his intentions to increase defense capacities, but is skeptical about his



ambiguity and ideas concerning a so-called “dynamic equilibrium” in the triangular relationship between the United States, China, and Taiwan.

## Taiwan and its neighbors

Ko has repeatedly criticized Taiwan’s two main parties for their cross-Strait positions. While he accuses the KMT of being too deferential to the CCP, he criticizes the DPP for provoking conflict and even war. In response<sup>29</sup> to a social media post by Lai on his presumed ambitions to “enter the White House”, Ko stated that it should be Taiwan’s ambition to be “recognized by the whole world”, not just by one country. Stressing national dignity, he said that Taiwan’s president should represent the interests of Taiwan and not further the goals of another country’s government. Accordingly, Ko aims for the substantiation of relations with democratic countries, particularly in the Indo-Pacific, such as Japan, Singapore, and some Southeast Asian states. Governments and political parties of these countries increasingly perceive the PRC as a threat to peace in the region and their own sovereignty issues, and so are pondering and recalibrating their own foreign policies. These developments have opened opportunities for Taiwan.

Indeed, discussions on relations with Japan, Taiwan’s historically closest partner in the region, took a central position in the pre-election debates. On several occasions, Ko has stated that Taiwan should follow Japan as a model for handling pressures caused by the great power competition. Significantly, he scheduled a four-day visit to Japan in June of this year, where he met with the country’s former prime minister Taro Aso, discussed triangular relations between Taiwan, Japan, and China, and spoke at a forum arranged by the Foreign Correspondents’ Club of Japan. Several weeks after that, Ko stated his plans to help institute trilateral high-level defense talks<sup>30</sup> with Japan and the United States.

Ko’s ambitions to further substantiate relations with Japan are to some extent personal, grounded in his admiration for and relationship with a former Taiwanese president, the late Lee Teng-hui, who promoted bilateral relations and a cultural identification with Japan during his tenure (1998-2000). In 2016, he pledged to strengthen relations<sup>31</sup> with Japanese cities, pointing to the negligence of this aspect by previous Taipei mayors. It is important to note that Ko has been capitalizing on the shifting momentum<sup>32</sup> in Japan’s foreign policy as well as the current (DPP-led) Taiwanese government’s groundwork<sup>33</sup> in strengthening bilateral ties. While Japan had previously been quite reluctant to say or do anything that might provoke retaliatory measures from Beijing, Japanese politicians have in recent years

become increasingly alarmed and outspoken about China's increasingly assertive actions in the South and East China Seas. Indeed, high-level politicians, including former Prime Ministers Taro Aso and the late Abe Shinzo, attracted several controversies with their statements<sup>34</sup> on this matter. Taro, for instance, argued for a joint intervention of Japan and the United States in the event of the PRC's military attack on Taiwan, while Abe declared that a Taiwanese emergency would be a Japanese emergency. Consequently, ties with Taiwan have improved and several conflict-related issues were shelved. In August, Taro visited Taiwan and met with President Tsai, marking the first visit<sup>35</sup> of a sitting vice president of Japan's dominant Liberal Democratic Party (LDP) since 1972, the year that Japan severed diplomatic relations with Taiwan.

When it comes to Taiwan's joining of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)<sup>36</sup>, of which Japan is a member, Ko has been bluntly pragmatic: Taiwan's (or rather the current government's) ambition to be accepted into the free trade block is hopeless due to the resistance from China, which isn't a member of the CPTPP but can nevertheless exert its influence on members to block Taiwan's inclusion.<sup>37</sup> Ko was stated to pin his hopes instead on Taiwan's participation in the Regional Comprehensive Economic Partnership (RCEP)<sup>38</sup> that requires only a majority consent. According to his own accounts on Twitter, he tried to lobby the United States for support<sup>39</sup> on this matter, as Taiwan's regional economic integration would bring peace to the region, which is in the US's interest. However, to the question of how he would convince China to agree to Taiwan's membership, Ko gave no details<sup>40</sup>.

Japan is not the only country Ko looks to for better relations. He regards Singapore as a model for solving a series of domestic issues and has traveled the city-state as a medical scientist and mayor of Taipei. He led a delegation to Singapore in December 2022<sup>41</sup>, during which he met officials from various ministries in an attempt to improve city-level relations and learn from Singapore's experience in language policies and digitalization. Whether such efforts will translate into more substantive bilateral relations and defense cooperation remains to be seen. Singapore-Taiwan relations have a complicated history and, similarly to Japan, Singapore has been carefully<sup>42</sup> treading its unofficial ties with Taipei over fears of angering Beijing and affecting its own economic opportunities. Singaporean Prime Minister Lee Hsien Loong made this painstakingly clear at the annual Boao Forum for Asia in March 2023,<sup>43</sup> where he stressed the need to "insulate economic relations"<sup>44</sup> from frictions in other bilateral issues. This address was undoubtedly directed to China.

As mayor, Ko was industrious in his efforts to advance subnational diplomacy with Taiwan's neighboring countries. But it remains to be seen whether Ko, as president, given his lack of experience in negotiating bilateral agreements and lobbying for Taiwan's regional and global integration, would be successful in scaling them up at a national level, especially because he remains unclear about what concrete steps would be required to achieve his more ambitious goals such as striking a deal for Taiwan to enter a free trade agreement.



# Hou Yu-ih

## Profile

Hou Yu-ih, formerly head of Taiwan's police force, has gained public recognition and popularity throughout his tenure as the mayor of New Taipei City that began in 2018. He was then re-elected for a second term in 2022. His political experience primarily lies in local and domestic affairs, lacking engagement in cross-Strait relations or diplomatic matters. Nonetheless, he emerged as the KMT's presidential candidate in May 2023.

Hou hails from a *benshengren* background, a reference to Taiwanese whose descendants came to Taiwan before the Chinese Civil War (1945-1949), and has reportedly been a KMT member for more than forty years. He received promotions under DPP-led governments, becoming the "youngest Director-General of the National Police Agency"<sup>45</sup> in 2005 under the then DPP President Chen Shui-bian. This adds to his non-conventional profile<sup>46</sup> within the KMT. Throughout his political career, Hou has generally refrained from engaging in contentious matters and has maintained a distance from controversial figures such as Han Kuo-yu, Kaohsiung's former mayor and former presidential candidate who lost to Tsai in the 2020 presidential election. Similarly to Ko Wen-je, Hou emphasizes pragmatism as the guiding principle of his political behavior, underscoring this attitude with the slogan: "Just do it, and do it well".

Hou was selected as the KMT's presidential candidate not only due to the party's tradition of choosing popular mayors<sup>47</sup> of important northern municipalities, but also because he was believed to have the potential to attract light-Green and non-partisan voters. Indeed, the KMT hopes that the former rising star in Taiwan's law enforcement and now popular mayor will have the broadest possible support to win back the presidential office. Fan Shi-ping<sup>48</sup>, a Taiwanese scholar from National Taiwan Normal University, therefore likened Hou to the KMT's version of President Tsai because of his consistently moderate approach.

However, Hou's background and avoidance of political mudslinging have led to much speculation about what he would do as president. Staunch KMT supporters fret that he might follow the same path as Lee Teng-hui, Taiwan's first *benshengren* president elected by popular vote, who is widely

perceived as a betrayer within the KMT and its supporters. Bonnie Glaser<sup>49</sup>, a noted Taiwan expert from the German Marshall Fund (GMF) of the United States, once suggested that the CCP may share similar apprehensions. More importantly, other observers note<sup>50</sup> that the choice of Hou as a KMT candidate sacrifices the support of deep-Blue voters and party members who are ideologically bound to the idea of “one China” and would thus like Taiwan to sustain strong social and economic ties to the PRC.

In fact, Hou’s preliminary nomination as the KMT’s presidential candidate in May faced considerable headwinds. Firstly, Hou was challenged by Terry Gou, founder of Foxconn, the world’s largest technology manufacturer and service provider, in an informal nomination race. Despite losing the unofficial primary, Gou continued to actively seek support from local party organizations and constituencies and eventually announced his intention to run as an independent candidate on 28th August.

Secondly, Hou is among the few scandal-free senior politicians, but his unblemished image was stained once he officially entered the presidential race. In May, the same month as his KMT nomination, accusations were made about kindergarten teachers drugging children in New Taipei City, and Hou’s protracted reaction in handling the matter dented his reputation as a competent leader.

Thirdly, Hou had (or rather still has) to overcome distrust within the KMT’s own ranks. His lack of international and diplomatic experience in his relatively short political career, combined with his emphasis on a practical “hands-on” approach, rather than an embrace of hard line ideological positions, has resulted in his initial inability to present robust arguments on cross-Strait issues. Some observers noted<sup>51</sup> his insufficient preparedness in May, when Eric Chu, chairman of the KMT, announced Hou as the party’s choice for the 8th democratic presidential elections. KMT politicians continue to express their dissatisfaction over Hou’s allegedly lacking dedication<sup>52</sup> to the election campaign. After his nomination in May, the Taiwanese media has indeed discussed whether Hou would be able to reconcile his obligations as acting mayor of New Taipei City with a busy campaign schedule.

Hou’s insufficient public visibility has been further exacerbated by a lack of a distinct profile. Hou acts as a restrained, loyal, and law-abiding public servant. Although internal security and crime fighting have been salient policy issues throughout his political career, he has been consistently less able to draw on his professional experience as a law enforcer and crime fighter to construct a distinct political image, especially compared to Ko

Wen-je (and Terry Gou who portrays himself as the prospective CEO of Taiwan). Several of Taiwan's noted political scientists<sup>53</sup> thus advised the KMT to come up with not only a "more eye-catching policy platform" but also a "better personal branding".

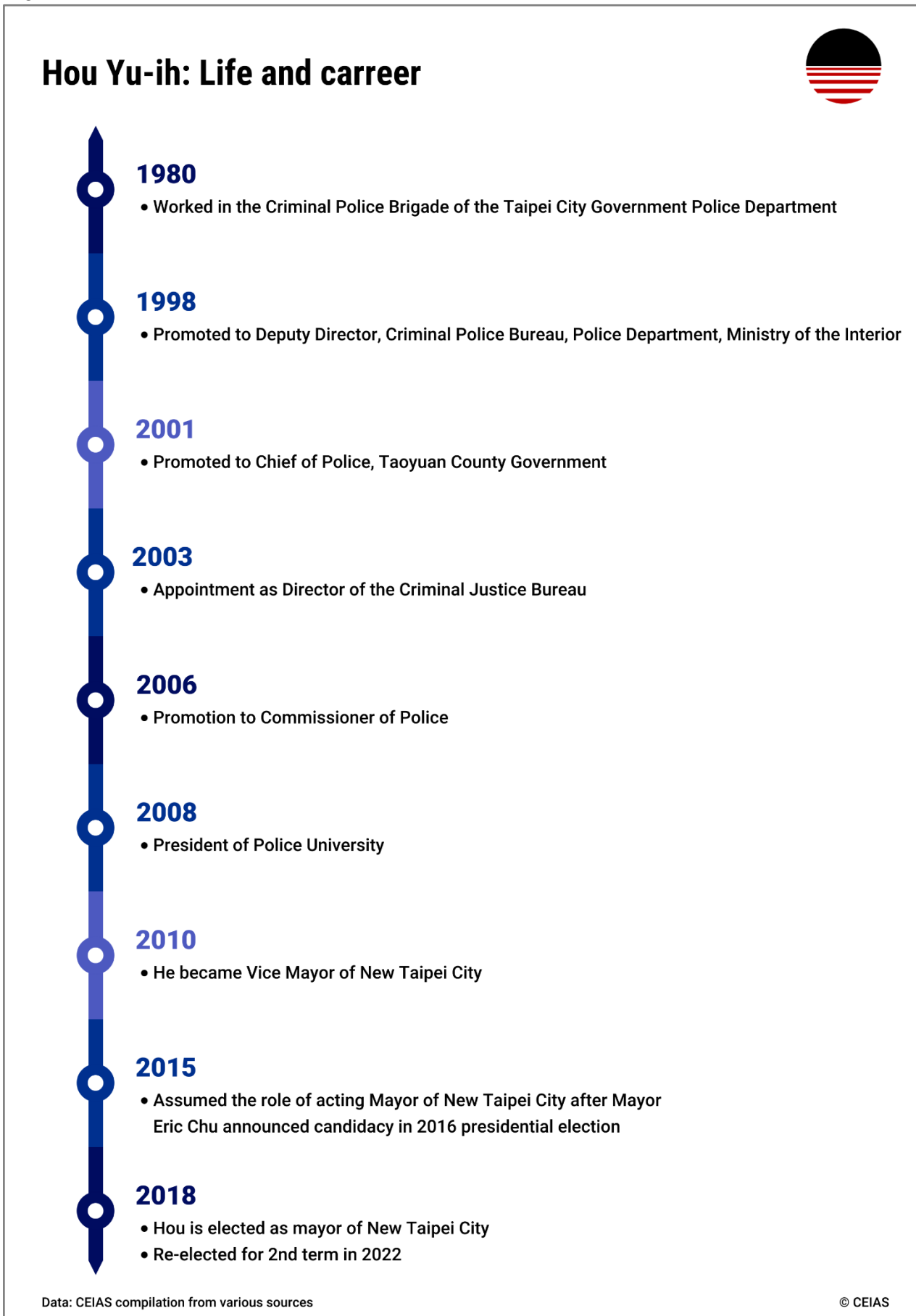
All these factors have contributed to a rough start and Hou's falling behind in approval rates. Hou has since received not more than 22% and trails Ko Wen-je who has persistently come second in public opinion polls, thus aggravating the widespread distrust in Hou among both KMT members and supporters. In response, KMT's chairman and Hou's patron Eric Chu has made efforts to close ranks and consolidate the party's position on Hou as its official candidate.

At the end of June, he invited King Pu-Tsung<sup>54</sup>, an experienced aide of former President Ma Ying-jeou, to assist with Hou's election campaign. Hou has subsequently begun to make bolder statements on significant policy issues, aligning himself more closely with the expectations of typical KMT supporters. Significantly, after several weeks of avoiding the issue, he finally expressed his support for the "1992 Consensus" and advocated for the resumption of the CSSTA, albeit only after Ko proposed the latter. Both stances were, nevertheless, interpreted as reactions to growing resentment within the KMT on the one hand, and Ko setting the tone in election campaigns directed at Blue voters on the other.

It further seems to be the case that Hou and his campaign team have started to take the branding issue seriously. Hou's visit to the United States drew broad domestic and international attention, with Hou stressing his merits as an experienced negotiator in life-and-death situations. In an interview<sup>55</sup> in New York he stated: "I have participated in countless gun battles and I always stood on the front line [...] Facing down opponents in a hostage situation teaches you that whether you're on the offensive or the defensive, you must also engage in dialogue and negotiations". It remains to be seen how Hou's branding and self-asserted appearance as the "negotiator of peace" will affect public opinion polls in the run-up to the elections.



Figure 2





## Cross-Strait relations

As a rather unconventional candidate for the KMT, Hou has demonstrated a measured approach when addressing sensitive political issues, sometimes deviating from a strict adherence to party ideology. Nonetheless, mounting tensions between the PRC and Taiwan have brought candidates' thoughts on cross-Strait relations to the forefront at a very early stage of the election campaigns, forcing Hou and his campaign team to take a position and craft policies ahead of time. Hou's struggle with this aspect of the campaigns reveals the challenges he faces in striking a balance between popular sentiments on one hand and accommodating different ideological strands and factions within the KMT, as well as creating his distinct image as a presidential candidate, on the other.

Mindful of his party's wish to stay on friendly terms with the Chinese leadership, Hou has previously approached sensitive issues very cautiously. Throughout his tenure as mayor of New Taipei City, he commented on political events related to the PRC only a few times, for example in the cases of the anti-extradition movement<sup>56</sup> in Hong Kong and the anniversaries of the Tiananmen Square massacre<sup>57</sup>. He has also previously refrained from expressing direct criticism of Hong Kong authorities or the CCP, nor has he publicly condemned police violence. Instead, he has persistently emphasized the values of democracy and the importance of dialogue between people and their governments. When running for the 2020 presidential elections, Han Kuo-yu had also adopted this approach, which eventually led to his defeat. Tsai and the DPP, on the other hand, won the 2020 elections due to their unequivocal stances and unwavering support for Hong Kong demonstrators. This time around, the KMT seems to have learned its lessons. Hou promises to defend Taiwan and its democratic system ("with his life"<sup>58</sup>) and opposes the "one country, two systems" formula. Nevertheless, he also advocates for an engagement-oriented approach to handling relations with the PRC, emphasizing dialogue and exchange to maintain peace, and criticizes the DPP government for doing the opposite. He thus portrays the upcoming elections as a "choice between peace and war".

From a political vantagepoint, Hou is in the spotlight of the KMT's struggle to readjust its ideological and foundational cornerstones and its China-friendly approach to better accommodate changing public sentiments. One way he attempts to do so is to incorporate a hue of Taiwanese nationalism into a new interpretation of the ROC constitution, and he does so in the context of current cross-Strait relations.<sup>59</sup> By repeatedly pledging loyalty to

the ROC constitution and rejecting Taiwan's independence, Hou reiterates official KMT ideology and its historical legitimation, and communicates his and his party's basic condition for engagement with the PRC to Beijing, which is the existence of the ROC and its *de facto* territorial sovereignty. In his op-ed for Foreign Affairs<sup>60</sup>, Hou insisted on the ROC being a sovereign state. At the same time, Hou avoids<sup>61</sup> discussing the controversial "one-China" idea that many voters equate with accepting the CCP's "one China principle", which regards Taiwan as an inalienable part of the PRC. Moreover, Hou adds a "nativist" perspective to the ROC nationalism. By using analogies—such as the "ROC is our nation, Taiwan is our home" or his "cup and water theory", in which the ROC represents the cup and Taiwan the water—he tries to illustrate the interdependency and inseparable bond between the two entities while simultaneously allowing Taiwan to have a distinct identity.

Similarly to his contenders, Hou dismisses<sup>62</sup> "one country, two systems", a model that was originally created by Beijing for Taiwan and was subsequently applied to Hong Kong in 1997 and Macao in 1999. Politically speaking, the rejection of this model bears comparatively low risks. There is now a broad consensus within the KMT that after what happened in Hong Kong and considering its widespread rejection in Taiwanese society, the "one country, two systems" framework has lost all credibility and feasibility. There is also a reason to believe that the CCP is crafting a new model for Taiwan's unification.<sup>63</sup>

The "1992 Consensus" is different, as it still enjoys broad approval by both the KMT members and supporters and is put forward by the Chinese government as the precondition for a resumption of high-level talks with Taiwan. Responding to criticism and requests to clarify his position, Hou eventually endorsed<sup>64</sup> the consensus in July. Moreover, accusing President Tsai of smear campaigns, Hou asserts that the "1992 Consensus" not only conforms with the ROC constitution, but that it also lays the foundation for peaceful development in the Taiwan Strait. This makes Hou the only official presidential candidate to support the "1992 Consensus" (Terry Gou, too, supports the consensus but his candidacy depends on his ability to gain enough signatures before November). Significantly, Hou further asserts to be the only candidate who has the ability to resume high-level dialogue with China.

Similarly to Ko Wen-je, Hou remains quite vague<sup>65</sup> about how he intends to implement his cross-strait approach, though he unveiled a more detailed picture of his strategies in September during his visit to the United States. Moreover, while Hou has no experience in national politics or international

and diplomatic affairs, he can draw on established communication channels between the KMT and the CCP that reach the party-state's highest echelons. Significantly, by receiving vice chairman Andrew Hsia and former President Ma Ying-jeou, the CCP leadership has already demonstrated its readiness<sup>66</sup> to enter into a dialogue with Taiwanese politicians and unequivocally signaled which party it prefers to do business with. However, it remains to be seen to what extent Taiwanese voters value these connections and how they evaluate the liabilities that come with them.

With respect to defense policy, Hou faces a dilemma. One might think that the former head of Taiwan's law enforcement agency would have chosen this issue to become his signature policy, but not only is the issue dominated by the DPP, it is also a thorny one. As defense policy is tied to cross-Strait relations and involves enhancing military capacities to deter China, its goals run against the KMT's policy of promoting more engagement with China. However, with the current (DPP-led) government having enacted historic military reforms that, among other things, increased the defense budget by 15%, as well as amid the Russian invasion of Ukraine, Hou (and the KMT) cannot afford to not have a credible defense strategy, especially given its centrality in the current election campaigns.

Hou opposes various aspects of the current government's defense policy, including the extension of the conscription period and overreliance on the United States. He garnered widespread attention when he dismissed the DPP's proposed "3+1 plan", which grants university conscripts the option of completing their academic studies for three years before fulfilling one year of military service. Hou's desire to reverse the current government's extension of military service from four to twelve months has raised concerns in the White House, prompting communication from several US officials who expressed their apprehension. Hou subsequently modified his stance, highlighting that the conscription period would be reduced to four months only during times of peace. Hou's reversal of his stance was also likely related to the Taiwanese public's reaction. The DPP's push to extend conscription enjoys broad public support<sup>67</sup> and Hou's remarks sparked criticism.

While Hou, similarly to his contenders, emphasizes his commitment to bolstering and enhancing Taiwan's national defense capabilities (including by sustaining military procurement efforts), he also regards dialogue with Beijing (similarly to Ko Wen-je) as key to conflict resolution and preventing the PRC from military adventurism. Hou officially confirmed his stances on cross-Strait relations and defense policy, including what has been dubbed as Hou's plan to avert war with China, in an article published by Foreign

Affairs<sup>68</sup> midway through his September trip to the US. In addition to confirming his acceptance of the “1992 Consensus” and opposing the “one country, two systems” formula, Hou proposed a “three Ds” strategy for maintaining stability in the Taiwan Straits and the broader Indo-Pacific region based on deterrence, dialogue, and de-escalation. To avert the use of force by China, Hou’s plan emphasizes strengthening Taiwan’s asymmetric capabilities and expanding cooperation with like-minded partners and allies (the article predominantly focuses on the United States but also mentions Japan, South Korea, and target countries of the New Southbound Policy).<sup>69</sup> In the op-ed Hou reiterates his stance on the importance of and his endeavor to foster Taiwan’s participation in regionalist projects and international organizations such as the CPTPP, the World Health Organization (WHO), the International Civil Aviation Organization (ICAO), and Interpol. It is therefore the article’s emphasis on supplementing the aforementioned deterrence initiatives with cross-Strait dialogue and exchanges, as a way of de-escalating the cross-Strait tensions, that sets Hou apart from his contenders, and should be paid particular attention.<sup>70</sup>

## Taiwan-US relations

Although Hou has not extensively commented on Taiwan-US relations, he has been careful not to portray himself as an anti-US candidate. He has consistently maintained a friendly attitude and has expressed his readiness and commitment to uphold and strengthen the crucial partnership. This is in line with the stance of his patron, current KMT Chairman Eric Chu, who has been trying hard to overcome the party’s anti-American reputation. One notable measure<sup>71</sup> in this regard was the re-opening of the KMT’s liaison office in Washington in 2022 that had been closed down in 2008 during the tenure of then President Ma Ying-jeou, who preferred substantiating political and economic ties with the PRC.

In June 2023, the chair of the American Institute in Taiwan, Laura Rosenberger, met Hou during her visit to Taiwan. Similarly to the other two presidential candidates, Hou was invited to the 4th July Independence Day celebration<sup>72</sup> in Taipei. More significantly, he was accompanied by KMT members such as former party chairman Johnny Chiang, who is known for his insights into international affairs and connections to policy circles in Washington.

Hou’s September visit to the United States<sup>73</sup> followed those of his contenders, with Ko Wen-je traveling in April and Lai Ching-te in August. He

delivered several public speeches and held closed-door meetings with both politicians and academics, including meetings with members of the US Senate and Congress, and visits to several think tanks. In addition to Johnny Chiang, Hou was accompanied by Alexander Huang, who used to work at CSIS and is known for his connections in the United States, as well as vice chairman Andrew Hsia. Hsia's presence is significant. He represents the deep-Blue faction within the KMT and has met the head of the Taiwan Affairs Office of the Chinese Communist Party, Song Tao, twice in February and August) before embarking on the trip to the United States. Hou's entourage thus reveals the complexity of Hou's prospective US policy. One might argue that dispatching vice chairman Hsia, instead of chairman Eric Chu, meant to send a message of unity. But more probable is that Hsia insisted on joining Hou, as his presence allowed him to extend control over protocol, keeping overly pro-US promises at bay while stressing the KMT's stance that sees China as an important partner. Moreover, Hsia's participation in combination with his visit to China in August might also be the reason behind the PRC's fairly restrained reaction to Hou's visit to the United States.

## Taiwan and its neighbors

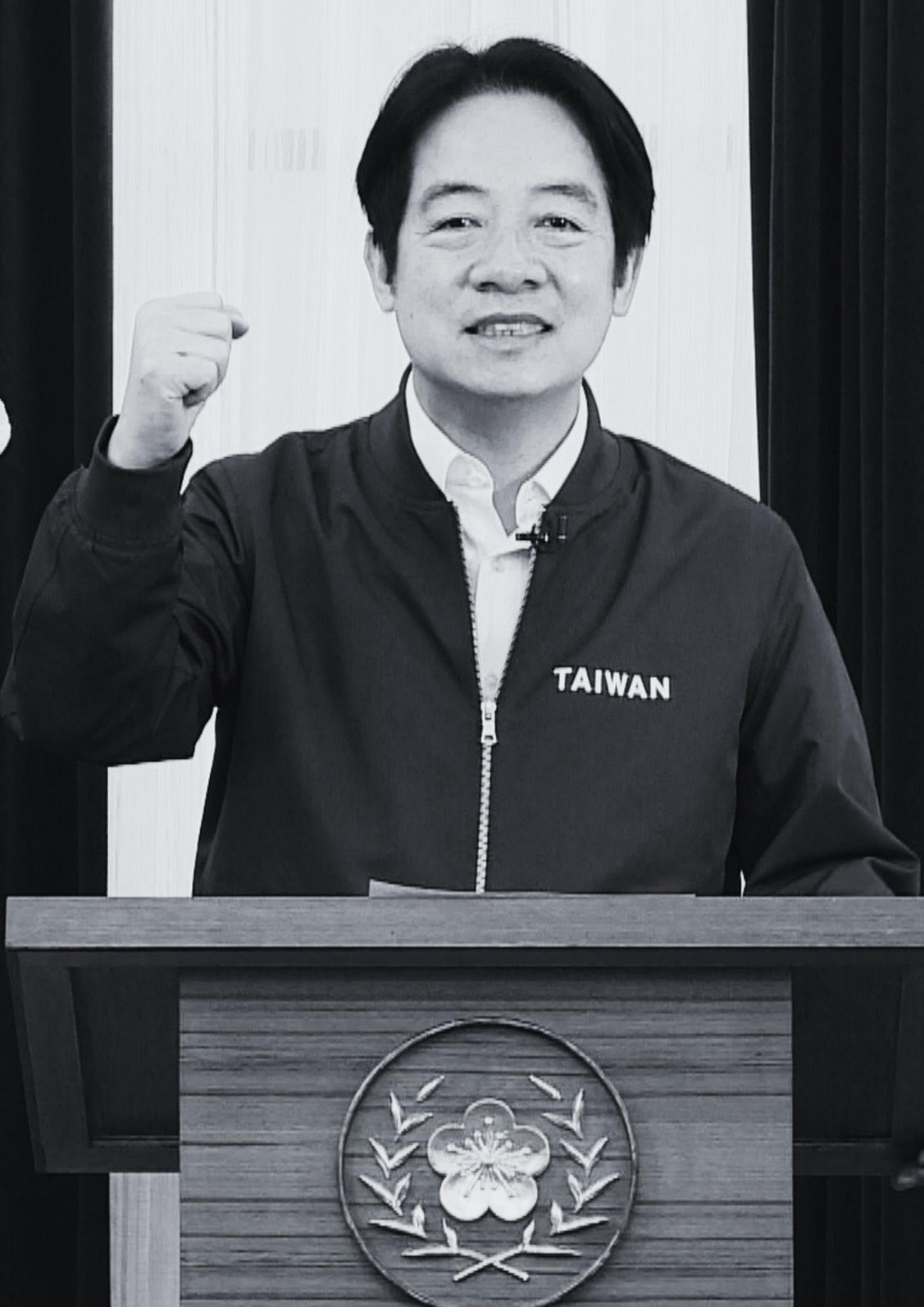
As with Ko Wen-je, Hou's engagement with other countries in East and Southeast Asia is limited to city-to-city exchanges and subnational diplomacy. In general, he has not extensively discussed Taiwan's relations with other countries. However, like Ko, he initiated a diplomatic mission to Japan<sup>74</sup> in early August during which he met 36 parliamentary members with various party affiliations. Hou also held discussions with Taro Aso, the former prime minister and the current vice president of the ruling LDP. Furthermore, his itinerary included a meeting with Koichi Hagiuda, an influential figure within the LDP, who is believed to be a potential candidate for the Japanese premiership.

Hou's visit to Japan was remarkable as it was his first visit to a foreign country after his official nomination, and the second visit to Japan<sup>75</sup> of a KMT presidential candidate (with the first undertaken by Ma in 2007). Conspicuously, he branded his trip as a "friendship journey", probably an intentional allusion to President Tsai's official "Taiwan-Japan friendship visit" in 2015 when she was running as a presidential candidate. Hou and the KMT's intention was to underscore that Taiwan under a KMT president would, like the current DPP government, continue and further substantiate its traditionally strong ties with Japan, something that former President Ma

Ying-jeou also promised but eventually not delivered. Hou's promises are thus likely to get overshadowed by Taiwan-Japan relations between 2008-2016. Although the relations remained positive throughout Ma Ying-jeou's presidency, Ma did not follow up on his campaign promises. Not only did he favor substantiating relations with the PRC over those with the United States and Japan, but he also "played up Taiwanese resistance to Japanese occupation of Taiwan"<sup>76</sup> and reasserted Taiwan's claim to the Senkaku/Diaoyu islands, a claim that the late President Lee Teng-hui had stepped back from in the 1990s. Taiwan and Japan began upgrading bilateral relations again only when President Tsai took office in 2016.

During his visit to Japan, Hou made reassurances and spoke boldly about his readiness to protect Taiwan with his life<sup>77</sup> in the event of a war. Yet, the obvious problems prevail. In contrast to Ko Wen-je and Tsai Ing-wen, whose understanding and commitment to close ties with Japan are influenced by their personal relationships with former President Lee Teng-hui, Hou's stance on Japan is mostly driven by the ideas of the KMT's moderate faction. Moreover, Hou and the KMT chairman Eric Chu are unable to dictate the party's policy on their own, as they have to accommodate the stances of Ma Ying-jeou and other old guards that prefer close ties to the PRC and high-ranking CCP cadres. This internal party dynamic complicates KMT's position on Taiwan's relations with Japan as well as Japan's considerations of how to approach China in the event of a KMT victory in the elections. Needless to say that the same applies to Taiwan-US relations.





# Lai Ching-te

## Profile

Lai Ching-te has been dubbed the continuity candidate. A physician by trade, he started his political career as a representative in the Legislative Yuan, a position that he retained for four consecutive terms (from 1998 to 2010). He then rose to prominence as a popular mayor of Tainan, a long-established stronghold of the DPP. Re-elected in 2014, his second mayoral term came to an end when he made the switch to national-level politics, joining President Tsai's administration, first as premier in 2017 and then as vice president in 2020. When Lai resigned as premier in 2019, he claimed to have done so in response to the DPP's poor electoral showing in the 2018 local elections, although several observers interpreted it as a foreshadowing of his later challenge<sup>78</sup> to Tsai. Indeed, Lai ran against Tsai in the DPP's 2019 presidential primary. In spite of losing to her, he subsequently joined Tsai's 2020 presidential ticket as her vice president.

Following Tsai's resignation as the DPP chairwoman in November 2022, a way of her taking responsibility for her party's poor performance in that year's local elections,<sup>79</sup> Lai was elected chairman of the DPP in January 2023. With the chairmanship traditionally linked to the party's presidential candidacy, Lai became the DPP's presidential candidate three months later, running unopposed<sup>80</sup> in the party's primary. Yet, this does not mean intra-party opposition to his nomination ceased to exist.

Lai's unsuccessful challenge in 2019 was his sole electoral defeat, which further enhances his profile as a successful candidate with both legislative and executive (including diplomatic) experience. Tsai officially endorsed Lai's candidacy in July 2023, demonstrating the party's unity (at least, as far as outward appearance is concerned). This stands in stark contrast to the KMT, whose chairman Eric Chu has been unable to control open factional infighting. Nonetheless, there is well-known animosity between Lai and Tsai, with both representing different factions and generations of the DPP, an important aspect to follow both in the concurrently held legislative election as well as post-electoral negotiations about the intra-party distribution of power. Lai's connections are with the more independence-leaning "New Tide" faction and he appeals to deep-Green voters, which is



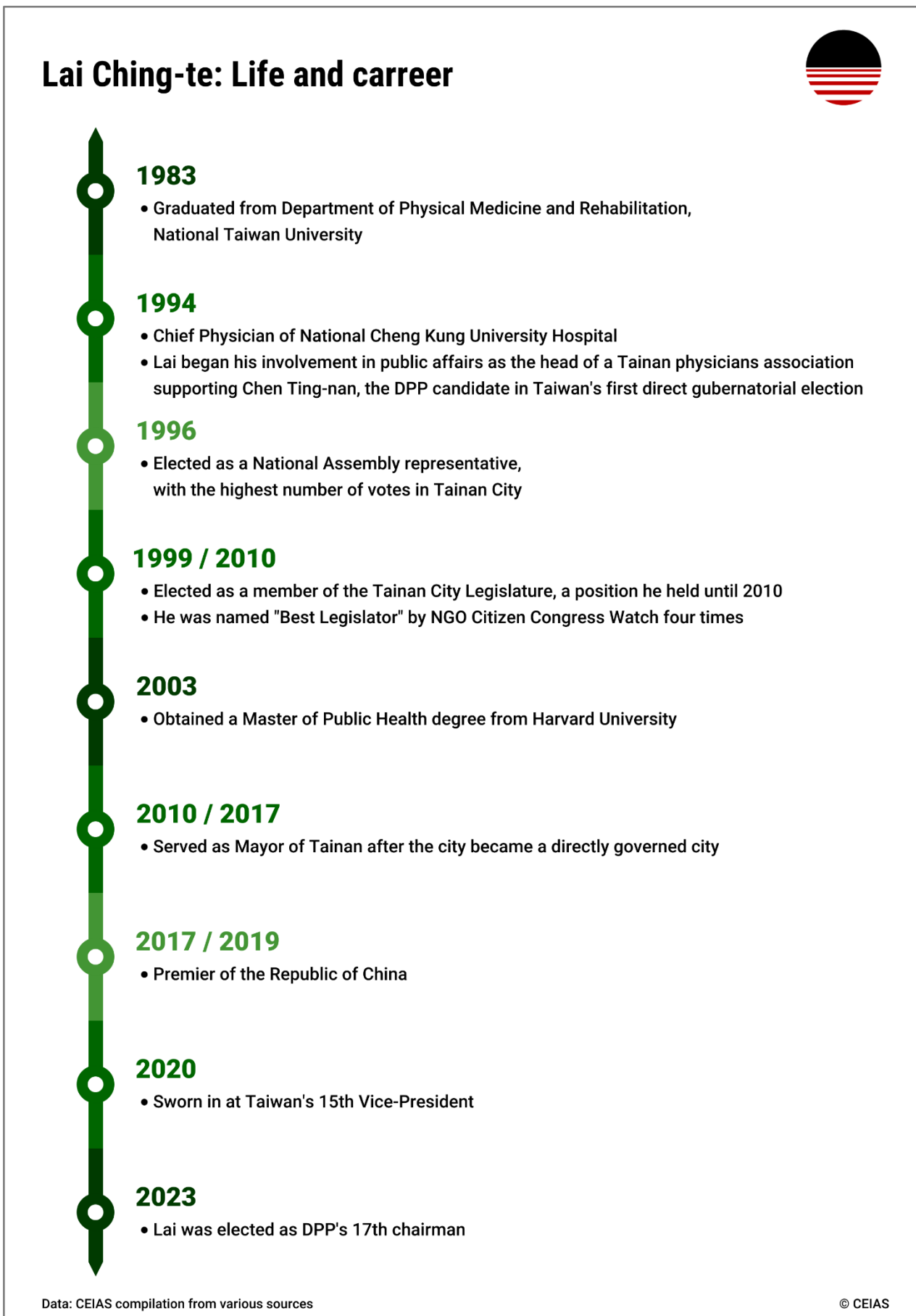
likely to complicate his political image as a moderate, status quo candidate who wants to build upon Tsai's foreign policy initiatives.

At the time of writing, Lai is still in the lead in most public opinion surveys<sup>81</sup>, supported by 42.52% of the respondents (Ko is on 24.33% and Hou on 22.25%). His level of support also seems to be the most stable among the three candidates; polls by Taiwanese Public Opinion Foundation found only slight fluctuations over the last three months. His support is mainly concentrated among voters over the age of 45 and with less formal education; younger and higher educated voters continue to express a preference for Ko. Lai's voter base thus signifies a generational divide<sup>82</sup> that roughly corresponds to similar divides among the DPP's factions and members when it comes to their preference for Lai over Tsai. The pollsters further observed<sup>83</sup> that while a clear majority of the DPP voters support their party's presidential candidate, this is not the case for the KMT voters, indicating a pan-Blue split (with Ko more appealing to swing and light-Blue voters) that is likely to benefit the pan-Green camp. The split is further exacerbated by Terry Gou's potential joining of the presidential race.

It is also important to note that Lai's levels of support vary greatly depending on the issue in question, with support for his cross-Strait stance<sup>84</sup> bringing Lai closest to the other two official candidates. This is in part due to a lack of significant difference between the candidates on the issue, especially considering repeated appeals to pragmatism by all three. All in all, whether Lai will become "Tsai 2.0", as some observers seem to believe, remains to be seen, but he certainly has a long road ahead of him to persuade Taiwanese voters as well as the island's democratic allies of his convictions on the major foreign policy issues.

Lai's history, especially his links to and support from deep-Green DPP members and voters, and some of his recent comments about cross-Strait and US-Taiwan relations, will continue raising doubts (especially within the United States) about whether he actually is a status quo candidate. Domestically, on the other hand, Lai's moderation, including his statements that have been dubbed by some as light-Blue, have been intended to appease the United States and other allies, are likely to be perceived negatively by the deep-Green segments of his voter base.

Figure 3



## Cross-Strait relations

Lai has a principled approach toward the question of Taiwan's sovereignty. In his legislative and local roles, he has established himself as a pro-independence politician, frequently criticizing Taiwan's economic dependency on Beijing and advocating for stronger ties, both political and economic, with not only Washington but also South and Southeast Asian countries that are the focus of Tsai's signature New Southbound Policy (NSP).<sup>85</sup> Although Lai's stance has become more moderate since entering national politics, a shift that is representative of many DPP politicians who have moved up from local to the national level, several of Taiwan's unofficial allies, in particular the United States, express concerns about Lai's history of pro-independence statements and his deep-Green support. Some have even compared him to former President Chen Shui-bian<sup>86</sup> (2000-2008), whose administration oversaw one of the tensest periods in cross-Strait relations.

Nonetheless, Lai's centrist position prevails in the statements he has made since becoming premier and subsequently vice president. Even his self-depiction as a "pragmatic worker for Taiwan's independence"<sup>87</sup> aligns with Tsai's status quo-oriented approach. The wording, particularly the adjective "pragmatic" that Lai added to his original statement during his premiership, is intended to indicate the shift (whether rhetorical or substantive) in Lai's stance on cross-Strait relations. His moderation is further underscored by the replacement<sup>88</sup> of his slogan "resist China, protect Taiwan" by "peaceful protection of Taiwan". This rhetorical switch was made following the DPP's defeat in the 2022 local elections when the party (unsuccessfully) utilized the former slogan in an attempt to mobilize voters with their cross-Strait policy rather than focus on domestic issues.<sup>89</sup>

Pragmatism plays a particularly important role in Lai's approach towards independence (and cross-Strait relations more generally) as it forms one of the "three tenets"<sup>90</sup> he introduced in 2018. The first tenet is represented by Lai's frequently cited statement<sup>91</sup> that "Taiwan is already an independent country, and there is thus no need to declare independence". Interpreted as an attempt to blur the distinction<sup>92</sup> between *de facto* and *de jure* independence, this statement is indicative of Lai's understanding of independence, which is in line with Tsai's own support for the status quo, especially as she herself uses different variations of this statement. The second tenet emphasizes the Taiwanese people's self-determination: any decisions about Taiwan's future, including potential changes to the status quo, are vested solely in the hands of the Taiwanese public. This claim

should be understood in terms of Lai's endorsement of Tsai's "four commitments"<sup>93</sup> (democracy, autonomy, sovereignty, and self-determination) and his attempt to counter KMT's criticism of his pro-Washington orientation. Finally, the third tenet emphasizes Lai's practical and pragmatic approach to cross-Strait relations. These tenets, however, seem to add little to Tsai's own cross-Strait position, especially the notion of pragmatism that has been used interchangeably with the idea of independence, both of which aim to highlight Lai's support for the cross-Strait status quo, a position taken by all three presidential candidates, albeit interpreted differently and emphasized to varying degrees.

Similarly to Tsai, and following the DPP's official position on the matter, Lai rejects the "1992 Consensus", which he frequently equates to accepting Beijing's "one-China principle". Whilst putatively respecting the decisions of corporate actors, as seen in his 4th July op-ed<sup>94</sup> for the Wall Street Journal in which he defines his stance on cross-Strait relations as open to "dialogue without preconditions, based on the principles of reciprocity and dignity", Lai does not intend to actively seek dialogue or more substantive exchanges with China. This sets him apart from his presidential rivals. In April 2023, whilst attending the funeral of pro-independence activist Koo Kwang-ming, Lai called for Taiwan and China to forge relations based on Koo's idea of "federation of brothers"<sup>95</sup>, with Taiwan's (ROC/*de facto*) independence being a precondition for such an affinity-based relationship.

This principled position towards China has been countered by accusations<sup>96</sup> from his political opponents that the DPP and Lai are actively pushing Taiwan to the brink of war. The KMT and Hou have underscored this by framing the election as a choice between war and peace. Lai, on the other hand, has been trying to counter the accusation with a campaign slogan stating that the DPP stands for "democracy, peace, and prosperity"<sup>97</sup>. He has also not missed the opportunity to accuse his rivals of siding with the wrong ally. The elections, as asserted by a respective DPP slogan, will be a choice between democracy and autocracy<sup>98</sup>, a dichotomy that was also used by the DPP during the 2020 election campaigns. Moreover, Lai has further emphasized the importance of preserving Taiwan's democracy while talking about "democratic unity", "democratic governance" and "democratic peace" during his acceptance speech<sup>99</sup> as the DPP's presidential nominee. All of this indicates alignment (at least at a rhetorical level) of Lai's stance with that of Tsai, the United States, and the DPP's image of itself as the party responsible for preserving Taiwan's democracy.

Besides Lai's early statements, which were widely seen as indicative of his deep-Green support for independence, there is another subset of controversial statements made by Lai. Most noteworthy among these was his 2017 statement that the Taiwanese should be "close to China whilst loving Taiwan"<sup>100</sup> as well as his current "anti-CCP, not anti-China"<sup>101</sup> slogan. Although some observers consider these to be an indication of a reversal of Lai's stance on independence, going as far as comparing<sup>102</sup> this seeming U-turn to that made by Ko, Lai has responded by clarifying that his cross-Strait position remains unchanged. Indeed, these statements were employed predominantly as a way of differentiating Lai's own position from that of Tsai, with the 2017 statement being Lai's (unsuccessful) attempt to create a new model<sup>103</sup> for his party's cross-Strait policy prior to his 2020 presidential election bid. These statements should, therefore, be understood within the context of ongoing politicking within the DPP, not as a U-turn by Lai towards pan-Blue sentiments. They, in fact, further highlight Lai's centrist position. If elected, his presidency would follow Tsai's cross-Strait policy: it may not actively seek a deeper engagement with China, yet it is also unlikely to seek any further deterioration of the cross-Strait status quo.

Nonetheless, considering its well-documented stance on the DPP, Beijing is unlikely to accept Lai as Taiwan's next president, regardless of his rhetoric or actions, and its increased military presence in the Strait (as well as the South and East China Seas) will continue. In light of this, as well as China's increasingly menacing tone toward Taiwan, Lai (similarly to his contenders) has made the protection of Taiwan's autonomy and democracy as well as regional peace more broadly the central political goal of his presidential bid. However, while the other two candidates seek peace primarily through increased dialogue and exchanges with the PRC, Lai regards deterrence<sup>104</sup>, in terms of building Taiwan's defense capacities and strengthening ties with like-minded allies, as pivotal to his strategy. He has committed himself to Tsai's national defense policies that entail an increase of Taiwan's defense budget by 15% from 2022 to 2023 and an extension of compulsory military service from four months to one year for male citizens aged 18 and above, as well as envision the modernization of military training, reorganization of the defense corps, and reform of the reserve system<sup>105</sup> (the latter through bureaucratic reorganization and an increased and better training for reservists, including the promotion of their social value). If elected, Lai promises to "expedite"<sup>106</sup> this transition and seek international cooperation by enhancing training, restructuring civil defense, and information sharing. The United States and Japan, Taiwan's most important allies, play a pivotal role in this plan.

## Taiwan-US relations

Not only does Lai hold a Master's degree from Harvard School of Public Health, he has also visited Washington several times and hosted visiting American dignitaries from all walks of life, including politics, business, and civil society. In Lai's opinion, the United States is the key ally for protecting Taiwan. Similarly to Tsai, he has emphasized people-to-people relations, frequently praising the record number<sup>107</sup> of visits by US lawmakers as well as representatives of NGOs and think tanks that took place during Tsai's time in office. Lai has also been outspoken about his support for closer US-Taiwanese cooperation, especially in the economic realm, acclaiming existing initiatives such as the Global Cooperation and Training Framework<sup>108</sup> and the US-Taiwan Initiative on 21st Century Trade.<sup>109</sup> Indeed, economic diplomacy seems to be prioritized by Lai when it comes to the future development of US-Taiwanese relations. Taiwan's desire to join the CPTPP and sign the US-Taiwan Bilateral Trade Agreement were among his regular talking points, most recently during his April 2023 meeting with the current chairperson of the American Institute in Taiwan, Laura Rosenberger<sup>110</sup>, as well as a subsequent meeting the following month with former US national security advisor John Bolton<sup>111</sup>.

At the same time, Lai's mostly positive diplomatic record is challenged by his previous statements, with Washington continuing to express its concerns<sup>112</sup> about what they see as Lai's deep-Green inclinations. Lai's controversial statements, such as his calls for the United States to abandon strategic ambiguity or his more recent questioning of Taiwanese presidents' inability to visit the White House<sup>113</sup>, have escalated skepticism<sup>114</sup> in the United States about his proclaimed intention to maintain the status quo should he be elected. However, it is also important to note that many of the US concerns regarding Lai seem to stem from Washington's lack of understanding of the DPP's political discourse around independence, which has been reinforced by Western media that continues to depict the DPP as an explicitly pro-independence party (regardless of the person in power).

Considering its publication date, Lai's Wall Street Journal op-ed from early July is widely seen as his most recent attempt to reassure Washington as well as Taiwan's other allies of his status quo orientation.<sup>115</sup> In the op-ed, Lai defines four pillars of his so-called "plan for peace". First, expanding Taiwan's deterrence by focusing on asymmetric warfare, civil defense, and cooperation with allies. Second, safeguarding Taiwan's position as a secure link in the global supply chains by encouraging trade diversification and

supply chain securitization. Third, forming new, and strengthening old, democratic partnerships. And fourth, promoting steady and principled cross-Strait leadership based on pragmatism and consistency, all of which adhere not only to Tsai's ongoing efforts but also to Washington's own global initiatives and preferred options for Taiwan's future foreign policy developments.

Unsurprisingly, the op-ed was not received well in Beijing. The spokesperson of the PRC embassy in Washington, Liu Pengyu<sup>116</sup>, equated Lai's support for the status quo with that of "peaceful separation", his four-pillar plan for peace with efforts to "sell out Taiwan to the US", and his claim to "never rule out the possibility of dialogue without preconditions" with "an old camouflage to deny the One China Principle". Beijing has issued warnings against Lai's planned stopover<sup>117</sup> in the United States on his way to and from the inauguration of Paraguay's president-elect Santiago Pena, a trip that he embarked on 12th August. Despite keeping his visit as low key as possible, Beijing retaliated with renewed and strengthened military presence and drills<sup>118</sup>, as well as an import ban<sup>119</sup> on mangos.

## Taiwan and its other neighbors

Lai's focus on economic diplomacy should be understood in terms of the DPP's focus on promoting peace and stability in the Indo-Pacific by strengthening relations with Taiwan's neighbors: traditional allies, such as Japan, and Southeast and South Asian nations that have been a focus of Tsai's NSP. Trade and, to a lesser extent, investment play a major role in all of these.

In his legislative and executive roles, Lai has either led or been part of delegations to 22 countries, including Japan, South Korea, and several EU member states, through which he has gained substantial diplomatic experience. As a former lawmaker, Lai has experience in lobbying for Taiwan's membership in the WHO. But it is his strong personal ties<sup>120</sup> to Japan's ruling LDP and personal involvement in demounting obstacles in bilateral ties that could be of great value to further strengthening of Taiwan's relations with its major East Asian ally, as well as helping Taiwan's efforts to join the CPTPP. In contrast to Ko Wen-je, who discards Taiwan's membership in this regionalist trade agreement as unrealistic, Lai remains faithful to this ambition. His message is clear: politics does entail a grain of idealism, high ambitions, and politicians must strive to overcome obstacles rather than just look for feasible alternatives.



Lai's ties to Japan date back to his tenure as a mayor of Tainan, when he initiated an aid program to help the victims of the 2011 Tohoku earthquake. After this, he focused on developing sister-city relations between Tainan and several Japanese cities. In July 2022, he attended the funeral<sup>121</sup> of the former Japanese Prime Minister Shinzo Abe, becoming the highest-level Taiwanese official to visit Japan since 1972, when Tokyo severed its diplomatic relations with Taipei. Besides his focus on economic diplomacy in Taiwan-Japan relations, in March 2023 Lai proposed establishing a defense dialogue mechanism<sup>122</sup> that would promote closer security cooperation.

Lai is also supportive of continuing Tsai's NSP initiatives<sup>123</sup> for strengthening trade and investment ties as well as people-to-people exchanges in education, tourism, public health, and agricultural cooperation. Particularly noteworthy is his push for the opening of support bases across Southeast Asia<sup>124</sup> in order to reach the Taiwanese diaspora living there, a community that has grown significantly since the NSP's launch. This contrasts with the Taiwanese living and working in China, who traditionally support the KMT (or at least are believed to do so). Lai has lauded the NSP for opening up additional ground—on the basis of its complementarity with Abe's calls for expanded trade ties with Southeast and South Asia—for further cooperation with Japan<sup>125</sup>.

Furthermore, Lai has frequently emphasized the importance of strengthening Taiwan's role<sup>126</sup> in both formal and informal regional initiatives, such as the CPTPP, the Asia-Pacific Economic Cooperation forum and even the Yushan Forum<sup>127</sup>. This can again be interpreted as his focus on economic security, using trade diversification to counter dependency on China, and thus to prevent future attempts of economic coercion by Beijing. This is in line with Tsai's own efforts and the DPP's official position.

Lai's advocacy for Taiwan's WHO membership during his tenure as a Legislative Yuan lawmaker and his strong personal ties to Japan could become major assets for Taiwan's foreign policy initiatives, especially those focused on expanding its international space and promoting stronger economic and security links to its Indo-Pacific allies. By the same token, Lai could build on his extensive diplomatic experience as well as the Tsai administration's achievements in forging closer ties between Taiwan and the EU, experience that neither Ko nor Ho possess (although Ko has traveled to Europe in his function as mayor of Taipei City). Nonetheless, although incumbency can provide Lai with advantages on the foreign policy front, it will simultaneously create challenges for him on the domestic policy front



where President Tsai's initiatives have fallen well short of expectations, as demonstrated by the DPP's poor showing at the 2018 and 2022 local elections. As a result, Lai has resorted to framing the elections (in a typical DPP fashion) in terms of cross-Strait relations and other foreign policy issues.



# Conclusion

Three political parties have nominated and confirmed their candidates for the presidential elections on 13th January 2024 (and a fourth independent candidate is currently collecting signatures across the island to secure his nomination). As revealed by this report, the candidates' profiles differ significantly. Moreover, despite some overlap in their policy stances and propositions, the implications for cross-Strait and foreign relations will differ substantially based on who wins.

DPP candidate Lai Ching-te's major advantage lies in his incumbency. His vice presidency has strengthened his profile as an experienced politician with both local and national as well as legislative and executive experience. This resonates with the Taiwanese public that acknowledges his comparative skills<sup>128</sup> in managing cross-Strait and international affairs. Nonetheless, Lai has faced difficulties in convincing the US and other Indo-Pacific powers about his apparent departure from his previously established political identity as a "worker for Taiwan's independence". His interview with Bloomberg<sup>129</sup> is illustrative; time and again, Lai had to clarify his stance on Taiwan's independence and his roadmap to its realization. The other two candidates, Hou Yu-ih from the KMT and Ko Wen-je from the TPP, can benefit from their professional careers in law enforcement and medicine that they respectively had before entering politics in the early 2010s. As mayors of two big and important northern municipalities, New Taipei City and Taipei City, Hou and Ko have experience in local politics and subnational diplomacy, and both enjoyed popularity in their respective constituencies. Hou, however, lacks support within his party.

All three candidates have adopted a "pragmatic" approach towards the issue of Taiwan's sovereignty, and all pledge to uphold the status quo in cross-Strait relations, which is unanimously perceived as the only viable option for preserving Taiwan's *de facto* autonomy and democratic system. This stance resonates with the general voter's will, as roughly 87% of Taiwanese people prefer the status quo; only a fringe minority wants either formal independence or unification with China.<sup>130</sup>

Maintaining peace is the ultimate promise of each candidate's presidential bid. Not least because of Russia's invasion of Ukraine, defense policy discussions became paramount in this year's election campaigns. The

candidates agree on the vital importance for Taiwan to enhance its defense capacities to deter China from military adventurism, albeit each emphasizes a different aspect. Lai promises to continue the current government's reforms, with a strong focus on hard power and military capacities. Ko stresses the importance of emergency preparedness at the subnational level and awareness building among citizens and soldiers. Hou arguably faces the greatest dilemma on this issue: how to align an emphasis on increased defense capacities with his party's plan for seeking closer and more friendly relations with the CCP. He proposes a constructive dialogue with the PRC in combination with a strong military and enhanced cooperation with partners and allies as the best way to protect Taiwan from any military aggression.

Although Lai does not explicitly exclude dialogue with the PRC and has even echoed the idea of a "federation of brothers" with the Chinese people, his comments aimed at international audiences indicate that he will not actively seek dialogue with the Chinese leadership unless the latter meets the DPP's pre-conditions for any such talks, namely the recognition that Taiwan under the denomination of ROC is a *de facto* autonomous state. Meanwhile, Hou and Ko stress the importance of increasing exchanges and dialogue with Beijing at all levels of government and society. Similarly, as Lai, Hou, too, has made clear that his party will not renounce the existence of the ROC, thus its qualification for participation in international organizations. While he has a better chance of resuming high-level dialogue with the PRC due to a potential access to the CCP leadership through influential KMT factional leaders, such as former President Ma Ying-jeou and current vice chairman of the KMT Andrew Hsia, it is unclear how and to what extent he will be able to accommodate the demands of the deep-Blue faction without sacrificing too much of the moderate policy direction. Ko, on the other hand, is likely to manage cross-Strait relations with fewer ideological restraints and more flexibility. In contrast to Hou (and Lai), Ko as the founder of his own party, does not have the same ideological or factional liabilities. Still, his proclaimed dismissal of the "1992 Consensus" will limit the degree of dialogue and exchanges he will be able to have with the PRC. The CCP will most certainly not accept Ko's formula of "one family" as an equal alternative to the "1992 Consensus". Moreover, by welcoming Andrew Hsia and Ma Ying-jeou this year, the CCP has already signaled its preference regarding the Taiwanese party it wants to engage with. Not least for this reason, Hou portrays himself as the only candidate having the ability to resume high-level dialogue with the PRC.

Lai has been unequivocal about the importance of strong US-Taiwan relations, underscoring this commitment in his op-ed published by the Wall Street Journal as well as a widely circulated interview with Bloomberg<sup>131</sup>. Hou is the only candidate who lacks familiarity with the United States, which is why he is supported by KMT members with strong ties to Washington, including former party chairman Johnny Chiang and Alexander Huang, who is special advisor to the chairman and KMT representative to the United States. Similarly to the other two candidates, Hou has embarked on a “friendship visit” to the United States in September, during which he reiterated current party chairman Eric Chu’s reassurances that the KMT is a US-friendly party. The *Foreign Affairs* journal even published an op-ed under the name of Hou, granting him and his cross-Strait and deterrence propositions broad international visibility. In the event of his victory (which currently seems unlikely given Hou’s low approval rates), frictions in Taiwan-US relations are likely to emerge due to interventions from the KMT’s deep-Blue factional leaders who tend to pivot to China over the United States. Andrew Hsia’s participation in Hou’s visit to the United States was probably why the Chinese government behaved rather restrained. But the message was clear, Hou will have to accommodate deep-Blue sentiments and policy preferences in managing cross-Strait and foreign relations. Ko’s proclaimed pragmatism, flexibility, and professionalism as the three central creeds of his political ambitions contain a fair amount of ambiguity, particularly *vis-à-vis* the United States. He insists that Taiwan should sustain constructive relations with both China and the United States because of the island nation’s dependency on the goodwill of both great powers as well as its weak position in the US-China-Taiwan strategic triangle. Yet, Ko also stresses the importance of Taiwan’s self-reliance, with Taiwan carefully evaluating signals and benefits coming from both Beijing and Washington.

Relations with Japan have gained particular momentum in the election campaigns. Although visits of presidential candidates to Japan were not uncommon in the past, the current candidates’ engagement is particularly noteworthy. Ko and Hou traveled to Japan in May and August, respectively, meeting with high-level government representatives, while Lai received two delegations of Japanese lawmakers in May<sup>132</sup> and July<sup>133</sup>. Bilateral ties will likely be further strengthened under all three candidates, although Hou’s promises are likely to be overshadowed by those unfulfilled under former President Ma Ying-jeou.

All three candidates have some connections to the EU that they have attained either through subnational (city) diplomacy or engagements with

the official EU delegations to Taiwan. There has been an increase in the number of European lawmakers traveling to Taiwan, not least due to changing European attitudes towards China. Taiwan's relations with the bloc and specific EU member states have, nevertheless, barely featured in the election campaigns. Neither have candidates chosen to present their political programs in Brussels or any European country with a sizable Taiwanese diaspora (e.g., France or Great Britain). Indeed, Europe has never been a priority destination for Taiwanese politicians to travel to, let alone for those running for the highest office. Still, the absence of Europe in the ongoing election campaign surprises, especially considering that recent policy shifts in Taiwan have been greatly influenced by Russia's invasion of and the EU's support for Ukraine. This clearly shows the common viewpoint in Taiwan as to which country/region (i.e., the United States and its immediate neighbors) would lend it the most substantial support in the event of a PRC-led military aggression. This observation should prompt policymakers in Europe to reconsider their strategies, especially since the center of current geopolitics is shifting ever more towards the Indo-Pacific region.

This report has focused on the three candidates who have so far confirmed their presidential bids. At the time of writing, Terry Gou has officially declared his candidacy and presented his running mate. Gou, who is a former KMT member, had initially challenged Hou in an informal party primary earlier this year but lost the nomination process. His running mate is Tammy Lai, an actress who has famously acted as a presidential candidate in the Taiwanese political thriller *Wave Makers* broadcasted on Netflix. According to election regulations, Gou and Lai must collect signatures equal to at least 1.5% of the electorate (i.e., approximately 290,000) that had participated in the last legislative election until 2nd November. It is yet unclear whether they will succeed. Moreover, it is even less clear whether Tammy Lai, who holds double US-Taiwanese citizenship, will (be able to) renounce her US citizenship in time should they manage to get enough signatures. Nevertheless, Gou entering the race adds further dynamism into an already suspenseful election season and complicates vote distribution within the Blue camp with both Hou and Ko likely to lose out voters to the popular entrepreneur. Moreover, many observers, including Ko Wen-je himself, predict Lai Ching-te to win the race precisely due to Gou's candidacy that further divides the pan-Blue vote. Recent public opinion<sup>134</sup> polls show indeed Lai leading with 42%, followed by Ko with 24%, Hou with 22%, and Gou with 6%.





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