

Domestic Politics and Hedging Behavior

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Abstract:

The project aims to investigate whether countries in East Asia are acting anomalously from traditional balancing and bandwagoning assumptions in the face of China's reemergence as a significant regional power. Previous studies have informed that domestic politics and foreign policies are closely intertwined, and a state's hedging behavior is heavily influenced by the roles of domestic factors, such as domestic politics and leaders' policy preferences. Using a two-level game analysis in this study provides a close linkage to the positions taken by the small states and middle powers powers in the region. We investigate three case studies, including South Korea, Taiwan, and the Philippines, and discover the patterns of their foreign policies. Even though these East Asian democracies have maintained close diplomatic allies with the US during the Cold War, they demonstrate somehow different prospects positions on hedging behavior.

Key words: Hedging, Foreign Policies, East Asia

1. Introduction

The secondary states conduct toward China differs from traditional perspectives of balancing and bandwagoning. Some scholars contended that hedging is a distinct strategic approach, alongside balancing and bandwagoning, and that it deserves considerably more comprehensive study. In the case of Asia-Pacific countries' strategies towards a rising China and existing US power, unless the dominant powers insist, the minor powers around the great powers have enough space to hedge without leaning to either side. Adopting a flexible position that is best described as "hedging" provides those states with more practical options.

Nonetheless, the relevant question, which has not yet been completely answered, is under which conditions do these states in the Asia-Pacific attempt to adopt a hedging strategy? What is driving their hedging behavior? Or more specifically, how can we identify the hedging countries when we study regional politics and international relations theory? Since hedging states in this area may have different causal effects, the study adopts a two-level game analysis this study provides a close linkage to the positions taken by the small states and middle powers powers in the region.

We investigate three case studies, including South Korea, Taiwan, and the Philippines, to discover the patterns of their hedging behavior. The three selected cases have demonstrated similarities in the hedging behavior. First, they received varying levels of security assistance from the US during the post-Cold War era. Taiwan, South Korea, and the Philippines have long been viewed as US security partners in the region and possess the values of democratic political systems inherited from the US. Meanwhile, these countries have experienced dramatic economic repercussions from interactions with China. They all view China as a precious trading partner and hardly resist the economic attractions in the bilateral interactions. Last but not least, the political leaders' preferences also play critical roles during the decision-making process, shaping each the states' hedging behavior. We will illustrate the relevant theoretical discussions in the next section by constructing a basic hedging model. By examining the mentioned three cases in the Asia-Pacific in the two-level game, we aim to elaborate a more specific and clear picture of the hedging strategy adopted by the Asia-Pacific countries.

2. Literature Review

Previous debates in the field of international relations have shown that the international society is not only a pure anarchic structure but also contains hierarchical institutions. Given the increased support from international relations scholars who criticized that the global system today is not simply unipolar, we can realize firmly that it is an increasingly globalized hegemonic system, in which the basic concepts of realism provide little guidance or understanding in explaining state behavior.” (Van Ness 2002) The current study of hierarchy is a well-developed branch of international relations theory. We cannot realize the phenomenon such as the United States Congress exists in the domestic arena if we define domestic politics as more hierarchical, or authoritative relationships like that between the United States and Germany or the United States and Japan exist in the international realm by the only concept neorealist provided, the international anarchy system. This could also be observed by the security hierarchy, in which country A exercises authority over B’s security actions. Some countries tend to surrender their security ability to a much stronger hegemon, such as the Persian Gulf and South Asia, the Federated States of Micronesia, and the Republic of Marshall Islands today.

Under the assumption of a hierarchic international society, some international relations scholars have increasingly begun to challenge the balancing hypothesis. Bandwagoning, not balancing, predominates in political realms whose structure is best described as a hierarchy. Randall Schweller has criticized some political scientists who have adopted a too narrow and biased selection of cases to explain the world filled with a balance of power. He believes that “the goal of bandwagoning is usually self-extension: to obtain values coveted.” (Schweller 1994) Balancing is an extremely costly activity that most states would rather not engage in, while bandwagoning rarely involves costs and is typically done in the expectation of gains. In a steep hierarchy, the international order through a combination of benefits and sanctions that the central power provides to the lesser powers could easily maintain a regular international status. The best strategy for a group of weaker states is to join the dominant power instead of trying to balance against it. Moreover, other scholars’ criticisms center on the balance of power theory.

The structure of anarchy and balance of power theory was designed to explain the Cold War, however, it may not explain why Asian states are not always balancing China in the same way that the United States balanced the Soviet Union. A general theory of international politics can not only be based on the great powers, but we also need to pay attention to the behavior of small nations since the nation-state is the unit of analysis adopted by Kenneth Waltz himself.

Therefore, the theory of international politics written according to European history faces insufficient explanatory capabilities for a significantly different region under study. We have to reexamine whether Europe's past necessarily be Asia's current and future.

Under the assumptions resulting from a hierarchic international society, scholars have increasingly begun to challenge the balancing hypothesis. Research has shown that the theory is “incorrect in its claim for the repetitiveness of strategy and the prevalence of balancing in international politics.”(Schweller 1994) Historically, bandwagoning is more common than balance of power. Scholars of this field have proposed that in a system of steep hierarchy, bandwagoning replaces the balance of power as the main strategy of small states (Kang 2007). The use of bandwagoning predominates in hierarchically ordered political realms where functional differentiation is low and influential resources are tightly concentrated in the hands of the dominant power. There are still open questions about bandwagoning, especially for minor powers surrounding the great powers. When studying these issues in the Asia-Pacific, the dichotomy of balancing and bandwagoning offers an overly simplified framework, and it cannot be applied to the description of security issues between China and its neighboring states.

More studies and policy publications have generally agreed on the strategy of hedging by the states towards a rising China. Hedging states in the Asia-Pacific seek to develop closer economic cooperation with China while still guarding their security and sovereignty, which causes them to lean toward the United States. The idea of hedging helps to change leaders' preferences and actions toward more peaceful inclinations. In fact, one of the existing definitions of hedging is a two-pronged approach, which simultaneously pursues two sets of mutually counteracting policies (“return-maximize” and “risk-contingency” options), representing an overall policy covering both bandwagoning and balancing (Kuik 2008). While hedging is a strategy that “works for the best and prepares for the worst,” (Schweller 1994) our article intends to review the extant literature on hedging in the international relations field, including the definitions, models, and the major causal effects on the states' hedging behavior.

As a strategy in international relations, hedging refers to a state's efforts to mitigate risk and maintain flexibility by pursuing multiple, often contradictory, policies and alignments. It is typically employed by the small/ middle powers (those not at the top of the international hierarchy) to navigate uncertain and volatile international environments without fully committing to any particular alignment or alliance.

Although researchers agree that hedging is a response to international uncertainty, the views on its definitions and underlying incentives are varied. Given the different definitions of hedging, scholars of international relations perceive hedging as a middle ground between balancing and bandwagoning (Kuik 2008). Hedging can be viewed as a strategy that incorporates the elements of balancing and bandwagoning as it involves maintaining relationships with multiple actors, including dominant and opposing powers, while avoiding complete alignment with any one side.

However, other scholars argue that hedging should be considered a distinct strategy, separate from balancing and bandwagoning. They view hedging as a way for small/ middle states to maintain autonomy and maneuverability by diversifying their relationships and avoiding overdependence on any single alliance or alignment (Lim and Cooper 2015, Wu 2019). From this perspective, hedging can be seen as a type of alliance strategy in itself, as states seek to strike a delicate balance between cooperation and competition with various actors.

One of the prominent definitions of hedging is “conceived as a multiple component strategy between the two ends of the balancing–bandwagoning spectrum” (Kang 2007, Kuik 2008). This typology stems from the risk strategies adopted by small/ middle states. Several scholars, including Le (2013), Kang (2007), and Kuik (2008), define strategic hedging as middle strategies along a spectrum, with balancing and bandwagoning occupying the opposite ends. Nonetheless, these existing definitions make the concept of hedging more complex and difficult to operationalize if we position the hedging behavior between the two powerful security strategies (balancing and bandwagoning) as relevant scholars have done before.

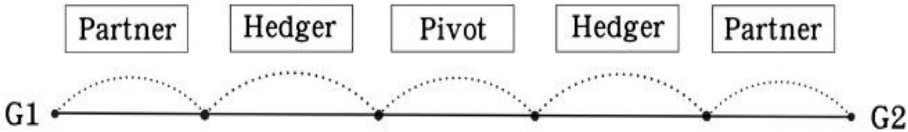
Lim and Cooper argue that hedging occurs when countries send ambiguous signals related to similar security interests with great powers to eschew the committed alignments with any great powers in the system (Lim and Cooper 2015, 709). Therefore, hedging represents the need for alignment assurance with the great powers in the international structure. In addition, discussions of hedging have major implications for a nation’s policy autonomy (Ciorciari 2009). Once countries send clear alignment signals to the great powers in exchange for security assistance, they may lose flexibility in implementing national policies in the future. In the context of power politics in the Asia Pacific, countries engaged in hedging behavior refuse the security benefits of aligning with either the United States or China to maintain the status quo, and they switch to the preservation of policy autonomy in the power competition between

Washington and Beijing (Kuik 2016, Lim and Cooper 2015). In this light, hedging is intended not to align with the United States or China (Kuik 2016). In short, the more security assurances minor powers can obtain from the United States, the less flexible countries are in determining their strategic policies.

3. Modeling the Concepts of Hedging

To prevent the issue of “concept stretching” (Collier and Mahon 1993) and to help researchers find quantifiable indicators, researchers of international relations must employ a more simplified explanation of this topic. Wu Yu-Shan defines hedging and pivot differently, arguing that pivot represents states’ policy of maintaining an equidistance between two great powers (Wu 2017). In the author’s description of the pivot role in romantic triangle relations, the country in the middle maintains an equidistance from the two powers and constantly swings or “pivots” to obtain the maximum benefit. It is a friend of the other two hostile states. A country adopting risk aversion does not want to take high risks and maintains contact with the two powers in the status quo. Any change to this status quo is rejected by the other party (Figure 1) (Wu 2017).

Figure 1: The Pivot and Hedger

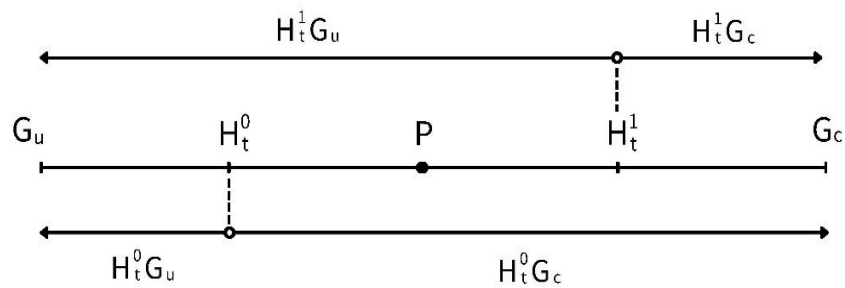


Nonetheless, in Wu’s definition, hedging, not pivot, should involve a more flexible position alongside the pivot role (Figure 1). Hedging means maintaining a certain distance

between great powers. Amid the competition between great powers, the hedging state that moves closer to a specific power must also uphold certain relationships with the other great powers and does not make commitments to either power (G_1 or G_2 in Figure 1). Thus, choosing to swing between the two great powers by not choosing sides in terms of security is the essence of hedging in Wu's studies.

Based on Wu's definitions of hedging and pivot, we establish a model to explore the concept and scope of hedging in the US-China-Taiwan triangle (Figure 2). As shown in Figure 2, G_u and G_c represent the two major powers, the United States and China respectively, and G'_u and G'_c respectively represent the risk coefficients they release for Taiwan. Facing G_u and G_c , Taiwan will have two different hedging nodes, namely H_t^0 and H_t^1 . Regarding H_t^0 , if the risk of G'_u is smaller, $H_t^0 G_u$ will be smaller, and $H_t^0 G_c$ will be larger. On the contrary, if the risk of G'_c is smaller, $H_t^1 G_c$ will be smaller and $H_t^1 G_u$ will be larger. Therefore, when the civil and military threats unleashed by mainland China become more obvious ($G'_c > G'_u$), Taiwan will move from H_t^1 to H_t^0 to avoid obvious risks.

Figure 2: The Model of Hedging and Pivot



G_u and G_c : US and China

H_t^0 and H_t^1 :

Source: graph by the authors

As far as we know, China has gradually increased its threat to Taiwan. However, there is no reason to believe that the U.S. will initiate military activities or attacks against Taiwan. However, if measured in terms of other security dimensions, the amount of security commitments released by Washington can also be regarded as a different risk to Taiwan. It is also important to keep in mind that there have been various degrees of the U.S. security commitment toward Taiwan, and the more commitment forwarded by Washington, the less “America skepticism” existed in Taiwanese society. On the contrary, weaker security assurance from Washington may raise more risks toward the civilian resilience in Taiwan.

As shown in Figure 2, if the U.S. security commitment to Taiwan is high, the relationship between Taiwan and the U.S. will become closer ($H_t^0 G_u$ and $H_t^1 G_u$ will decrease; H_t^0 and $H_t^1 \neq G_u$). At this time, the risk from mainland China will increase (that is, $H_t^0 G_c$ and $H_t^1 G_c$ will increase). The position also explains the basic trend displayed by Taiwan when adopting hedging, while it differs hedger from a pivot in the spectrum.

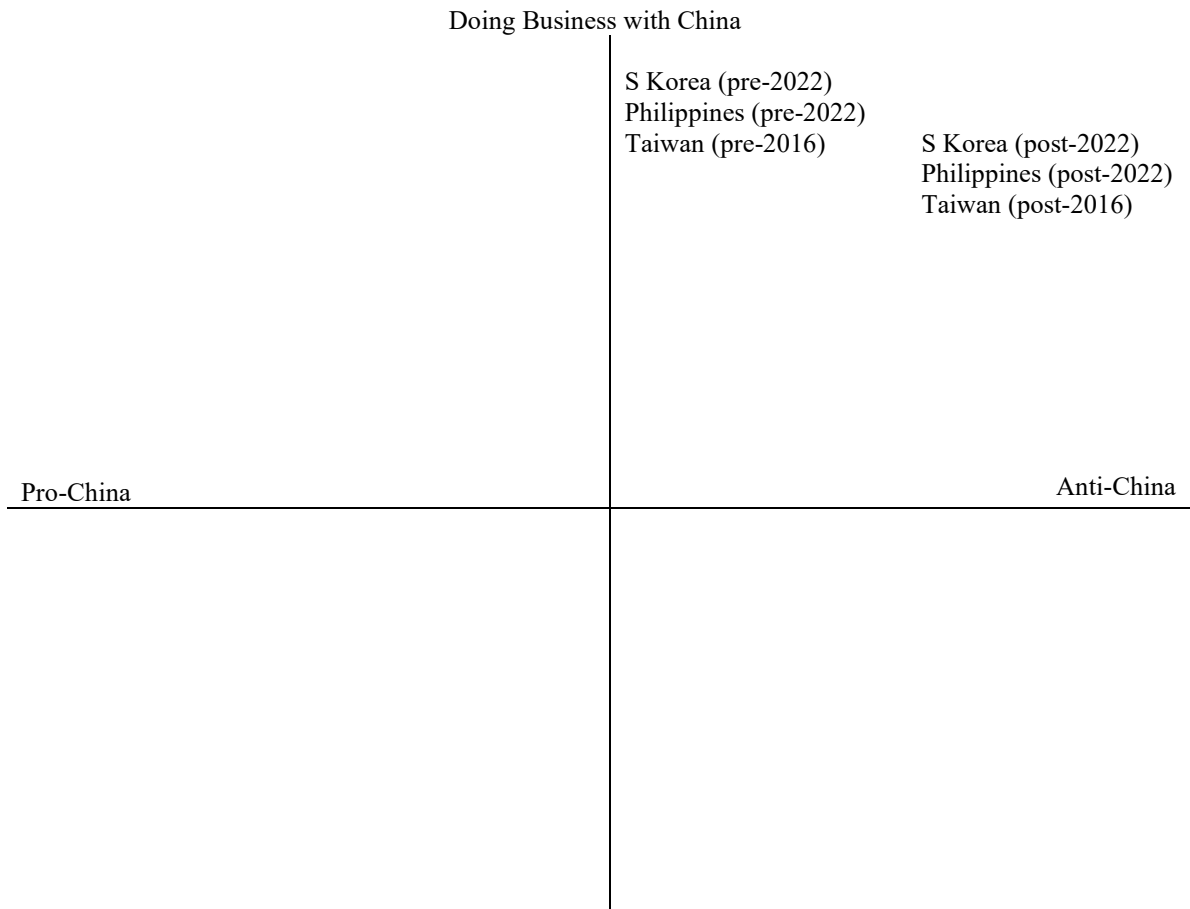
For example, the Chiang Kai-shek government has firmly proposed that “the ROC and PRC cannot coexist” even though it faced the suppression of mainland China in the international community. ROC’s national strength and external diplomatic assistance could still help the Kuomintang to compete against the PRC before the 1970s, and the role of Taiwan was relatively similar to the pivot (P) based on the traditional “Strategic Triangle Theory.” However, as China’s strength continues to grow, and Taiwan’s national strength gradually becomes incomparable, Taiwan can no longer play the role of a pivot in U.S.-China-Taiwan relations. Instead, Taiwan has switched from pivot (P) to the positions of H_t^1 or H_t^0 as shown in Figure 2. Faced with different risks or security commitments from the two major powers, Taiwan, as a hedger, should flexibly adjust its position alongside the spectrum. Adopting a more practical foreign policy, it provides domestic leaders with additional choices. Political leaders may prefer maintaining distance by swinging freely between China and the United States, but some others may choose sides.

4. Two-Level Games

Taiwan, South Korea, and the Philippines have all changed their positions toward the U.S. and China in recent years (see Figure 3). Taiwan during the Ma Ying-jeou years (2008-2016) tried to strike a balance between the U.S. and China by improving Taiwan’s relations with

China, in contrast to his predecessor Chen Shui-bian (2000-2008) and his successors, Tsai Ing-wen (2016-2024) and Lai Ching-te (2024-) who were more hostile to China. Likewise, the new presidents in South Korea and the Philippines, Yoon Suk Yeol (2022-) and Bongbong Marcos (2022-), shifted their predecessors' conciliatory approach toward China and moved to a more hostile stance. Evidently, national interests as an umbrella notion cannot capture the shift from one position to another given that the international environment did not alter drastically in a short period of time in all these cases. More likely, various leaders may interpret national interests very differently. And possibly, it is the domestic political dynamics that brings about the emergence of leaders with diverse worldviews, thus moving the country in a different direction. Thus, to trace the changing positions of these countries in regard to their relationships with the U.S. and China, it is critically important to take a closer look at the domestic scene. That is, we need to investigate the situation from a two-level game that involves a domestic and an international level.

Figure 3: Strategic Choices toward China since 2011*



Source: Adapted from (Hsieh and Wu 2024, 170)

*The year the Obama administration launched the Pivot to Asia policy

It should be noted that all these countries are now democratic, so there are elections every now and then. In democracies, there are various political forces competing against each other in elections which may result in a turnover of power from one political party to another. These parties may be different from each other on a variety of issues—class, religion, environmentalism, national identity, regionalism, and so forth (Lipset 1967, Lijphart 1999 and 2012). In most cases, foreign policy has rarely been a major issue in elections. Thus, a party's nominee may win the election on the basis of a number of domestic issues, but as he/she comes to power, he/she may bring with him/her different ideas about how to deal with other countries. The changing international posture may thus be seen as a byproduct of the electoral process rather than a major issue that dominates election campaigning.

However, there is one important problem when we try to include the domestic level in our analysis. In contrast to the international level where there is essentially only one international structure, at the domestic level, we are dealing with a variety of settings in different countries: in one country, unemployment may be the most salient issue in an election; in another, it is law and order; and so forth, rendering generalization difficult.

Take the case of Taiwan as an example. The independence-unification issue, the issue about the political association between Taiwan and mainland China, has long been a dominant issue shaping Taiwan's electoral politics (Lin, Chu, and Hinich 1996, Hsieh and Niou 1996a, b). Since the independence-unification issue is closely tied to Taiwan's relations with China—and by extension, with the U.S., too—it is directly linked to Taiwan's strategic choice between the U.S. and China. So, elections have direct consequences.

Yet, the situations in South Korea and the Philippines were different. China may be a factor in the background, but other issues loom a lot larger in elections. In the 2016 presidential election in the Philippines, for instance, Rodrigo Duterte himself “credited his success to his tough stance on law and order.”¹ However, it turns out that his attitude toward China was more conciliatory, diverging from many other politicians in the country. Duterte clearly did not see

¹ Please see <https://www.bbc.com/news/world-asia-36253612>

China as a direct security threat, and his move was dictated mostly by the economic logic.

For South Koreans, the major security concern has been North Korea, and since China has been the major supporter of the North, the China factor has undoubtedly stayed in the background. Nonetheless, various South Korean presidents have shown different attitudes toward the North—some more conciliatory than others—thus seeing China in different lights. The new president, Yoon Suk Yeol, was elected in 2022 by a very slim margin—less than three quarters of a percentage point. He is one of the most pro-U.S. presidents in years. The major issues in that election were economic and the government’s responses to the pandemic, not to mention the rampant negative campaigning. If Lee Jae-myung, the nominee of the previous governing party, were elected, it could be expected that South Korea’s strategic choice might not be very different from the outgoing administration.

Thus, to explain the strategic choices of those countries solely on the basis of the international structure may miss a critical link. The changing domestic political dynamics should be included for us to get a clearer picture of what happens on the ground. We will now turn to our three main cases.

5. Case Studies

Taiwan

As a secondary state, Taiwan cannot afford to antagonize China, but there has been a strong sentiment among quite a few Taiwanese that Taiwan should be separated from mainland China politically—or even economically if feasible. In this context, there has been a tug of war between pro-China and anti-China forces, and in general, no matter whether one is pro-China or anti-China, it is likely that he/she may still be in favor of close ties with the U.S.—after all, it is the extended deterrence offered by the U.S. that provides peace and stability across the Taiwan Strait. If pro-U.S./anti-China stance is referred to as balancing, then making friends with both is, by definition, hedging (Wang and Tan 2021, Hsieh and Lin 2023).

To be sure, the U.S. has been a vital strategic partner for Taiwan since at least the Korean War. It was the outbreak of the Korean War that alerted the Truman administration of the expansion of the Communist bloc in the region. Taiwan was thus included in the U.S. security perimeter to contain the expansion of the Communist bloc. In that context, the U.S. signed a mutual defense treaty with Taiwan in 1954, which took effect a few months later. On January 1,

1979, the U.S. shifted its formal diplomatic recognition from the Republic of China (ROC) on Taiwan to the People's Republic of China (PRC) on the mainland, and the mutual defense treaty was abrogated later in the year. At this juncture, the U.S. Congress passed the Taiwan Relations Act in April 1979 to lay the foundation for the continuation of the U.S. commitment to Taiwan's security. Washington's security commitment has continuously played a significant role in the U.S.–China–Taiwan triangular composition (Wu and Hsieh 2016). During the second Taiwan Strait crisis in 1995–1996, for instance, China fired two missiles targeting an area less than 100 miles from Taiwan's coast and mustered a large number of troops in Fujian Province across the Taiwan Strait. The Clinton administration sent naval forces to patrol the area to deescalate the conflict. This move shows that Washington was able to send a less antagonizing signal to calm down the situation without directly providing Taiwan with military and financial support. Washington's strategic decision also provided a clear sign to the Taiwanese leaders not to initiate any serious attempt to change the status quo.

Taiwanese leaders were divided on how to treat China. Generally, the Democratic Progressive Party (DPP), the current governing party is less sanguine about China and is often seen as taking an anti-China stance while the Kuomintang (Nationalist Party or KMT), the old ruling party, is more moderate toward China and has, from time to time, been accused of being too weak vis-à-vis China. In essence, the DPP leans more toward the balancing side while the KMT is more on the hedging side (Wu 2016).

Figure 3 shows the relative positions of the two parties. When KMT's Ma Ying-jeou was elected president in 2008 and 2012, he took a bona fide hedging strategy toward the U.S. and China with friendly gestures toward both big powers. During his term in office, he pushed for direct transport links between Taiwan and the mainland, and in 2015, he met with China's leader Xi Jinping in Singapore. However, when the DPP is in power, either before or after Ma, the DPP government's stance leans more toward the U.S. and is more hostile to China not only politically but also economically by encouraging Taiwanese businesses to divest from China to Southeast Asia and elsewhere. In response, China also takes some countermeasures to “punish” Taiwan (e.g., to establish formal diplomatic ties with those countries that had recognized the ROC).

In sum, Taiwan's strategic choice between the U.S. and Taiwan depends, to a large extent, on the domestic political dynamics. If the KMT is in power, the policy choice will more likely be hedging while if the DPP is in the governing position, it will lean more toward

balancing.

South Korea

Korea was colonized by Japan from 1910 to 1945. After the end of the Second World War, Korea was controlled by the Soviet Union in the north and the U.S. in the south, followed by the establishment of two separate governments in 1948. In 1950, North Korea attacked the south in an attempt to unify the Korean Peninsula but failed. Eventually, the two Koreas coexist on the Peninsula, separated roughly at the 38th parallel.

From the beginning, South Korea was closely allied with the U.S. The two countries signed a mutual defense treaty in 1953, which took effect the following year, and have maintained close ties ever since.

Politically, South Korea has experienced some upheavals over the years. The First Republic (1948 -1960) deteriorated from relatively democratic rule to authoritarian rule in the end. The Second Republic from 1960 to 1963 saw a brief democratic experiment, which was overthrown by a military coup in 1961, ushering in the Third Republic of 1963-1972, the Fourth Republic of 1972-1981, and the Fifth Republic of 1981-1988 under the leadership of military strongmen. Finally, the Sixth Republic was established in 1988, bringing about democratic transition in South Korea.

Democratic South Korea continues to maintain close ties with the U.S. At the same time, it has also improved its relations with China. The two countries established formal diplomatic ties in 1992. Trade and investment have increased significantly over the years. China is now South Korea's top trading partner.

With regard to the relationship between South Korea and the U.S., there have occasionally been some difficulties, especially in how to face the threat posed by North Korea. Some presidents, particularly those from the progressive side of the South Korean political spectrum—Kim Dae-jung, Roh Moo-hyun, and Moon Jae-in—sought to engage North Korea in the name of the Sunshine Policy, which, as can be expected, also affected the country's policy toward China since China has been North Korea's the main supporter (Maduz 2023). From time to time, there has also been a certain degree of anti-American sentiments in South Korea, further straining U.S.-South Korea relations.

Thus, we see the pendulum swinging back and forth in South Korea's strategic choice

between hedging and balancing. The shifts were caused essentially by electoral politics with different issues that might pop up during election campaigning. More often than not, these issues were not directly related to the China factor. This is a bona fide two-level game situation.

The Philippines

The Philippines gained independence in 1946 after being colonized by the U.S. from 1898. Since independence, the Philippines has continued to maintain close ties with the U.S. In 1951, the two countries signed a mutual defense treaty, placing the Philippines at the forefront of the U.S. fight against the expansion of the Soviet bloc. During President Rodrigo Duterte's term in office, the Philippine government ordered to review the mutual defense treaty, but later changed its decision.

The Philippines had established democratic rule since independence. However, it was interrupted by Ferdinand Marcos' authoritarian rule from 1972 to 1986. He was brought down by the People Power Revolution of 1986, and the Philippines finally returned to democratic rule.

Given the long-standing U.S.-Philippines relationship, the Philippines' foreign policy has tilted toward the U.S. most of the time. Yet, it has also maintained relatively cordial relations with China, particularly on the economic front in recent decades. However, occasionally, the U.S.-Philippines relations turned sour, most evidently during Duterte's term in office, dubbed Duterte's China pivot by Shambaugh (2021). As noted earlier, he won the presidential race on the issue of law and order, but his heavy-handed way of tackling the issue drew a lot of criticism from the international community, including the U.S. government. Duterte turned to China. He not only sought China's help in the Philippines' economic development but also downplayed the territorial disputes between the Philippines and China over some shoals in the South China Sea. However, after Bongbong Marcos, Ferdinand Marcos' son, won the election in 2022, the Philippines' foreign policy shifted from Duterte's hedging approach back to an unequivocally balancing strategy vis-à-vis China. The tensions in the South China Sea have heightened significantly in the past couple of years. Again, the case shows the international strategic postures may be conditioned by domestic political dynamics.

6. Conclusion

The small states and middle powers may not adopt a balancing or bandwagoning strategy

all the time. If they can choose, hedging has become an alternative policy option for the states in the region. The study has attempted to solve the major conceptual question by constructing a hedging and pivot model, differentiating the two concepts. We also examine the three regional actors in Asia-Pacific through a two-level game, elaborating on the root causes of the secondary states' hedging behavior. While most scholars pay attention to state or systemic levels of causes, we aim to discover another nuance that changing domestic political dynamics may urge small states and middle powers to hedge.

Taiwan, South Korea, and the Philippines share some similarities. They have all been U.S. allies—Taiwan has maintained close military ties with the U.S. even after the U.S.-ROC Military Defense Treaty was terminated in 1979—and maintained democratic rule since at least the late 1980s (or even earlier). What occurred in all these cases is that elections might bring about “surprises” that changed these countries' strategic choices between the U.S. and China, rendering the application of the logic of realism dubious in accounting for the international interactions involving small states and middle powers.

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