



## **TRANSACTIONAL DIPLOMACY AND STRATEGIC AMBIGUITY IN THE TAIWAN STRAIT**

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When Donald Trump told reporters in February 2026 that he had discussed Taiwan arms sales with Xi Jinping, the headlines wrote themselves. Commentators warned of betrayal; Taiwanese talk shows speculated about secret concessions. Yet the policy record shows continuity.

The administration reaffirmed commitments under the [Taiwan Relations Act](#). The [December 2025 arms package](#) moved forward. Existing contracts for HIMARS rockets, Harpoon coastal defense missiles, and Stinger systems remained in production queues already strained by US replenishment after Ukraine aid and NATO demand. Delays of two to four years on some systems predate Trump's remarks; they stem from limited production lines, not diplomatic hesitation.

So why mention Taiwan at all in talks with Beijing?

Because arms sales are signals as well as logistics. They shape expectations on all sides. Trump's public ambiguity of "a good conversation" and "pretty soon" fit a pattern: preserve negotiating space before an [April summit](#) while keeping policy intact. It looked dramatic, but it was consistent with a familiar reality of great-power diplomacy: adversaries often discuss the very issues that divide them most.

### **Transactional diplomacy and its risks**

Trump's foreign policy instinct is ledger-based. [Tariffs](#), fentanyl precursor enforcement, technology export controls, and Taiwan

arms deliveries sit in one bargaining frame. Raising Taiwan with Xi is not granting veto power; it reminds Beijing that US leverage operates across domains.

There are practical reasons to talk. First, consultations reduce surprise. Beijing reacts less sharply when it believes its objections were heard, even if ignored. Second, slowing announcements without cancelling contracts helps a defense-industrial base carrying a [Taiwan backlog of \\$32 billion](#) as of Jan. 31, including systems approved years ago but not yet delivered. Third, dialogue clarifies trade-offs. Washington wants stricter chemical export controls; Beijing wants softer rhetoric on Taiwan. Each side signals flexibility without changing core commitments.

But transactional diplomacy carries real risks.

Beijing might interpret consultation as proof that pressure works. Allies such as Japan or the Philippines could fear US policy becoming negotiable. Ambiguous rhetoric might invite miscalculation if Chinese planners mistake signalling for hesitation. Trump's style magnifies these risks because unpredictability is central to his leverage.

The question, then, is not whether dialogue is wrong. It is whether ambiguity is calibrated well enough to deter without encouraging brinkmanship.

### **The backlog problem is structural**

The loudest criticism of Trump's remarks focuses on delivery delays. Taiwan's defense planners worry that weapons arriving in 2029 do little good in 2026. This concern is valid. But it is not new. [Harpoon coastal defense missiles](#) approved earlier in the decade are still in production. [Stinger inventories](#) fell sharply after transfers to Ukraine. [HIMARS demand](#) surged among NATO members. US factories can build only so many launchers, seekers, and rocket motors per year. Taiwan is competing with allies and with US stockpile rebuilding.

The credibility test for Washington is therefore industrial, not rhetorical. Expanding missile production, funding multi-year procurement contracts, and coordinating with partners on co-

production would do more for deterrence than any summit communiqué.

Dialogue with Beijing does not fix this problem. But neither does outrage about it. The bottleneck is steel, electronics, and skilled labour.

#### **Taiwan's politics: Argument inside consensus**

From abroad, Taiwan's politics can look fractious. Yet the major parties share a baseline: avoid war, preserve autonomy, maintain US ties.

Under President Lai Ching-te, the Democratic Progressive Party (DPP) [emphasizes](#) close security alignment with Washington, [extending conscription to one year](#) and [boosting domestic missile production](#). It argues that visible US support deters aggression.

The Kuomintang (KMT) stresses economic stability and dialogue, questioning whether expensive systems delivered late improve deterrence. Critics see softness; supporters see realism about Taiwan's fiscal limits and exposure to retaliation.

The Taiwan People's Party (TPP) [pushes](#) procurement reform, anti-corruption oversight, and phased spending plans, arguing that Taiwan must absorb weapons effectively rather than simply buy them.

These debates reflect real trade-offs. Taiwan spends [roughly](#) 2.5–3% of GDP on defense, below some US recommendations but high for a densely populated democracy facing economic pressure. Voters support stronger defense but resist steep tax increases. Parties navigate those contradictions.

Trump's comments produced a [muted reaction in Taipei](#) because leaders recognize this pattern. Rhetoric shifts; procurement schedules matter more.

#### **Beijing's strategy: Pressure short of war**

China's response was predictable: [warnings](#) about red lines, [sanctions on US defense firms](#), and [flights near Taiwan's air defense zone](#). These moves signal resolve without crossing thresholds that risk war.

Inside China, [military reforms and anti-corruption campaigns](#) aim to tighten political control. Analysts disagree about their operational impact. Some argue they disrupt unit cohesion; others say they improve discipline. Either way, large-scale reform rarely aligns with immediate invasion planning.

China also faces structural economic [pressures](#) such as property debt, youth unemployment, export volatility. War over Taiwan would magnify those strains. Gray-zone tactics which include cyber operations, economic leverage, and military drills offer pressure without catastrophe.

Chinese media [praised](#) Trump's willingness to discuss arms sales, framing it as recognition of Beijing's influence. That propaganda costs Washington little, yet it lets both sides step back from escalation.

Still, Beijing watches carefully. If consultation looks like hesitation, pressure will intensify. If deliveries accelerate, rhetoric will harden. China's strategy adapts to perceived US resolve.

#### **What will actually matter**

Two developments will matter more than February's headlines.

First, the [Trump–Xi summit](#). Even modest agreements such as restored military hotlines, fentanyl precursor controls, and [tariff enforcement](#) could stabilize relations while arms sales continue quietly. Diplomacy often works through incremental steps that look trivial until crises erupt.

Second, [Taiwan's defense reform](#). Prioritizing quickly deployable systems such as [coastal missiles and drones](#), hardened bases, and [reserve training](#) would strengthen deterrence regardless of summit outcomes. Budget compromises that speed absorption matter more than rhetorical unity.

Regional allies are watching. [Japan's defense planners](#) track delivery timelines closely. The Philippines measures US credibility by presence and logistics, not speeches. The Indo-Pacific deterrence architecture depends on consistency over time.

#### **The real lesson**

Trump's remarks were not an inflection point in Taiwan policy. They were a reminder that deterrence is built from three ingredients: capability, credibility, and communication. Remove any one, and the structure weakens.

Washington can talk to Beijing without abandoning Taipei. Taipei can debate budgets without losing resolve. Beijing can threaten without wanting war. Each side maneuvers within constraints it cannot escape.

The risk lies not in conversation itself but in misunderstanding the purpose of conversation. If words are mistaken for concessions, crises follow. If dialogue is treated as weakness, pressure escalates. But when adversaries speak clearly about weapons they still intend to deliver, they reveal an uncomfortable truth of geopolitics: peace sometimes survives not because trust exists, but because all sides understand exactly how much destruction lies behind every sentence.

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