

**The Big Read** US foreign policy

## Will Trump abandon Taiwan?

The threat from China is rising — and the US president is keeping one of the world’s most dangerous flashpoints in suspense



Chinese President Xi Jinping, US President Donald Trump and Taiwan’s President Lai Ching-te © FT montage/Getty Images

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Pete Hegseth warned a prominent Asian security forum in Singapore a year ago that a Chinese invasion of Taiwan could be “imminent”. But when the US defence secretary made a return visit just over a week ago, his speech did not even mention the word “Taiwan”.

Last year Hegseth said the US was focused on “deterring aggression by Communist China”. This time, he told the defence ministers and military officials at the IISS Shangri-La Dialogue that Sino-US ties were in their best shape in years.

And yet in the intervening 12 months, China’s People’s Liberation Army has only increased its threatening behaviour across the Taiwan Strait.

PLA warplanes are flying more often across the median line in the Strait that long served as an unofficial buffer designed to preserve stability.

In another sign of mounting pressure, Chinese navy and coastguard ships are more frequently sailing all the way around the island. Admiral Samuel Paparo, head of US Indo-Pacific Command, has warned that PLA exercises should be viewed as “rehearsals” for military action.

Hegseth’s failure to mention Taiwan did not come in isolation. It followed comments US President Donald Trump made after a Beijing summit with China’s President Xi Jinping last month — remarks that made Taipei nervous about his commitment to the country.

In Taipei, some officials maintain that the Chinese leader psychologically dominated Trump, who echoed some of Xi’s rhetoric on Taiwan’s President Lai Ching-te. Trump also made comments about American arms sales to Taiwan that led critics to worry he was giving Beijing a say in the outcome.

“Xi won the cognitive war,” says one diplomat in Taipei.

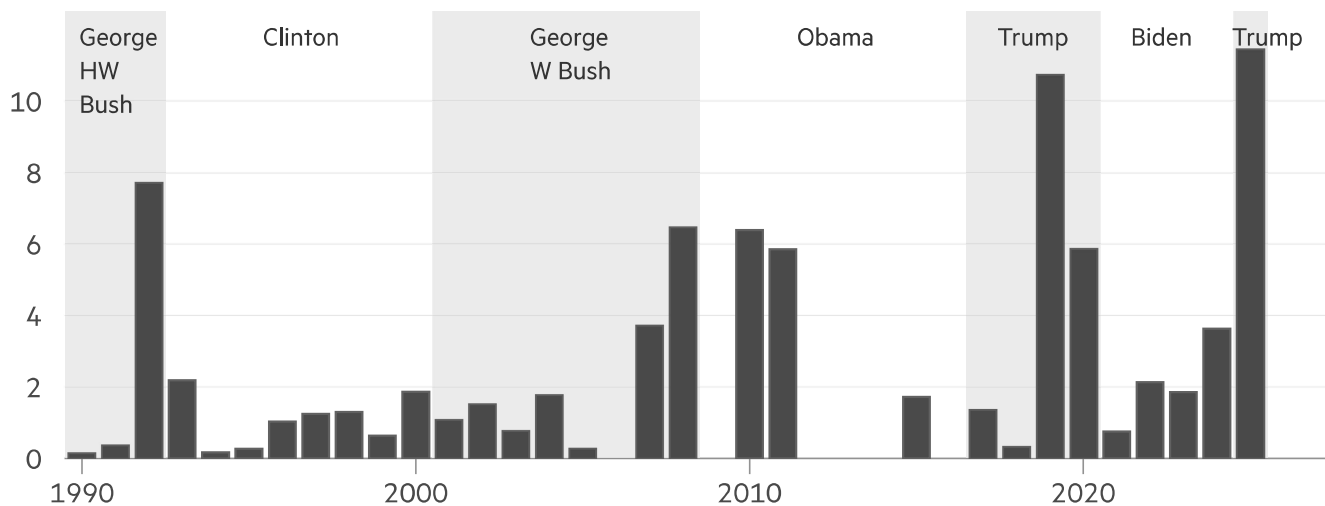
Another person familiar with the thinking in Taiwan’s ruling Democratic Progressive Party adds: “Trump got Xi Jinping fever in his head.”

Taiwan, which depends heavily on US weapons to deter China, pays laser-like attention to conversations between the two countries’ leaders because its very existence as a de facto independent state is at stake.

It has relied on American support since Ronald Reagan privately provided it with assurances in 1982, three years after Washington had switched its diplomatic recognition from Taipei to Beijing.

## The Trump administrations have overseen the highest level of US arms sales to Taiwan

Arms sales reported to Congress (\$bn)\*



Source: [Defense Security Cooperation Agency](#), [US Taiwan Business Council](#) • \*Data refers to 'foreign military sales', a government-to-government mechanism. US arms sales above certain thresholds require congressional notification and a 30-day review before proceeding

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Trump has approved more weapons for Taiwan, including a record \$11.1bn package in December, than any of his predecessors. But after his meeting with Xi, he told Fox News that US weapons were a “good negotiating chip” for dealing with China, an unprecedented suggestion by a US president that Beijing could influence a decision on providing Taiwan with arms.

Trump also appeared to accept Xi’s assertion that Taiwan’s Lai was pushing for independence and suggested that he would be reluctant to send the US military “9,500 miles to fight a war” in the Taiwan Strait.

His comments raised questions about whether he would proceed with a planned \$14bn arms package for Taiwan and about the US response if the island were attacked by the PLA — a scenario some analysts fear could occur during his term.

It was a striking outcome in the wake of the meeting between the world's two most powerful men and one with potentially significant consequences for one of the world's most dangerous flashpoints.

“China really wanted three things from Trump on Taiwan — and it got all three,” argues Ryan Hass, director of the China Center at the Brookings Institution.

“The first was a visible sense that the US cares more about China than Taiwan. The second was to feed a perception that major decisions on Taiwan must run through Beijing. And the third was to introduce uncertainty into America's future approach to cross-Strait relations.”

A White House official says US policy on Taiwan remains unchanged and that Xi had assured Trump that he would not invade Taiwan.

The Pentagon dismisses criticism of Hegseth not referring to Taiwan. A defence official says his speech focused on deterrence and burden sharing and addressed “the region as a whole, not any single issue or contingency”.

But Trump's and Hegseth's comments come at a pivotal time.



Back in 2021, Admiral Phil Davidson, who then commanded US forces in the Indo-Pacific, warned that China could attack by 2027 — because of several factors including the rapid improvement in its military capabilities.

At present, most US officials do not think Beijing will attack next year but some military experts worry about what could happen in 2028 and beyond.

After Xi starts his fourth term as Communist Party general secretary in late 2027, he may focus more on his legacy — and notably the status of Taiwan, which the People's Republic has claimed since its foundation in 1949. Taiwan is likely to hold a presidential election in early 2028 and could re-elect Lai, who Beijing denounces as a “dangerous separatist”.

America's allies were already nervous about US “magazine depth” — a reference to its arms stockpiles — in Asia, but those concerns have deepened in recent months because the Iran war has severely depleted key weapon arsenals.

## The words that worried Taipei

Ahead of the Beijing summit, some security experts thought Trump might give in to Chinese pressure in a clear way — by saying he “opposes” Taiwanese independence.

Such a statement would be a big shift in American “declaratory” policy because it would replace more neutral language, including Trump's 2025 national security strategy which said Washington “does not support any unilateral change to the status quo in the Taiwan Strait”.

Along with “strategic ambiguity” — the US refusal to say if it would defend Taiwan — declaratory policy is designed to make China think twice about attacking the island and make Taipei less likely to declare independence.



Last year secretary of defence Pete Hegseth said the US was focused on ‘deterring aggression by Communist China’, but on stage just over a week ago at the IISS Shangri-La Dialogue he said that Sino-US ties were in their best shape in years © Edgar Su/Reuters Critics were relieved when Trump appeared to leave policy intact. But then, immediately after his summit with Xi, came his interview with Fox News.

Reigniting concerns that he would prioritise relations with Beijing at the expense of Taipei, Trump repeated Chinese rhetoric about Lai, saying: “They have somebody there now that wants to go independent.”

DPP officials stress the Taiwanese president has no need to declare independence because the island is already a sovereign state.

Most worrying of all for Taipei was Trump’s reference to weapons as a negotiating chip — the only example on record of a US president suggesting that China could influence a decision on arms sales to Taiwan.

Such a stance would violate a promise given by Reagan to Taipei in 1982 that the US would not consult Beijing on arms sales to Taiwan.

Trump told Fox that he had not yet decided whether to approve the arms sales. “I’m holding that in abeyance, and it depends on China,” he added. The White House says his decision will come in a “fairly short time”.

His comments were welcomed in China. Wang Dong, a senior scholar at Peking University, says the US president “made some very important statements on Taiwan” in the interview.

“He came very, very close to publicly stating, explicitly stating, that he opposed Taiwan independence,” Wang adds.

By contrast, the Taiwanese public has already registered rising concern about Trump. About 40 per cent of respondents in a poll two weeks before the Trump-Xi summit considered it unlikely that the US would defend Taiwan from a Chinese attack.



A Chinese Coast Guard vessel patrols waters off the city of Xiamen earlier this year © Daniel Ceng/Anadolu/Getty Images

“The way Trump interprets the relationship between him and Xi causes turbulence,” says Wang Ting-yu, a DPP lawmaker.

But he adds that the “cornerstone” of the relationship is strong, a reference to America’s 1979 Taiwan Relations Act. That landmark law requires the US to have the military capability to resist any force that would jeopardise the island’s security and to provide it with sufficient weapons for its defence.

US officials have also urged people to focus less on Trump’s rhetoric and more on the actions he takes. They note that last December’s arms package was more than the \$8.4bn Biden approved over four years.

According to figures compiled by the US-Taiwan Business Council, Trump also approved \$18.3bn in his first term, outstripping every other president.

But America’s allies are still debating how much weight to put on Trump’s words rather than his deeds — and how one may affect the other.

Josh Cartin, a senior Asia official in the first Trump administration and partner at TD International, a strategic intelligence firm, says that in the months leading up to the summit, “conventional wisdom from some quarters” was that Trump would change declaratory policy, but he did not.

“Trump made it through the summit with no change and then did the Fox interview,” Cartin says. “Suddenly, everyone who had been wrong said, ‘Aha, we told you there would be a change’. That is just how Trump communicates. He creates ambiguity, or what some might say is preserving optionality.”

China's military spending has sharply risen over decades and recent years have seen an uptick in terms of GDP



FINANCIAL TIMES

Source: SIPRI • \*estimated; in constant 2024 prices and exchange rate

But Kevin Rudd, the former Australian prime minister and a China expert who now heads the Asia Society think-tank, says there is concern about the “future of US deterrence posture” in east Asia and the western Pacific.

He argues that two different elements need to be taken into account.

“One is military capability which, despite Iran diversions, remains in solid shape, albeit with some concerns about magazine depth,” Rudd says.

“The second part of deterrence is perceived US political will to deploy military assets in a crisis,” he adds. “That’s where concerns have arisen in various parts of the region as a result of the president’s recent interview on Fox . . . Deterrence, after all, to be effective is about both capability and intention.”

Rebecca Lissner, an Asia security expert at the Council on Foreign Relations, concurs: “The more Trump signals a lack of interest in Taiwan, whether that is saying that arms sales are a bargaining chip or that Taiwan is far from the US, the more it sows doubt in a way that erodes deterrence.”

## The fate of the arms package

The key test of Trump’s stance on Taiwan this year is likely to be how he proceeds on the \$14bn in planned weapons sales.

Will he approve the package in its entirety, break it into pieces to be unveiled in stages, or delay everything until after September when Xi is expected to make a reciprocal visit to Washington?



Taiwan’s President Lai Ching-te leads an inspection of army reservists at a facility in Yilan county in December © I-Hwa Cheng/AFP/Getty Images

In testimony to Congress last week, secretary of state Marco Rubio said the package was not subject to a “pause” but was “under a review” because of the implications the huge package had for the US’s defence industrial base.

Some experts also note that most presidents have frozen arms sales for periods of time to reduce friction with China or to pursue foreign-policy goals.

“Arms sales may not previously have been discussed as a negotiating chip, but they’ve always been subject to all kinds of policy considerations,” says Cartin, the former Trump official. “Trump didn’t say anything that differs from US policy in practice.”

Nick Snyder, an Asia security expert at the Hudson Institute and former senior state department official, says there is little sense in the US announcing a major package ahead of hosting Xi in September given that Trump’s goal is to stabilise relations with China.

“Any sale before then would cause Xi to cancel his visit given that he framed the May summit as a success on Taiwan,” Snyder says.

“Arms sales really aren’t the right metric by which to judge the US-Taiwan relationship,” he adds. “It should be judged on how ready Taiwan and America, alongside our allies, are to deter Chinese aggression. This is something we have been preparing for a while and Xi knows it.”

US Indo-Pacific Command continues to work closely with other countries regardless of Trump’s sometimes harsh language about allies. Recent joint military exercises with the Philippines involved a record number of partners including Japan, Australia, New Zealand and Canada.

“Taiwan policy may seem very confused because of Trump’s rhetoric, but there is robust engagement at the . . . working level and things are full speed ahead,” says Kharis Templeman, a Taiwan expert at the Hoover Institution.

Hegseth himself indicated that military resources matter much more than any emollient comments by officials.

In Singapore, seeking to explain the US approach to the Indo-Pacific, he adapted a phrase from former president Theodore Roosevelt, saying Washington would “speak and walk softly while carrying a big stick”.



A Taiwanese soldier prepares to launch a drone during an exercise on maritime targets last week © Taiwan Military News Agency/AFP/Getty Images

But some worry that cutting arms sales to placate Xi would undermine the power of that “stick” and send a bad message to partners.

“Allies won’t stick their necks out for Taipei if Trump is reducing support for Taiwan and cosying up to China. Beijing will take actions at some point that test the Taiwanese and US response,” says Ely Ratner, a former top Pentagon official now at the Marathon Initiative think-tank.

“That is where the lack of trust and engagement with Taiwan, coupled with the lack of broader international attention and a lack of preparation for a crisis, is really going to matter.”

Bonnie Glaser, a China expert at the German Marshall Fund, says Beijing is angling for more following Trump’s series of controversial comments to Fox.

“Trump said Lai is seeking independence and wants to start a war — that suggests Xi really shaped his thinking in Beijing,” she says. “Before the summit many Chinese were signalling that breaking up the arms package would be sufficient. But now they’re saying ‘no arms sales this year’ because they got things out of Trump and so are even more ambitious now about what they can get on Taiwan.”

## A consequential conversation

In the searing summer heat of Taiwan, the rising concern about US commitment to its security has been partly eclipsed by the AI boom.

As the world’s leading advanced chip manufacturer, the country has benefited from Big Tech’s almost insatiable demand for advanced semiconductors, which is only expected to grow as AI companies push ahead with IPOs.

Taiwan manufactures 90 per cent of the advanced chips the world needs for cutting-edge AI, making its strategic value all the more important.

But within governing circles there is nervousness about three more Xi-Trump meetings this year. In addition to Xi’s scheduled trip to Washington, the leaders will probably meet at the APEC forum in Shenzhen in November and the G20 in Miami the following month.

That nervousness comes at a difficult time in domestic politics.

Earlier this year, the opposition KMT forced Lai’s DPP to cut a defence spending bill from \$40bn to \$25bn, providing enough money for US arms but not for domestically produced weapons, including drones.

The KMT fled mainland China in 1949 after losing the civil war to Mao Zedong’s Communist Party.

It is much more willing than the DPP to talk to the mainland, with which it agrees that there is only “one China” while disputing who rules the country — Beijing or Taipei. Shortly before the Trump summit, Cheng Li-wun, KMT chair, visited China for her own meeting with Xi.



Donald Trump and Xi Jinping attend a welcome ceremony at the Great Hall of the People in Beijing in May. US officials have urged people to focus less on Trump's rhetoric and more on the actions he takes © Alex Wong/Getty Images

The DPP, by contrast, says that Taiwan is a sovereign state. That enrages Beijing, which has refused to rule out force to bring Taiwan into its fold.

Trump introduced another wild card when he said in Beijing that he would speak to Lai about arms sales, adding on Friday that “I’ll always talk to him”.

Since the US switched diplomatic recognition from Taipei to Beijing, no American president has spoken to a Taiwanese leader, although as president-elect in 2016 Trump held a phone call with Lai’s predecessor Tsai Ing-wen.

People familiar with the situation in Washington and Taipei say no preparations have been made for a call and the prospect of one has significantly subsided. But DPP officials are still concerned that a call could spark a crisis, particularly if Trump warns Lai not to declare independence.

“The DPP is quite nervous,” says Jaw Shaw-kong, a senior KMT politician. “They expect a Trump call, but don’t want a Trump call.”

Taiwanese officials are painfully aware of Trump's meeting last year with the leader of another partner country threatened by a powerful neighbour: Volodymyr Zelenskyy of Ukraine.

"We don't want a Zelenskyy moment," says the person familiar with the DPP's thinking. For now, Taiwan is living in suspense.

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