

The U.S. Policy Toward Taiwan Beyond Donald Trump

Mapping the American Stakeholders of U.S.-Taiwan Relations

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► Key Takeaways

- Over the past year, the Trump 2 administration brought back uncertainty and volatility in U.S. foreign policy, including vis-à-vis China and Taiwan. Trump has used harsh language about Taiwan and often seems to prioritize a trade deal with Beijing over Taiwan's security.
- Yet unpacking the U.S. policy toward Taiwan reveals that Donald Trump is not the only stakeholder. First, besides the president, government agencies have proved consistent in sustaining political and military cooperation with Taiwan.
- Congress remains the most reliable institution upholding closer cooperation with Taiwan, advancing bipartisan laws that expand defense, energy, and space cooperation.
- The American tech giants have expanded investments in Taiwan's semiconductor, AI, and cloud ecosystem, embedding U.S. technological competitiveness in Taiwan.
- Ultimately, whether Donald Trump is genuinely interested in Taiwan's security or not, there are heavy counterweights in the U.S. and a wide consensus in Congress and industry in support of Taiwan.

Introduction

Donald Trump's return to the White House reintroduced acute uncertainty into the security commitment of the United States (U.S.) to Taiwan. Unlike President Joe Biden, who repeatedly stated the determination to defend Taiwan,¹ President Trump refrains from commenting on the hypothetical U.S. response in the context of a cross-strait crisis.² Rather, his only comments—very debatable and largely unfounded—have consisted of assessing that “China doesn't want to do that [i.e., invade Taiwan]”,³ and quoting Xi Jinping during a phone call as saying, for instance: “He told me, ‘I will never do it as long as you're president’.”⁴ In addition, he has harshly criticized Taiwan for “stealing” the American semiconductor industry, and pressured Taiwanese industries to invest ever more in the U.S.⁵ While there is no evidence of Trump's intention to abandon Taiwan, or bargaining it away for a trade deal with Beijing as some have anticipated,⁶ the question of whether the U.S. would intervene if Beijing attempted forcible unification with Taiwan looms larger than at any point in the recent decades.

Yet, focusing exclusively on presidential rhetoric risks overlooking the deeper structural forces shaping U.S.-Taiwan relations. The U.S. policy toward Taiwan is sustained not only by the president but also by a wider, more complex system of stakeholders, including executive agencies, Congress, as well as the American industrial technological base. This *Memo* aims to make sense of the U.S. policy on Taiwan by mapping these different stakeholders and drawing perspectives on the future of U.S.-Taiwan relations under Trump 2.

U.S. government agencies: overall consistency in dealing with Taiwan

Close observation of U.S. government agencies dealing with Taiwan reveals a strong degree of continuity across administrations in support of Taiwan, including Trump 2. Heading the State Department as well as the National Security Council, Marco Rubio is a long-standing China hawk and a supporter of Taiwan. In 2025, Rubio made several

1. B. David, H. Trevor, “Biden Says U.S. Forces Would Defend Taiwan in the Event of Chinese Invasion”, Reuters, September 19, 2022, available at: www.reuters.com.

2. K. Razdan, “Donald Trump Declines to Say Whether US Would Defend Taiwan in Attack By Mainland China”, *South China Morning Post*, February 27, 2025, available at: www.scmp.com.

3. D. Nerozzi, “Trump Claims China ‘Doesn't Want to’ Invade Taiwan”, Politico, October 20, 2025, available at: www.politico.com.

4. J. Ward, “Trump Says Xi Told Him China Will Not Invade Taiwan While He Is US President”, Reuters, August 16, 2025, available at: www.reuters.com.

5. M. Seema, “Trump Accuses Taiwan of Stealing U.S. Chip Industry. Here's What the Election Could Bring”, CNBC, October 28, 2024, available at: www.cnbc.com.

6. D. Grossman, “Trump Can't Be Trusted to Defend Taiwan”, *Nikkei Asia*, January 19, 2026, available at: <https://asia.nikkei.com>; L. C. Hui, “Trump's Transactionalism Turns Taiwan into a Bargaining Chip”, *East Asia Forum*, November 4, 2025, available at: <https://eastasiaforum.org>.

comments indicating the sustained U.S. position on Taiwan. In February 2025, he stated: “We are against any forced, compelled, coercive change in the status of Taiwan. That’s been our position since the late 1970s, and that continues to be our position, and that’s not going to change.”⁷ Regarding the disputed case of a deal with China, Rubio made clear in October: “If what people are worried about is we’re going to get some trade deal where we’re going to get favorable treatment on trade in exchange for walking away from Taiwan — no one is contemplating that.”⁸

The American Institute in Taiwan (AIT)—the U.S. government’s representative office in Taipei—serves as the primary diplomatic and security liaison, facilitating defense dialogue and policy coordination. The AIT is also very active in countering Beijing’s narrative and manipulation of history. For instance, when China’s Foreign Minister Wang Yi argued that the Cairo and Potsdam Declarations require Taiwan to be returned to China,⁹ the AIT emphasized that neither document determines Taiwan’s postwar status.¹⁰

The U.S. Department of War (DoW, former Department of Defense), meanwhile, plays a central role in U.S.-Taiwan relations, managing arms sales, training, and security-related engagement within the scope of authorities delegated by the president. While the president retains ultimate control over the executive branch, these activities are implemented through established interagency procedures, statutory requirements, and long-term planning processes, which shape how policy decisions are translated into practice. Secretary of War Pete Hegseth warned about the “China threat” in the Indo-Pacific: “Any attempt by Communist China to conquer Taiwan by force would result in devastating consequences for the Indo-Pacific and the world. There’s no reason to sugarcoat it. The threat China poses is real.”¹¹

In recent months, the U.S. administration published two important doctrinal documents. The first, the *2025 U.S. National Security Strategy* (NSS), published by the White House, acknowledges China’s rise and the challenges it poses to the U.S. It mentions Taiwan eight times, the highest frequency in the history of the NSS, underscoring Taiwan’s critical role in maintaining stability in the Indo-Pacific and safeguarding the security of global supply chains.¹² Paradoxically, the second document, the DoW’s *2026 National*

The U.S. Department of War plays a central role in U.S.-Taiwan relations

7. M. Rubio, “Secretary of State Marco Rubio With Brian Kilmeade of Fox News”, U.S. Department of State, February 26, 2025, available at: www.state.gov.

8. “Rubio Says U.S. Won’t Change Taiwan Policy for China Deal”, *The Japan Times*, October 26, 2025, available at: www.japantimes.co.jp.

9. “Wang Yi: Taiwan’s Return to China Forms an Important Part of the Post-War International Order”, Ministry of Foreign Affairs of the People’s Republic of China (PRC), March 7, 2025, available at: www.fmprc.gov.

10. D. Duncan, “American Institute Says Taiwan’s Status Still Undetermined”, *Taiwan News*, September 19, 2025, available at: www.taiwannews.com.tw.

11. P. Hegseth, “Remarks By Secretary Of Defense Pete Hegseth at the 2025 Shangri-La Dialogue in Singapore”, U.S. Department of War, May 31, 2025, available at: www.war.gov.

12. *National Security Strategy of the United States of America*, The White House, November 2025.

Defense Strategy, does not mention Taiwan at all. Yet the document puts as the second priority to “Deter China in the Indo-Pacific through strength, not confrontation”. To do so, the DoW announced it “will erect a strong denial defense along the First Island Chain”,¹³ which implicitly includes Taiwan.

Operational military cooperation between the U.S. and Taiwan continues under Trump 2. In October 2025, for instance, the 2nd Infantry Battalion of the Taiwan Marine Corps’ 66th Brigade deployed to Guam aboard the Yushan-class landing platform dock for a month-long exercise with the U.S. Marine Corps.¹⁴ On November 19, 2025, Washington approved a nearly \$700 million sale of advanced missile systems for Taiwan—its second arms package in a week, bringing total sales to roughly \$1 billion and underscoring sustained U.S. support for Taiwan’s self-defense.¹⁵ On December 18, 2025, Washington approved an even larger arms sale to Taiwan valued at \$11.1 billion. This sale covers several critical items and weapons: the Taiwan Tactical Network and Team Awareness Kit, which is crucial for infantry to share instant combat information with command to gain the full picture of the battlefield; AH-1W helicopter spare parts and related equipment; M109A7 self-propelled howitzers; the additional procurement of high mobility artillery rocket systems (HIMARS) and related equipment; antiarmor UAV missile systems for the army; the Javelin missile system and related equipment, which are important for strengthening asymmetric warfare capability; and Harpoon missile repair follow-on support and related equipment for the navy.¹⁶ These developments illustrate that U.S. military assistance continues to strengthen Taiwan’s self-defense capabilities and to fulfill its security commitment to Taiwan during the second Trump administration.

The U.S. Congress: The bipartisan commitment of the legislative power promoting U.S.-Taiwan relations

The U.S. Congress remains the most consistent and influential pro-Taiwan actor shaping U.S.-Taiwan relations. Bipartisan consensus has produced a steady flow of legislation strengthening Taiwan’s defense, economic security, and international presence.¹⁷

Since 1979, when President Nixon established diplomatic relations with the People’s Republic of China (PRC) and cut official ties with the Republic of China (Taiwan), the U.S. Congress passed the Taiwan Relations Act in order to constrain the executive power to

13. 2026 *National Defense Strategy*, The U.S. Department of War, January 23, 2026.

14. “Taiwanese Marine Corps Deployed to Guam for Joint Training”, Central News Agency (CNA), November 24, 2025, available at: www.cna.com.tw.

15. “US Sells \$700m NASAMS Missile System to Taiwan”, *Al Jazeera*, November 19, 2025, available at: www.aljazeera.com.

16. “US Government Officially Notifies Taiwan of Latest Arms Sale”, Ministry of Foreign Affairs (Taiwan), December 18, 2025, available at: <https://en.mofa.gov.tw>.

17. L. Ashley, “In an ‘America First’ Era, Taiwan Gains Ground in Congress,” *The Diplomat*, September 23, 2025, available at: <https://thediplomat.com>.

maintain unofficial relations with Taiwan. The text includes provisions to prevent any forceful unification means by the PRC, in particular, it finds necessary:

- to consider any effort to determine the future of Taiwan by other than peaceful means, including by boycotts or embargoes, a threat to the peace and security of the Western Pacific area and of grave concern to the United States;
- to provide Taiwan with arms of a defensive character;
- to maintain the capacity of the U.S. to resist any resort to force or other forms of coercion that would jeopardize the security, or the social or economic system, of the people on Taiwan.¹⁸

The Taiwan Relations Act remains the fundamental legal framework governing relations between the United States and Taiwan to this day. By embedding these commitments in U.S. domestic law, the Act has provided durable statutory authority for U.S.-Taiwan relations and created space for subsequent evolution for deepening these relations under changing regional and domestic conditions.

Fast forward to the last decade, during President Donald Trump's first term, Congress laid important groundwork for a more expansive approach to U.S.-Taiwan engagement through a series of bipartisan legislative initiatives. A key example is the Taiwan Travel Act, enacted in March 2018, which expressed the sense of Congress that the United States should encourage visits between U.S. and Taiwanese officials at all levels. The Act called for permitting senior U.S. federal officials to travel to Taiwan, allowing high-level Taiwanese officials to enter the U.S. under respectful conditions, and facilitating more regular interactions between Taiwan's representative offices and U.S. authorities. While non-binding in nature, these measures signaled clear congressional support for higher-level official interactions and closer cooperation, even as implementation remained subject to executive authority and existing policy constraints.¹⁹ Yet, officials from the Trump administration did travel to Taiwan in their official capacity, such as U.S. Health and Human Services (HHS) Secretary Alex Azar, who led a delegation to Taiwan in 2020, the highest-level visit by a U.S. Cabinet official since 1979.²⁰

Since Donald Trump returned to the White House, Congress has kept advancing new legislation moving forward bilateral cooperation with Taiwan

Congress is also consistent in providing Taiwan with defense capabilities. The National Defense Authorization Act 2025 (NDAA), passed by Congress in December 2024, includes a

18. *Taiwan Relations Act*, U.S. Congress, April 10, 1979, available at: www.congress.gov.

19. *Taiwan Travel Act*, U.S. Congress, March 16, 2018, available at: www.congress.gov

20. "HHS Secretary Alex Azar to Lead Delegation to Taiwan in First Visit by A U.S. HHS Secretary", American Institute in Taiwan, August 5, 2020, available at: www.ait.org.tw.

Taiwan security cooperation initiative and related provisions such as the establishment of a Taiwan-U.S. military trauma care program, encouragement of enhanced defense industrial cooperation, and strengthening Taiwan's defense capabilities.²¹

Since Donald Trump returned to the White House, Congress has kept advancing new legislation moving forward bilateral cooperation with Taiwan. On December 2, 2025, the U.S. Senate passed the Taiwan Assurance Implementation Act, subsequently signed into law by President Trump, which requires the U.S. State Department to regularly review and update its guidelines governing engagement with Taiwan.²² The Act directs the State Department to identify opportunities to relax longstanding self-imposed restrictions on official contacts with Taiwan. Since Washington shifted diplomatic recognition from Taipei to Beijing in 1979, such restrictions have structured U.S.-Taiwan interactions; the legislation's core objective is to reassess and selectively roll back these constraints within an updated policy framework.²³

In September 2025, American Senators have as well introduced a bipartisan bill to strengthen Taiwan's energy security—its utmost strategic weakness²⁴—and increase LNG exports to Island.²⁵ The bill also encourages Taiwan to maintain nuclear energy and adopt emerging technologies such as small modular reactors, promoting cooperation with the U.S.²⁶

In September as well, the U.S. Senate introduced the Taiwan and American Space Assistance (TASA) Act of 2025—mirroring the name of the Taiwan Space Agency, TASA—which intends to expand U.S.-Taiwan cooperation in space.²⁷ NASA and NOAA currently face strict limits on cooperating with TASA. The TASA Act would direct NASA and NOAA to collaborate with Taiwan on satellite development, space exploration, and atmospheric and weather programs.²⁸

In February 2026, the U.S. House of Representatives passed the PROTECT Taiwan Act, with 395 votes in favor and two against, to deter China's growing intention of military action toward Taiwan. The bill states that the U.S. would exclude China from international financial institutions, such as the Bank for International Settlements and Financial Stability Board, if China's actions pose any threat to Taiwan's security, economic or social system. Regarding the bill, Representative French Hill made clear: "The bill sends a clear

21. "MOFA Thanks U.S. Senate for Passing Taiwan Assurance Implementation Act," Ministry of Foreign Affairs (Taiwan), November 20, 2024, available at: <https://en.mofa.gov.tw>.

22. *Taiwan Assurance Implementation Act*, U.S. Congress, December 2, 2025, available at: www.congress.gov.

23. H. C. James, "Trump Signs Bill Mandating Reviews of Taiwan Engagement Limits", *Nikkei Asia*, December 3, 2025, available at: <https://asia.nikkei.com>.

24. A. Simorre, "Taiwan's Energy Supply: The Achilles Heel of National Security", *Asie Visions*, Ifri, October 2024.

25. "Taiwan Energy Security and Anti-Embargo Act of 2025", U.S. Congress, September 30, 2025, available at: www.congress.gov.

26. "Ricketts, Coons Introduce Taiwan Energy Security and Anti-Embargo Act", Office of Senator Pete Ricketts, September 5, 2025, available at: www.ricketts.senate.gov.

27. *Taiwan and American Space Assistance (TASA) Act of 2025*, U.S. Congress, September 4, 2025, available at: www.congress.gov.

28. "Hill Introduces Taiwan and American Space Assistance Act of 2025", U.S. House of Representatives (Office of Rep. French Hill), November 14, 2025, available at: <https://hill.house.gov>.

message that the U.S. would not tolerate China's aggressive actions toward Taiwan. The bill would ensure that China pays a significant economic and diplomatic cost for attempting to invade Taiwan.”²⁹

These initiatives have yet to be passed by both houses of Congress, but they show the legislative branch's continued and bipartisan commitment to deepen cooperation with Taiwan.

The American AI-driven tech industry depends on Taiwan-manufactured Chips supplies

An overlooked yet strategically significant dimensions of U.S.-Taiwan relations is the expanding tech-industrial cooperation—particularly in semiconductors, AI, and cloud infrastructures—which increasingly binds the two economies together. Trump has taken a tough approach to pressure Taiwan's chip-making world champion TSMC to produce in the U.S. TSMC made one of the largest foreign direct investments in the U.S. manufacturing history for a mega-factory in Arizona totaling \$65 billion, which began high-volume production of advanced 4 nm chips in late 2024. Amid Trump's return to the White House and the revived pressure on Taiwan, TSMC announced another large investment of \$100 billion in Arizona to expand its manufacturing capacity, covering three fabs, two advanced packaging plants, and an R&D center. According to the latest U.S.-Taiwan trade deal on January 15, 2026, Taiwan committed to US\$250 billion investment by Taiwanese companies in semiconductors, energy and artificial intelligence in the U.S., while the Taiwanese government will guarantee \$250 billion in credit for these companies.³⁰

Although the U.S. is successfully developing its high-end chip industry at home, thanks to TSMC notably, it is clear that the U.S. will not become self-reliant in semiconductor manufacturing in the medium term. American tech giants understand this very well and have been expanding their presence in Taiwan to take advantage of the innovation ecosystem and secure supply chains. NVIDIA, for example, a world-leading AI chip company, has received, in October 2025, approval from Taiwan's Ministry of Economic Affairs to establish a locally-incorporated subsidiary, a move that grants it independent legal standing, greater flexibility in local contracts and research financing, and a platform for

The U.S. will not
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manufacturing in the
medium term

29. S. Garcia, “US House Bill Warns China Off Taiwan”, *Taipei Times*, February 11, 2026, available at: www.taipeitimes.com.

30. L. Kif, “Taiwan Will Invest \$250 Billion in U.S. Chipmaking under New Trade Deal”, *CNBC*, January 15, 2026, available at: www.cnbc.com.

expanding R&D activities in the Taiwanese tech ecosystem.³¹ In addition, Google opened its largest non-U.S. AI hardware engineering center in Taipei on November 20, 2025, and continues to operate a major data center in Changhua, integrating Taiwan into its global AI and cloud architecture.³² Amazon Web Services (AWS), the world leader in cloud infrastructure, launched the Asia Pacific (Taipei) Region on June 5, 2025—a multi-billion-dollar, multi-year investment that embeds Taiwan within AWS’s global cloud network.³³

This deepening high-tech integration carries significant strategic implications. First, it reinforces U.S.-Taiwan technological interdependence by structurally linking core design and innovation capabilities of U.S. firms with Taiwan’s advanced manufacturing infrastructure and integrated semiconductor supply chains. As a result, the competitiveness of U.S. technology companies increasingly depends on the stability and performance of Taiwan’s industrial ecosystem. In effect, U.S. economic and technological competitiveness largely depends on Taiwan’s stability. Second, the scale of U.S. corporate investment in Taiwan creates strong incentives for Washington to maintain regional stability and sustain security assistance to Taiwan in order to protect investments and citizens in Taiwan.³⁴ At the same time, Taiwan’s semiconductor industry depends heavily on sustained demand, investment, and technology partnerships from U.S. firms to maintain its global competitiveness.

Conclusion

The uncertainty consubstantial with the Trump’s policies tends to reinstate strategic ambiguity in the U.S.-China-Taiwan triangle rather than indicating America’s abandonment of Taiwan. Although Donald Trump’s personal assessment of U.S. interests in Taiwan remains unclear, the first year of his second term does not indicate a shift in the U.S. policy toward Taiwan. Official statements and doctrinal documents emphasize the U.S. historical commitment against any change of the status quo by force, as well as Taiwan’s key location on the First Islands Chain to deter China, and Taiwan’s decisive role in tech supply chains. Hence, political and military cooperations remain on track; Congress continues pushing forward cooperation with Taiwan in various fields, including energy and space; and American tech giants are doubling down on Taiwan in order to foster their advantage in the global race to AI.

31. T. Charlotte, “Nvidia And TSMC to Collaborate on Silicon Photonics Technology,” *Data Center Dynamics*, January 20, 2025, available at: www.datacenterdynamics.com; “MOEA Approves Nvidia Taiwan Subsidiary,” *Taipei Times*, November 2025, available at: www.taipeitimes.com.

32. “We’re opening A New Hardware Engineering Hub in Taipei,” Google, November 20, 2025, available at: <https://blog.google>.

33. C. Daphne, L. William, “AWS Launches New Asia/Pacific (Taipei) Region Focused on Strengthening Digital Resilience and Industry Innovation”, *International Data Corporation (IDC)*, June 2025, available at: <https://my.idc.com>.

34. R. A. William, W. Jack, “Silicon Island: Assessing Taiwan’s Importance to U.S. Economic Growth and Security”, *Center for Strategic and International Studies (CSIS)*, January 10, 2025, available at: www.csis.org.

Amid uncertainty in U.S. foreign policy and erratic moves by President Trump, Taipei increasingly intends to diversify global partnerships in various fields, including with the European Union member states. In fact, Taiwan and Europe face common challenges in terms of economic and security dependence on the U.S. The European advocacy for strategic autonomy resonates in Taiwan, and both sides aim at diversifying beyond the U.S.³⁵ A notable example is TSMC's construction of a chip factory in Dresden, Germany (US\$10.6 billion), aiming for production by late 2027.³⁶ Moreover, TSMC established a European Union Design Center and AI R&D unit in Bavaria in September 2025.³⁷ Additionally, another Taiwanese tech giant, Foxconn, agreed in June 2025 to invest US\$278 million in France in partnership with defense firm Thales to establish an advanced semiconductor packaging joint venture, publicly welcomed by French President Emmanuel Macron.³⁸ These cooperations complement Taiwan's long-standing technological ties with the U.S. and reinforce international partnerships beyond the U.S.

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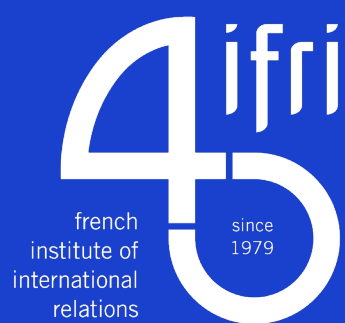
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35. *Strategic Autonomy and European Economic and Research Security*, European Commission, 2025, available at: <https://research-and-innovation.ec.europa.eu>.

36. C. Joseph, "What Europe's Politicians Hope for from a New Taiwanese Chip Plant in Germany", *Science Business*, August 22, 2024, available at: <https://sciencebusiness.net>.

37. "TSMC Partners with Technical University of Munich to Establish AI Chip R&D Center in Bavaria", *Trend Force*, September 2, 2025, available at: www.trendforce.com.

38. "French President Macron Thanks Hon Hai For Semiconductor Investment", *Taipei Times*, May 22, 2025, available at: www.taipeitimes.com.



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