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When did the ROC abandon “Retaking the Mainland”? The transformation of military strategy in Taiwan

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ABSTRACT

The question of when the government of the Republic of China abandoned “Retaking the Mainland” has not been clearly answered in previous studies. In this article, I attempt to address this by reexamining the transformation of Taiwan’s military strategy. I focus on the preparations for the “Retaking the Mainland” operation, which have been studied extensively, and the efforts to increase defensive capabilities as part of the “Taiwan Defense” operation, which has lesser scholarship. With respect to this period of transformation of Taiwan’s military strategy, a now broadly accepted interpretation was laid out in the 2006 National Defense Report. However, a different perspective was outlined in a 2013 book jointly compiled by Taiwan’s Ministry of National Defense and Academia Historica. The result is that, with respect to the historical shift in military strategy, the official view of the Ministry of National Defense has become somewhat ambiguous. In this article, I advance an alternative view on this period by highlighting two points at which new policies were adopted. There was a move from a strategy of “Offensive Posture” that had been in place since 1949 to a strategy of “Unity of the Offensive and Defensive,” in the Spring of 1969. Subsequently, after the establishment of the “Guidelines for National Unification” in 1991, there was another shift, to a strategy of “Defensive Posture.” As I suggest, the ROC government abandoned the concept of using military force to “Retake the Mainland” in 1991, when it moved to a strategy of “Defensive Posture.”

KEYWORDS

Republic of China; Taiwan; retaking the mainland; Chiang Kai-shek; Chiang Ching-kuo

1 Introduction

Some scholars have suggested that the Republic of China’s (ROC’s) initial policy toward the Chinese mainland was not proposed on the basis of military necessity. According to this view, while Chiang Kai-shek may have been sincere in his desire to retake the mainland, the fact that no serious counter-offensive operations were set in motion suggests another interpretation: that “Retaking the Mainland” was a slogan that Chiang Kai-shek deemed politically necessary to justify his autocratic rule¹. It has also been pointed out that the day of the abolition in July 1972 of the Kuo-kuang Operation Office – a central organization for counter-offensive operations – was also the last day

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¹.Dai, *Taiwan Sengo Kokusai Seiji-shi*, 150.

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that Chiang Kai-shek wrote in his diary. The observation made here is that once Chiang Kai-shek had for practical purposes ceased to be politically active, the policy of retaking the mainland also began to end².

How was “Retaking the Mainland” defined in terms of military strategy as the basis for guiding military power, military policy and military activities? According to the document “Military Strategy Development” by the Ministry of National Defense (MND), in the *2006 ROC National Defense Report* (NDR2006), the stage of “Offensive Posture” began in 1949 when the armed forces migrated to Taiwan with the central government. Later, when the People’s Republic of China (PRC) succeeded to the ROC’s membership of the United Nations in 1971, the ROC Armed Forces adjusted its military strategy from “Offensive Posture” to “Unity of the Offensive and Defensive,” based on the changing political environment in the Taiwan Strait. Then, in January 1979, the United States changed its diplomatic recognition from Taipei to Beijing; in response, the ROC Armed Forces adjusted its military strategy once again, this time to a “Defensive Posture.”³ This interpretation raises a number of questions. Did the switch from “Offensive Posture” to a “Unity of the Offensive and Defensive” in 1971 mean that the “Retaking the Mainland” policy had been given up? Or was it abandoned with the switch to “Defensive Posture” in 1979, with the normalization of US–PRC relations?

Until now, research concerning Taiwanese military affairs has tended to proceed on the basis of the above view. Yet, as it happens, an alternative interpretation was offered in 2013, when, under the Chinese Nationalist Party (KMT) government, Academia Historica and the Military History Compilation and Translation Office of MND jointly compiled a *National Defense History* (NDH2013). In this work we find the following claim: “In 1979 the ROC’s Military Strategy shifted from creating an opportunity to ‘Retake the Mainland’ to pursuing a ‘Unity of the Offensive and Defensive.’ Then, in 1991, it shifted once again, to the adoption of a ‘Defensive Posture.’⁴ Thus, we can identify a difference in how this period is interpreted. On the one hand, we have a NDR2006 account, which was given during the Democratic Progressive Party (DPP) government. On the other hand, we have the NDH2013 account, which was given during a KMT government⁵. The particular points of difference in the accounts relate to the dates on which the two transformations in policy occurred. While in NDR2006 the shift from an “Offensive Posture” to a “Unity of the Offensive and Defensive” is claimed to have taken place in 1971, the claim made in NDH2013 is that this took place in 1979. Similarly, while NDR2006 states that the shift from a “Unity of the Offensive and Defensive” to a “Defensive Posture” occurred in 1979, in NDH2013, the year is said to be 1991. As a result of these differing opinions, the official ROC interpretation of the period has become somewhat ambiguous.

In response to these conflicting views, this article offers an alternative understanding. My thesis, which I seek to substantiate below, is that the ROC did not move away from its strategy of the “Unity of the Offensive and Defensive” during the Chiang Ching-kuo era

².Matsuda, “Syo Kaiseki to ‘Tairiku-Hanko,’” 356–7.

³.National Defense Report Editing Council, Ministry of National Defense, *2006 ROC National Defense Report, the Republic of China*, Taipei: Ministry of National Defense ROC, 98–9.

⁴.Sun, *Taiwan Quanzhi Juan Liu*, 15–34.

⁵.Ch’en, Liang-Chun (Lieutenant General of the ROC Army Reserve), interview by author, Taipei, March 9 2015. Ch’en said: “The military strategy during the Chiang Ching-kuo era was Unity of the Offensive and Defensive and did not have the understanding of the NDR 2006.”

(1972–1988); rather, it continued in its commitment to the concept of “Retaking the Mainland” using military force. My aim is to defend this new interpretation, which is in alignment with the ascertainable facts. To this end, I pay particular attention to the military’s state of preparation for counter-offensive operations, as well as to the efforts made to improve defensive capabilities as part of the Taiwan-Penghu defense operations.

2 The limits of the “Offensive Posture” strategy and the shift to the “Unity of the Offensive and Defensive” strategy

2.1 The PRC’s Great Leap Forward and the ROC’s operational plan of “Retaking the Mainland”

In the 1960s, mainland China was thrown into chaos as a result of the failure of the PRC’s “Great Leap Forward.”⁶ Chiang Kai-shek viewed this chaos as an opportunity, judging that the time was ripe for “Retaking the Mainland.” On April 1 1961, Chiang Kai-shek established the Kuo-kuang Operation Office at the MND, and ordered the creation of “Project Kuo-kuang” as a general plan for retaking the mainland⁷. However, the ROC Armed Forces at that time were woefully underprepared. Not only did they lack enough planes to launch a direct assault on the mainland, they also lacked sufficient capacity to transport their armed forces. Without transportation support from the United States military, it was impossible for Taiwan to launch large-scale counter-offensive operations⁸. The ROC therefore sounded out the Kennedy administration on the possibility of receiving support for retaking the mainland. The United States, however, was wary of getting embroiled in such a conflict and refused⁹. In the end, the ROC was left with no alternative but to continue with small-scale counter-offensive operations¹⁰.

Following these setbacks, Chiang Kai-shek tried a new operation plan. At that time, the Vietnam War was not progressing as the United States had hoped. On the pretext of lending assistance, Chiang Kai-shek sought to land ROC Armed Forces on the coast of Guangdong province¹¹. For this purpose, he sent Chiang Ching-kuo to the United States in September 1965 to suggest the plan to the Johnson administration. Lyndon Johnson, however, remained unresponsive. He had already been considering ways to end the conflict in Vietnam and wished to avoid an all-out war in the Far East¹². Without Johnson’s support, the plan to “Retake the Mainland” went back to square one.

⁶The Great Leap Forward was a five-year plan of forced agricultural collectivization and rural industrialization that was instituted by the Communist Party of China in 1958, which resulted in a sharp contraction in the Chinese economy and between 30 to 55 million deaths by starvation, execution, torture, forced labor, and suicide out of desperation.

⁷Zhonghua Minguo Jianguo 100-nian Junshi-shi Bianzuan Xiaozu, *Zhonghua Minguo 100-nian Junzhi-shi*, Chapter 6, 17; Lieutenant General Chu Yuan-ts’ung interviewed by P’eng, *Chen Feng de Zuozhan Jihua*, 11–2.

⁸Hiramatsu, *Taiwan Mondai*, 102–3.

⁹Ishikawa, “Kokufu no ‘Tairiku-Hanko’ to Kennedy Seiken no Taio,” 12–8.

¹⁰“Chinese Nationalist Maritime Activities Against the China Mainland” (Memorandum), November 5 1962, *Digital National Security Archive*. <<http://nsarchive.chadwyck.com/nsa/>>, Item number CI01526. Hereafter, the *Digital National Security Archive* will be referred to as DNSA.

¹¹“Zongtong yu Wushisi-nian Ba-yue San-ri Jiejian Meiguo Haijun fuzhu Tongxun Zhongxin Zhuren TanhuaJiyao” [President received the Director of the US Naval Auxiliary Communications Center on August 3 2005], *President Chiang Ching-kuo Archives*, Taipei: Academia Historica, 005–010100-00072-006; “Ray Cline’s Talks with Chiang Kai-shek” (Memorandum), August 5 1965, *Foreign Relations of the United States, 1964–1968*, Vol. XXX, China. <<https://history.state.gov/historicaldocuments/frus1964-68v30/>>, Document 95. Hereafter, the *Chiang Ching-kuo Archives* will be referred to as CCKA and *Foreign Relations of the United States* as FRUS.

2.2 The PRC's Cultural Revolution and the ROC's operational plan of "Retaking the Mainland"

In May 1966, the PRC conducted its third nuclear bomb test. Commenting on this event in his diary, Chiang Ching-kuo noted that "Retaking the Mainland" was becoming an increasingly difficult proposition¹³. One week after the third nuclear test, the Cultural Revolution¹⁴ began. In Chiang Kai-shek's view, it was possible that a developing anti-Mao movement amongst the intelligentsia of Chinese society might bolster the ROC's cause¹⁵. He initiated a reexamination of counter-offensive plans¹⁶.

In 1967, Chiang Kai-shek observed that not only was a power struggle unfolding within the CPC, but fractures were also appearing within the mainland military and the general public. Believing that this instability would continue into the future, he concluded that it was an opportune time for launching the plan to retake the mainland¹⁷. Chiang Kai-shek hoped to secure the approval of the United States government, along with military assistance, but the Johnson administration promptly refused¹⁸. This would be the last time that the ROC sought aid from the US government in "Retaking the Mainland."¹⁹

The ROC would subsequently continue to assert that the time was ripe to retake the mainland. In the meantime, a plan for a fresh national strategy was shared within the newly established National Security Council (NSC). The plan called for an alternative approach to counter-offensive operations. Rather than the ROC attempting a direct invasion by itself or relying on the United States for support, the focus would be on having Special Operation Forces infiltrate regions in the mainland where civil unrest seemed likely. Their aim would be to help incite uprisings against the CPC, taking advantage of any opportunities to set the counter-offensive operations in motion. The argument was that this strategy would have the highest chance of succeeding²⁰. It was in this context that the ROC Armed Forces began to deliberate upon its "Wang-shih" operation plan, which was to be based upon the above strategy²¹. However, Chiang Kai-

¹²."Call on the Secretary of Defense by the Chinese Minister of Defense" (Memorandum), September 22 1965, *FRUS, 1964-1968*, Document 104; Memorandum, September 23 1965, *FRUS, 1964-1968*, Document 106.

¹³.Hoover Institution Archives, Stanford University, *Chiang Chin-kuo Diaries*, diary entry for May 13 1966. Hereafter, the *Chiang Chin-kuo Diaries* will be referred to as *CCKD*.

¹⁴.Though formally launched at the Eleventh Plenum of the Eighth Central Committee in August 1966, the Cultural Revolution actually had been declared months earlier, on May 16, and had been under way since then, with an initial focus on educational institutions. In the beginning, Mao pursued his goals through the Red Guards, groups of urban youths formed through mass mobilization efforts. They were directed to root out those among the country's population who were not "sufficiently revolutionary" and those suspected of being "bourgeois." The Red Guards experienced little oversight, and their actions led to anarchy and terror, as "suspect" individuals – traditionalists, educators, and intellectuals, for example – were persecuted and killed. The Red Guards were soon reined in by officials, although the brutality of the revolution continued.

¹⁵."Zongcai Zhishi" [Chairman's orders], *Records of the 218th Meeting of the Standing Committee of the 9th Central Committee of the KMT*, June 15 1966, Taipei: KMT Party History Institute, Hui 9.3/218.

¹⁶."Ziji Benyue Fansheng-lu" [Self-reflection of the month], Lu, ed. *Jiang Zhong-zheng Xiansheng Nianpu Changbian*, 302-4. Hereafter, *Jiang Zhong-zheng Xiansheng Nianpu Changbian* will be referred to as *JZZXNC*.

¹⁷."Ziji Benyue Fansheng-lu" [Self-reflection of the month], February 28 1967, Lu, *JZZXNC*, 388-92.

¹⁸.Telegram, March 16 1967, *FRUS, 1964-1968*, Document 249; "Tingqu Makangwei youguan Meiguo Renzao-weixing dui Dalu Zhaoxiang zhi Baogao ji Zhaosen Zongtong dui Wo Fangong Shiji zhi Dafu" [Listening to McConaughy's report on the US satellite photos of the mainland and President Johnson's reply on the timing of our counterattack], February 28 1967, Lu, *JZZXNC*, 395-6.

¹⁹.Matsuda, "Syō Kaiseki to 'Tairiku-Hanko,'" 353.

²⁰."Yanxi Guojia Anquan Huiyi Jihua Weiyuan-hui Bian Woguo Wei Fangong Fuguo zhi Guojia Qingshi Yanpang yu Guojia Zhanlue Kaoan" [The National Security Council Planning Committee has prepared a study on the national situation and national strategy for the restoration of the country by counter-attack], May 1 1967, *CCKA*, 005-010206-00018-007.

²¹.Military History Compilation and Translation Bureau (MHCTB), *Guomin Geming Jianjun-shi Book 4*, 1803-4.

shek had not given up on large-scale counter-offensive operations; this is clear from the fact that he sought to secure tank-landing ships and armored cars from Japan, so that the ROC could be ready to send in the main body of its armed forces in the event of the success of the “Wang-shih” operation²².

As it happened, the need to reconsider its military preparedness was forced upon the ROC by the United States. The United States announced that it was planning to abolish its Military Assistance Program (MAP) for the ROC, replacing it with the Foreign Military Sales (FMS) system²³. In a military council held a few days after this announcement, Chiang Ching-kuo displayed an awareness that the present time was by no means suitable for counter-offensive operations. In his view, “Retaking the Mainland” would become a real possibility when three conditions were met: First, a “Hungary-style revolution” needed to occur; second, a large enough anti-communist force had to arise in the mainland to allow the ROC forces to act as one part of a pincer-like assault; third, international circumstances needed to change significantly²⁴.

While Chiang Kai-shek believed that the Cultural Revolution represented an opportune time to retake the mainland, the necessary condition of an anti-communist revolution did not occur. Furthermore, there were also no changes in the necessity of support from the United States. This meant that the ROC had to bide its time. It would need to draw upon as much support as possible from the United States in order to gradually increase its military preparedness and guide the situation on the mainland toward an instability that would be greater than what the CPC could contain. The final aim would be to exploit that instability for a real assault.

2.3 The strategic shift from an “Offensive Posture” to the “Unity of the Offensive and Defensive”

On February 6 1969, Chiang Ching-kuo spoke at an extended monthly meeting of the MND. He emphasized that the government’s policy had already shifted toward a “political counter-offensive”²⁵ and indirectly criticized the fact that many officers and soldiers were still anticipating the occurrence of large-scale counter-offensive operations.

On March 29, a new “Chinese Nationalist Party Platform Policy” was adopted at the 10th National Congress of the KMT. According to this platform, the party was to carry out two primary tasks moving forward. First, the economy of Taiwan was to be developed under the slogan of the “Construction of a Restoration Base.” Second, a political counter-offensive was to be pursued, rather than a military one, under the slogan “Retake the Mainland.”²⁶ Following these developments, the 19th meeting of the NSC was held at the end of May. At this meeting, the council approved a new Military Strategy Conception, which had been deliberated upon in accordance with the new national strategy²⁷. The

²² “Zishi Jiang Jing-guo Dingzhi Riben Zhuangjia Yunshu-che” [Instructed Chiang Ching-kuo to order Japanese Armored Personnel Carriers], Lu, *JZZXNC*, 427.

²³ Telegram, December 5 1967, *FRUS, 1964–1968*, Document 290.

²⁴ “Jinhou Yingyou Xinde Guannian Zuoxin de Nuli” [From now on, we should have a new vision and make new efforts], in *Jiang Zongtong Jing-guo Xiansheng’s Vol.7*, edited by JYZHW, 27–8.

²⁵ “Jianli Women Ziji de Junshi Sixiang” [Building our own military mind-set], in *Jiang Zongtong Jing-guo Xiansheng’s Vol.7*, edited by JYZHW, 291.

²⁶ “Quenhui Zuo Taolun Tongguo Zhenggang-an Queding Jidi Jianshe Fangzhen Bawo Shiji Shishi Fanggong” [The plenary session yesterday discussed and passed the platform to determine the direction of the base construction and to seize the opportunity to make a counterattack], *Zhongyang Ribao*, April 6 1969.

ROC thereby shifted from an “Offensive Posture” strategy, which it had pursued since 1949, to a new strategy that would match the “two-pillar” party platform. This new strategy was known as the “Unity of the Offensive and Defensive.” It maintained an “offensive” aspect, with the retention of the goal of “Retaking the Mainland,” while adding a “defensive” aspect, with the establishment of the goal of “Constructing a Restoration Base.”

After this transformation in military strategy, the ROC Armed Forces adopted the slogan “Consolidate a Restoration Base and Create Opportunities for Retaking the Mainland.” In line with this slogan, they began to draw up the “Ku-an” operation plan, whereby the ROC would single-handedly protect Taiwan while preparing for an opportune time to shift toward an offensive footing²⁸. Given the anticipated drop in support from the MAP program going forward, it was understood that Taiwan’s economic base needed to be strengthened sufficiently to build enough military power to retake the mainland. In the meantime, given the lack of such power, it would be necessary to effectively deploy a “political counter-offensive”; that is, psychological warfare and propaganda, with the aim of encouraging an anti-communist uprising that would bring the CPC to the verge of collapse. This would then open up the path for an actual “military counter-offensive.”

After the ROC shifted to the “Unity of the Offensive and Defensive,” it proceeded to pay more attention than before to the military capabilities of the Taiwan-Penghu defense operations. Yet, at the same time, it continued to prepare for an eventual “Retaking of the Mainland.”

3 The transfer of political power from Chiang Kai-shek to Chiang Ching-kuo

3.1 The Guam doctrine

On July 1 1969, Chiang Ching-kuo assumed the position of Vice Premier. However, he continued to attend the military council after his retirement from the MND. He also continued to play an important role in national security affairs as chief of the NSC National Mobilization Committee²⁹. When Chiang Kai-shek’s physical condition deteriorated following a road accident on September 16, the authority for determining the ROC policy began to shift to Chiang Ching-kuo³⁰.

Meanwhile, the situation in the United States was also changing. As ground troops began to withdraw from Vietnam, President Richard Nixon made his first foreign trip since assuming the presidency. Arriving in Guam in July, he announced the so-called “Guam Doctrine,” where he proposed that the nations of Asia would need to take greater responsibility for their own defense³¹. On September 23, the US State Department

²⁷ “Guojia Anquan Huiyi Di Shijiu-ci Huiyi Yicheng” [Agenda of the 19th National Security Council Meeting], May 28 1969, CCKA, 005–010206-00032-001; “Guojia Anquan Huiyi Di Shijiu-ci Huiyi Yishilu” [Proceedings of the 19th Meeting of the National Security Council], May 28 1969, CCKA, 005–010206-00033-002.

²⁸ MHCTB, *MND Yearbook 1969*, 101, 184.

²⁹ Kotani, *Syo Keikoku Den*, 260–6; Huang, Shih-chung (Lieutenant General of the ROC Army Reserve), interview by author, Taoyuan, October 22 2019. Huang said: “Chiang Ching-kuo, as the President Chiang Kai-shek’s successor, participated in all meetings, including economy, security, etc.”

³⁰ Matsuda, “Syo Kaiseki to Tairiku-Hanko,” 353.

³¹ Informal Remarks, July 25 1969, University of California, Santa Barbara, The American Presidency Project (UCAPP). <https://www.presidency.ucsb.edu/documents>.

conveyed to its ambassadors and envoys stationed in China that following a reduction in naval vessels and a decrease in the overall defense budget, the Seventh Fleet's patrol of the Taiwan Strait would be suspended³². In response, the ROC protested that this suspension would enhance the PRC's ability to pressurize isolated islands³³. However, the United States government did not budge, and on December 24 it announced that the regular patrols of the Seventh Fleet would be replaced with irregular patrols³⁴.

When the then Vice President of United States, Spiro Agnew, visited Taiwan in early January 1970, Chiang Kai-shek took the opportunity to outline his own perspective on the Guam Doctrine. He emphasized that while "Retaking the Mainland" had been the ROC's principle goal in the past, currently their pressing concern had changed to the question of "how we are to protect ourselves."³⁵ Moreover, Chiang Ching-kuo sought to secure a commitment from Agnew that the removal of regular patrols by the Seventh Fleet would be made up for with an increase in air power. However, he was unable to convince the United States to alter its stance³⁶. After Agnew left Taiwan, Chiang Ching-kuo gathered the senior leaders of the ROC Armed Forces, outlining the strategic course for the time being, and asserting his view about initiating counter-offensive operations when the time was ripe. Yet, despite these comments, over the subsequent years the ROC Armed Forces would not carry out even small-scale attacks against the mainland³⁷.

3.2 The tenacity of Chiang Kai-shek

In December 1969, Chiang Ching-kuo observed that while a power struggle continued within the CPC, the situation had not necessarily shifted in the ROC's favor. Maintaining a calm outlook, he asserted that it was necessary to act cautiously³⁸. Later, in March 1970, he would write in his diary that in order to retake the mainland, it was necessary to strengthen the defense of Taiwan³⁹.

On the other hand, Chiang Kai-shek remained passionately engaged in overseeing the preparations for an eventual "Retaking of the Mainland," even while spending an increasing amount of time in bed due to illness. In late March, he hosted a military council, where he ordered the revision of four types of counter-offensive operation plans⁴⁰. Then, in late July, he conducted an examination of operation plans, outlining

³².Telegram, September 23 1969, *FRUS, 1969–1976*, Vol. XVII, China, 1969–1972, Document 34, <https://history.state.gov/historicaldocuments/frus1969-76v17>.

³³.Memorandum, "Your Meeting with GRC Ambassador Chow Shu-kai," November 13 1969, *FRUS, 1969–1972*, Document 45.

³⁴."Mei Guowu Yuan Chongxin Weichi Dui Hua Fangwu Chengnuo" [US Department of State Reaffirms Commitment to China's Defense], *Zhongyang Ribao*, December 26 1969.

³⁵."Wanyan Angeniu Guangfan Huitan Yazhou Jushi" [Dinner at Agnew, a general discussion on the situation in Asia], January 2 1970, Lu, *JZZXNC*, 662–3.

³⁶."Meiguo Fu-zongtong Angeniu Fanghua Jiguan yu Jiang Jing-guo Jiu Zhonggong Dui Tai-Peng zhi Junshi Weixie Meiguo Tuoli Yazhou zhi Yaochuan F-4D Penshe-ji zhi Wenti ji Mei-haijun zai Taiwan Haixia Xunluo Wenti deng Tanhua Zhajiji" [US Vice President Agnew and Chiang Ching-kuo discuss the military threat to Taiwan and Penghu by the Chinese Communist Party, the US's F-4D jet aircraft, and the US Navy's patrol in the Taiwan Strait], January 3 1970, *CCKA*, 005–010100-00074-012.

³⁷.Matsuda, "Syo Kaiseki to 'Tairiku-Hanko,'" 353.

³⁸.CCKD, Diary entry for December 7 1969.

³⁹.CCKD, Diary entry for March 1 1970.

⁴⁰."Laicheng Benbu dui Guojun Di Shisi-jie Junshi Huiyi Zongtong Xunci Di Shiwu-an Fangong ZuozhanJihua Zuoye Wenti Youguan Gaijin Yijian Fenban Shixiang Zhixing Qingxing Baogao Biao Er-fen Ru Fujian, Gongqing-Jianhe" [Pleased to present to you the following two copies of the report on the implementation of the 15th ROC Armed Forces's General Presidential Discipline on the operation of the Counterattack Operation Plan for the 14th Military Conference], March 25

concrete action⁴¹. He ordered that map maneuvers be promptly carried out so that the plans could be verified and instructed the Chief of the General Staff, Lai Ming-tang, to rectify any problems that came to light⁴².

On January 1 1971, Chiang Kai-shek issued a “Message to Compatriots, Soldiers and People.” Noting that after a 60-year period, it was once more the year of the “Metal Boar” (the 48th year of the Chinese calendar’s sexagenary cycle), Chiang Kai-shek appealed to his compatriots on the mainland that the time for revolution was once more at hand, urging them to rise up against the CPC⁴³. During the opening ceremony for the military council that was held from the 15th of that month, Chiang Kai-shek argued that “[we] must bring about another revolution on the mainland, overthrow the CPC, regain control of the mainland, and re-build China.”⁴⁴

However, in a speech on foreign policy given on February 25, Nixon publicly raised the “Two-Chinas” policy for the first time, and referred to the CPC government as the “People’s Republic of China.” Chiang Kai-shek protested against the United States⁴⁵. At the same time, he was ready to accept the harsh reality and began to examine the option of withdrawing from the UN⁴⁶. With his health continuing to decline, Chiang Kai-shek resolved to entrust future “Territorial Recovery” to Chiang Ching-kuo. To that end, he decided to have Chiang Ching-kuo assume the office of President. For the time being, the first step was to appoint him as assistant to Yen Chia-kan, who at that time was the Vice-President and Premier⁴⁷.

3.3 Withdrawal from the UN and the transfer of power to Chiang Ching-kuo

Bogged down in the quagmire of the Vietnam War, the Nixon administration decided to get closer to the PRC, both as a means of bringing an early end to Vietnam conflict and as part of their anti-Soviet strategy. On September 16, Nixon held a special press conference, announcing that the United States was positively disposed toward the PRC joining the UN. He also asserted that according to UN regulations, it was not necessary for the ROC to withdraw. Furthermore, he suggested that when the PRC would join the UN, the ROC could, in exchange, receive a seat on the Security Council⁴⁸. Nevertheless, Chiang Kai-

1970, *ROC Armed Forces History Archives*, Taipei: Military History Compilation and Translation Office, MND, 58_003.8_6015-51_18_15. Hereafter, the *ROC Armed Forces History Archives* will be referred to as *AFHA*.

⁴¹ “Xiuzheng Jingcheng Jihua” [Revised Jingcheng plan], July 23 1970, Lu, *JZZXNC*, 699–700.

⁴² “Ziji Benyue Fansheng-lu” [Self-reflection of the month], July 31 1970, Lu, *JZZXNC*, 701; “Sikao Jingcheng Bingqi Tuiyan Ying Jiuzheng zhi Gexiang Quedian” [Thinking about the deficiencies of the Jingcheng Military Simulation], October 1 1970, Lu, *JZZXNC*, 702; “Ziji Shang-xingqi Fansheng-lu” [Self-reflection of last week], October 15 1970, Lu, *JZZXNC*, 702; “Ziji Shang-xingqi Fansheng-lu” [Self-reflection of last week], October 22 1970, Lu, *JZZXNC*, 703.

⁴³ “Zhonghua Minguo Liushi-nian Yuandan Gao Quanguo Junmin Tongbao-shu: Zhonghua Minguo Liushi-nian Yiyue Yiri” [National Compatriots’ Letter on New Year’s Day of the Sixth Year of the Republic of China: January 1 1971], Qin, ed. *Zongtong Jiang-gong Sixiang Yanlun*, 242–6.

⁴⁴ “Di Shiwu-jie Junshi Huiyi Bimu” [Closing of the 15th Military Conference], January 1 1971, Lai, *Lai Ming-tang Riji II*, 626.

⁴⁵ “Ziji Meiguo dui Zhonggong Pianmian Shihui, Woguo Jianjue Fandui ‘Liangge Zhongguo’ zhi Lundiao” [Since the US has been offering one-sided benefits to the Chinese Communist Party, we are firmly opposed to the ‘Two Chinas’ argument], February 26 1971, Lu, *JZZXNC*, 736.

⁴⁶ “Ziji Benyue Fansheng-lu” [Self-reflection of the month], Lu, *JZZXNC*, 743–4; “Yanni dui Lianheguo Jintui zhi Fangzhen” [To develop a policy for the advancement and retreat of the United Nations], April 1 1971, Lu, *JZZXNC*, 744–5; “Sikao Lianheguo Daibiao-quan ji Jintui Wenti” [Thinking about the right to represent the United Nations and the way forward and back], Lu, *JZZXNC*, 745.

⁴⁷ “Yi Jiangkang Zhuangkuang Bujia, Qi Si Anpai Jiang Jing-guo Jicheng Zhengwu” [In view of his poor health, it is urgent to arrange for Chiang Ching-kuo to continue his political affairs], June 9 1971, Lu, *JZZXNC*, 756.

⁴⁸ The President’s News Conference, September 16 1971, UCAPP.

shek was extremely shocked at this announcement, and further hardened his resolve that the ROC would withdraw from the UN⁴⁹.

Thus, in the UN General Assembly in October, an Albanian resolution was adopted that shifted the ROC government's right of representation of China within the UN to the PRC government. In February 1972, Nixon visited China. It was there that he announced his "Shanghai Communique," which premised the normalization of relations between the PRC and the United States. The intention of this communique was to clarify the respective positions of the United States and the PRC.

The communique included the following statements: "[The United States] affirms the ultimate objective of the withdrawal of all US forces and military installations from Taiwan." Further, "[The United States] will progressively reduce its forces and military installations on Taiwan as the tension in the area diminishes." As can be seen from such statements, the withdrawal of military forces and installations from Taiwan was now the policy of the United States⁵⁰. For the ROC, both the improvement of relations between China and the United States and the future poor prospects for military support were grave matters that were causes for serious concern.

4 Changes in US-PRC and US-ROC relations

4.1 Chiang Ching-kuo's inauguration as Premier of the ROC

Since his road accident in 1969, Chiang Kai-shek had gradually withdrawn from the political frontline. It was on June 1 1972, that power was formally handed over. Chiang Ching-kuo was appointed as Premier of the ROC, assuming responsibility for the affairs of the nation⁵¹. On the occasion, Chiang Kai-shek commanded Chiang Ching-kuo to achieve "the mission of once more uniting China."⁵² After becoming Premier, Chiang Ching-kuo played an active role in the task of building up the war potential of the ROC Armed Forces, continuing with his attendance of events such as the MND's monthly meetings⁵³.

The Operation Planning Office was abolished on July 20, roughly one and a half months after Chiang Ching-kuo's appointment as premier⁵⁴. Originally established in 1961 as the Guo-guang Operation Office, before being renamed in 1966, it had functioned as the principle supervising office for preparations to "Retake the Mainland." The abolition of this office suggests that the ROC had abandoned the idea of large-scale counter-offensive operations. From then on, the ROC Armed Forces' preferred method for "Retaking the Mainland" shifted entirely toward the "Wang-shih" operation plan⁵⁵.

⁴⁹. "Wei Nikesen Xuanbu Zhichi Zhonggong Ru Lian bing Qude Anlihui Xiwei Jigan" [Remembering Nixon's announcement of support for the Chinese Communist Party to join the United Nations and gain a seat on the Security Council], September 17 1971, Lu, *JZZXNC*, 763.

⁵⁰. Memorandum, March 1 1972, *FRUS, 1969-1972*, Document 205.

⁵¹. Chen and Li. *Xiong-wan Xiansheng Fanwen Jilu*, 120.

⁵². CCKD, Diary entry for May 21 1972.

⁵³. CCKD, Diary entry for June 28 1972.

⁵⁴. Major General Hsing Tsu-yuan interviewed by P'eng, *Chenfeng de Zuo-zhan Jihua*, 48; Matsuda argued that Chiang Kai-shek wrote his last diary entry on July 20, when the Operation Planning Office was abolished, so the "Retaking the Mainland" came to an end, coinciding with the exit of Chiang's life, see, Matsuda, "Syō Kaiseki to Tairiku-Hanko," 356-7.

With the signing of the Paris Peace Accord in January 1973, the war in Vietnam ended. The United States promptly began withdrawing troops from Taiwan. Although this action had already been announced in the Shanghai Communiqué, it was undeniable that it amounted to a decrease in military power when it came to defending Taiwan. The United States decided that over the course of 1974 it would withdraw the F-4 Fighter Unit, the U-2 Reconnaissance Plane Unit, and the nuclear armaments⁵⁶. Referring to Taiwan's economic growth, the US also decided to end the support given to the ROC in the form of MAP, from that financial year⁵⁷. On the other hand, the United States did continue to lend military support to the ROC, replacing MAP with FMS, which included an agreement to jointly produce F-5s and UH-1Hs from 1973 to 1978⁵⁸.

As the nature of the United States' military commitment changed as described above, the ROC Armed Forces moved ahead with the strengthening of their defensive systems. Yet despite this focus on defense, they framed Taiwan as a "Restoration Base." They thereby continued to adhere to the concept of an eventual "Retaking of the Mainland" by military force⁵⁹.

4.2 Chiang Kai-shek's death and "Retaking the Mainland"

Chiang Kai-shek passed away on April 5 1975. Roughly one month later, Chiang Ching-kuo addressed the Central Standing Committee for the first time as the head of the KMT. In this address, he expressed his thinking that "Today, military affairs are to take a higher priority than the economy."⁶⁰ Then, on August 21, Chiang Ching-kuo issued his formal instructions as premier, according to which the ROC military was to initiate the "Retaking of the Mainland" at an opportune time and achieve Chinese unification⁶¹. However, he struck a different tone on September 23, when he presented his administrative report for the new session of the Legislative Yuan, which was also the first session to take place following the death of Chiang Kai-shek. In this report, Chiang Ching-kuo outlined his "Future National Defense Policy" for the first time. Therein, he called for the military to be strengthened by updating weaponry, and turning the ROC Armed Forces into an elite force through a reduction in personnel⁶². I note that this report does not emphasize the need to "Retake the Mainland."

⁵⁵."Jin Laicheng Benbu Zhanbei Renwu Budui Bingli Tiaozheng-biao Ru Fujian, Jinqing-Jianhe" [Pleased to present to you the attached table of adjustment of the strength of the troops of the Headquarters for the battlefield mission], May 10 1972, *AFHA*, 61_543.1_4442_3_61.

⁵⁶.Memorandum, November 11 1973, *FRUS, 1969–1976*, Volume XVIII, China, 1973–1976, Document 56, <https://history.state.gov/historicaldocuments/frus1969-76v18>.

⁵⁷.Hiramatsu, *Taiwan Mondai*, 108–9.

⁵⁸.Briefing Paper, "Taiwan," October, 1973, *DNSA*, Item number CI02025.

⁵⁹.MHCTB, *Guomin Geming Jianjun-shi Book 4*, 1807–8.

⁶⁰.CCKD, Diary entry for May 12 1975.

⁶¹."Xingzheng Yuan Yanjiu Fazhan Kaohe Weiyuan-hui Hansong, Yuanzhang yu Bennian Ba-yue Ershiyi-ri Di Yi Si San Ba-ci Yuanhui Di Liu Ba Ling-hao Zhishi" [The Executive Yuan Research and Development Examination Committee sent a letter to the President of the Executive Yuan on August 21 2008, at the 148th meeting of the Executive Yuan, directing No. 680], September 5 1975, *Ministry of Foreign Affairs Archives*, Taipei: Archives, Institute of Modern History Academia Sinica, 11-EAP-00178.

⁶².Executive Yuan Premier Chiang Ching-kuo stated that the focus of future national defense policy would be to, first, implement a lean military policy; second, strive to upgrade weapons; third, maintain good military discipline; fourth, strengthen enduring combat power; and fifth, combat the enemy's vital interests, see, "Xingzheng Yuanzhang Shizheng Baogao" [Chief Executive's Policy Address], *Zhongyang Ribao*, September 24 1975.

Incidentally, on April 5 1976, a clash took place in Beijing's Tiananmen square between the Chinese authorities and members of the public who had gathered to mourn the passing of Zhou Enlai, who had died in January. In response, Chiang Ching-kuo issued a "Message to Our Compatriots Amongst the Chinese People," in which he called for the overthrow of the CPC⁶³. Chiang Ching-kuo also instructed the ROC Armed Forces to be ready to shift into combat mode when required, so that the opportunity for an anti-communist revolution was not allowed to slip away⁶⁴. The ROC Armed Forces subsequently proceeded with preparations for initiating counter-offensive operations, depending on the level of disturbance on the mainland⁶⁵.

Chiang Ching-kuo would send another "Message to Our Compatriots amongst the Chinese People" when Mao Zedong died on September 9. Once more, he called for a revolt, arguing: "With the death of Mao Zedong, now is the perfect time to rise up against the communists and retake our freedom." In the hope of encouraging rebellion against the CPC government amongst the public on the mainland, the contents of this speech were printed on leaflets and distributed over the mainland, using balloons⁶⁶. Map maneuvers were undertaken at this time by the ROC Armed Forces, which resulted in revisions made to the "Wang-shih" operation plan⁶⁷. Preparations for "Retaking the Mainland" were thereby advanced further.

On February 25 1977, Chiang Ching-kuo presented another administrative report to the Legislative Yuan. In this report, he emphasized that the ROC Armed Forces were preparing to initiate counter-offensive operations, depending on how the situation changed on the mainland⁶⁸. However, in the end, the ROC Armed Forces did not undertake any military action. Even Special Operation Forces were not sent to infiltrate the mainland, let alone to engage in small-scale counter-offensive operations.

4.3 Chiang Ching-kuo's inauguration as President and the rupture between the United States and Taiwan

In March 1978, during the 1st period of the 6th National Assembly, Chiang Ching-kuo was selected as the 6th president of the ROC. Two months later, on May 20, he gave his inauguration speech, indicating that he would continue with the basic policy line established by Chiang Kai-shek⁶⁹. Half a year later, on December 16, Chiang Ching-kuo confronted his greatest diplomatic challenge, when US President Jimmy Carter announced that the United States would establish diplomatic relations with the PRC from January 1 1979. At the same time, he informed the ROC that he would end the Mutual Defense Treaty between the United States of America and the ROC⁷⁰. In response

⁶³."Liding Juexin Buzuo Maogong Zhenya Tongbao de Tongzhi Gongju," [Translation in English] in *Jiang Jing-guo Xiansheng Quanji* Vol. 13, 8–12. Hereafter, *Jiang Jing-guo Xiansheng Quanji* will be referred to as *JJXQ*.

⁶⁴.CKKD, Diary entry for April 21 1976.

⁶⁵.MHCTB, *Guomin Geming Jianjun-shi Book 4*, 1807–9; Wang, *Hui Shou Lai Shi*, 353–4.

⁶⁶."Yi Guomintang Zhuxi Shenfen Gao Dalu Tongbao-shu" [Letter to Our Compatriots in Mainland China as Chairman of the Kuomintang], *Zhongguo Guomindang Zhongyang Weiyuan-hui Zuzhi Gongzuo-hui, Jiang Zhushi Yanlunji*, 222–7.

⁶⁷.MHCTB, *Guomin Geming Jianjun-shi Book 4*, 1809.

⁶⁸."Xingzheng Yuanzhang Shizheng Baogao" [Chief Executive's Policy Address], *Zhongyang Ribao*, February 26 1977.

⁶⁹."Yi Shenmou Neng Duanlai Shixian Guojia Mubiao" [To achieve national goals with prudence and determination], *ZhongyangWenhua Gongzuo-hui, Guojia Guoce Guoyun*, 47–52.

⁷⁰."Diplomatic Relations Between the United States and the People's Republic of China Unites States Statement," December 15 1978, UCAPP.

to these developments, Chiang Ching-kuo declared that the ROC would not abandon its territorial rights and sovereignty over the mainland, and promised that it would fulfill its mission to unify China⁷¹. During the NSC held on the 24th of that month, Chiang Ching-kuo further stated that “[we] remain committed to the basic national policy of anti-communism and territorial recovery, and will carry out the Three Principles of the People as an unchanging aim.”⁷² Adopting this dauntless attitude, Chiang Ching-kuo sought to weather the crisis.

On January 1 1979, the ROC announced that it would suspend its diplomatic relations with the United States in response to the nation’s establishment of relations with China. In response, Carter hurriedly took steps to have Congress pass laws that were required for the United States to support its relationship with “Taiwan” following the severing of diplomatic relations. On April 10, Congress enacted the Taiwan Relations Act (TRA), which included provisions relating to Taiwan’s security and weapon sales. This act, which was retroactively dated to January 1, was aimed at assisting the ROC at a non-governmental level, including in areas such as commercial relations⁷³. The US government also established the American Institute in Taiwan (AIT), through which it sought to carry out operations on the basis of the TRA⁷⁴.

On October 14, AIT Chairman David Dean stated that arms sales to the ROC would recommence the following year⁷⁵. On January 3 1980, the United States government announced that on the basis of the TRA, it would supply the ROC with the F-104G⁷⁶. In effect, arms sales commenced only a few days after the end of the Mutual Defense Treaty.

4.4 The unification of China according to Three Principles of the People

The 12th National Congress of the KMT commenced on March 29 1981. Chiang Ching-kuo spoke at the opening ceremony, expressing his determination with the declaration that “the 70th decade of the ROC (1981–1990) would be the decade when the Three Principles of the People would be victorious, and the decade when the ROC would retake the mainland.” He called for the “unification of China according to the Three Principles of the People.”⁷⁷

The Chief of the General Staff, Song Chang-chi, addressed the congress the following day. He stated that future efforts by the ROC Armed Forces would be guided

⁷¹.“Renhe Zhuangkuang-xia Juebu yu Gongfei Hetan” [Never negotiate with the communists under any circumstances], JYZHW, *Jiang Zongtong Jing-guo Xiansheng’s Vol.12*, 55–7.

⁷².ZhongyangWenhua Gongzuo-hui, *Guojia Guoce Guoyun*, 81–4.

⁷³.H.R.2479-Taiwan Relations Act, 96th Congress (1979–1980), Library of Congress, <<https://www.congress.gov/bill/96th-congress/house-bill/>>, accessed on October 4 2020.

⁷⁴.American Institute in Taiwan, “Our Relationship,” <<https://www.ait.org.tw/our-relationship/>>, accessed on October 4 2020.

⁷⁵.“Mei Zi Mingnian Kaishi Xu Shou Woguo Wuqi” [From next year, the US will continue to sell our weapons], *Qingnian Zhanshibao*, October 16 1979.

⁷⁶.“US to Sell Taiwan Defense Missile,” *The New York Times*, January 4 1980; “Mei yi Zhengshi Tongzhi Woguo” [The United States has officially notified our country], *Qingnian Zhanshibao*, January 4 1980; “Mei Xu Shou Wo Wuqi” [US covenant to sell me weapons], *Qingnian Zhanshibao*, January 5 1980.

⁷⁷.“Shi-er Quanhui Yuanman Bimu Fabiao Xuanyan Shijian Zhuxi Haozhao Jueyi Sanmin-Zhuyi Tongyi Zhongguo” [The 12th Plenary Session closed with a declaration to put into practice the President’s call to unify China with the Three Principles of Democracy], *Zhongyang Ribao*, April 6 1981; “Bendang Di Shier-ci Quanguo Daibiao Dahui Zhongyao Yiti Timu, Tizhi” [Topics and objectives of important issues of the 12th National Congress of the Party], *Records of the 194th Meeting of the Standing Committee of the 11th Central Committee of the KMT*, December 3 1980, Taipei: KMT Party History Institute, Hui 11.3/194.

by the principle of “Consolidating the Restoration Base and Creating Opportunities for Retaking the Mainland,” and that they would “push forward toward the goal of “Territorial Recovery.”⁷⁸ In early December, the ROC Armed Forces conducted joint exercises to inspect the Taiwan-Penghu defense operations plan. On the occasion, fresh orders were issued by Hau Pei-tsun, who had taken over the role of Chief of the General Staff from Song in November. Hau ordered an examination of the concrete steps required for achieving a “Unity of the Offensive and Defensive,” while also “creating opportunities for retaking the mainland.”⁷⁹ At the same time, he instructed the ROC Armed Forces as a whole to consider the proposition of “how to create a favorable opportunity for “Retaking the Mainland.”⁸⁰

Following the 10th National Congress in March, the ROC adopted the slogan of “Unifying China with the Three Principles of the People,” pushing back against the PRC’s “Peaceful Unification” offensive. However, they retained, as before, the guiding idea that military means should be utilized to help bring about a revolution in mainland China, which could then lead toward a “Retaking of the Mainland.”

5 The strategic shift from the “Unity of the Offensive and Defensive” to a “Defensive Posture”

5.1 Counter-offensive operation plans after the lifting of martial law

On October 7 1986, Chiang Ching-kuo announced that the ROC would end martial law, which had been in place since 1949⁸¹. The KMT Central Standing Committee, which met on the 15th, unanimously decided that revisions would be made to the law known as “Temporary Provisions Effective During the Period of National Mobilization for Suppression of the Communist Rebellion.”⁸²

Roughly one week later, the ROC conducted the “Kuo-kuang” Joint Operation Exercises on the centenary of Chiang Kai-shek⁸³. The codename of “Kuo-kuang” was the same as the name given to the general plan for counter-offensive operations that had been developed in 1961 under the orders of Chiang Kai-shek. However, these military exercises were not conducted simply for the sake of the anniversary. They were also a means of demonstrating the use of the ROC’s latest weaponry via target practice, so that it could be observed by people such as government executive officials, foreign military officers stationed in Taiwan, public representatives, veterans, the general public, and

⁷⁸ “Guojun Chuangji Fangong Shizhi Fuguo Jianguo” [The ROC Armed Forces creates an opportunity for a counter-attack to restore the country], *Qingnian Zhanshibao*, May 31 1981.

⁷⁹ Hao, December 10 1981, Hao, and Wang. *Hao Zhongzhang Riji-zhong de*, 24.

⁸⁰ “Jiansong Zongzhang yu Di Ershiba-ci Zuozhan Huibao Dui Yoiuguan ‘Dangqian Guojun Jianjun Beizhan zhi Jiben Fangzhen’ zhi Zhishi, Ru Fujian, Qingjiu Youguan Bufen Yanni Juti Cuozi, yu Mingnian Yi-yue Shiwu-riqian Hansong Benshi Huiban, December 17 1981” [Please send the instructions of the Chief of General Staff to the 28th Battle Council regarding the “Basic Guidelines for the Construction and Preparation of the ROC Armed Forces,” as attached, to this office by January 15 next year], *AFHA*, 70_0510.4_6355_4_23.

⁸¹ “Xiwang Jinzao Jiechu Jieyanling” [Hopes for early lifting of the martial law], Jiang Jing-guo Xiansheng Quanji Bianji Weiyuan-hui, *JXQ Vol.15*, 175–8.

⁸² “Yi Kaikuo de Xiongjin Tuidong Gexin shi Mingzhu Xianzheng geng Hexie Wanmei” [Promote innovation with an open mind to make democracy and constitutionalism more harmonious and perfect], *Zhongyang Ribao*, October 16 1986.

⁸³ “Guojun Jin zai Bingdong” [The ROC Armed Forces will conduct the Guo-guang Exercise in Pingtung today], *Qingnian Ribao*, October 15 1986; “Guo-guang Sanjun Lianhe Yanxi” [The joint exercise was held in the southern east yesterday], *Qingnian Ribao*, October 16 1986; Hao’s Diary, October 7 1986, Hao, *Ba-nian Canmou-zongzhang Riji*, 1003; Hao’s Diary, October 15 1986, Hao, *Ba-nian Canmou-zongzhang Riji*, 1007.

overseas Chinese who had returned to Taiwan. Now, the codename of “Kuo-kuang” no longer directly implied “Retaking the Mainland,” but instead had transformed into an expression enshrining Chiang Kai-shek’s commitment to “Retake the mainland.”

On July 1 1987, the ROC enacted and promulgated the “National Security Act During the Period of National Mobilization for Suppression of the Communist Rebellion.” Martial law was subsequently lifted on the 15th. Along with the enforcement of this law, the MND proceeded with revisions to its defense operation plans and prescribed a number of regulations concerning the defense of Taiwan, including the “Taiwan-Penghu Defense Operations ROC Armed Forces War Preparation Provision.” On the other hand, in line with the guiding policy that “the principal battlefield is the mainland, and the secondary battlefield is Taiwan,” the MND continued with plans for collecting information on the mainland, and revised its amphibious operation plans for the coast of Fujian Province⁸⁴. Meanwhile, the training conducted by the Army’s paratroopers was also modified. Initially carried out on the basis of Taiwan-Penghu defense operations, and prescribed as “Top Secret” even within the context of the already secretive “Ku-an” operation plan, this training was now altered to focus on an offensive plan for initiating a retaking of the mainland⁸⁵.

Given that the enactment of martial law indicates a state of emergency, its lifting can also be considered to represent a point of serious strategic transformation for the ROC. Nevertheless, the ROC did not yet move away from the strategy of maintaining a “Unity of the Offensive and Defensive.”

5.2 Chiang Ching-kuo’s death and the “Retaking of the Mainland”

On January 13 1988, Chiang Ching-kuo passed away. According to the constitution, Vice-President Lee Teng-hui assumed the position of President. On January 15, the Central Committee of the KMT issued a “Message to Our Compatriots Amongst the Chinese People,” informing the people of the mainland that Chiang Ching-kuo had died. The Central Committee also appealed for solidarity, and for carrying out a joint struggle against the communists. It expressed the ROC’s commitment to maintaining Chiang Ching-kuo’s policy of “Anti-Communism and Territorial Recovery” and affirmed the ROC’s determination to unite China according to the Three Principles of the People⁸⁶.

After Chiang Ching-kuo’s death, the ROC Armed Forces increased its state of alertness. They prepared for a possible invasion of Taiwan by the PRC, in case it sought to exploit the situation⁸⁷. On February 4, the Executive Yuan submitted its administrative report for the second half of 1987 to the Legislative Yuan. The report explained that the preparation strategy for the ROC Armed Forces was based on “the strategic concept of the ‘Unity of the Offensive and Defensive,’ with the principle objective being the defeat of the enemy using the entire body of the military.” Moreover, the report stated that

⁸⁴.MHCTB, MND Yearbook 1987, 49; “Xiuding Jianye Yanxi Silingbu Ju-guang Yanxi Jihua 73–1 Hao Fujian 6-Houqin Jihua Qianhe” [Revision of the establishment of the Operational Exercise Command Ju-guang Exercise Plan No. 73–1 Annex 6 – Logistics Plan Sign-off], September 23 1987, *AFHA*, 76_1732.4_4460_1_1.

⁸⁵.Li, P’ei-yao (Major General of the ROC Army Reserve), interview by author, Taipei, October 23 2019.

⁸⁶.“Zhizhengdang Fabiao Gao Dalu Tongbao Shu Huyu Zhongguo Tongyi Gongtong Fendou” [The ruling party unanimously approved at the Central Committee meeting that Lee Standing Committee Teng-hui is acting as the chairman], *Zhongyang Ribao*, January 15 1988.

⁸⁷.“Guojun Jiaqiāng Jiebei” [The ROC Armed Forces on Alert for Enemy Intrusion], *Qingnian Ribao*, January 14 1988.

“emphasis was being given to defensive operation, with full scale preparations for war taking place.”⁸⁸ We can see from this report that the strategy of a “Unity of the Offensive and Defensive” was maintained by the ROC even after the death of Chiang Ching-kuo.

As it happened, in the Spring of 1988, the ROC Armed Forces were criticized during a session of the Legislative Yuan. It was pointed out that although the Armed Forces were effectively focusing on “defense,” they had nevertheless maintained their organizational structure on the basis of “offense.” However, in the Fall session of the Legislative Yuan, Cheng Wei-yuan of the MND emphasized that: “The present duties of the ROC Armed Forces are to ‘Consolidate the Restoration Base and Create Opportunities for Retaking the Mainland,’ and this policy would remain unchanged.” He further explained that: “The ROC Armed Forces are constantly engaged in training and in actively preparing for conflict. Although we have adopted the posture of a defensive operation strategy in line with the fundamental principle of the ‘Unity of the Offensive and Defensive,’ [nevertheless] it is possible for us to shift toward offensive operations when necessary, with only minimal adjustment.”⁸⁹ Hence, although there were criticisms with respect to preparations for an offensive that would be difficult to carry out in reality, the ROC Armed Forces maintained a strategy that was in line with the “Unity of the Offensive and Defensive.” As before, they continued with their efforts to prepare for their counter-offensive operations, which would deploy Special Operation Forces as the vanguard⁹⁰.

5.3 The establishment of guidelines for national unification and the shift to a “Defensive Posture” strategy

On March 21 1990, the National Assembly appointed Lee Teng-hui as the 8th president. Lee Teng-hui had already served in the capacity of president for the remainder of Chiang Ching-kuo’s term following his death. In his inauguration speech, given on May 20, Lee outlined the goal of a one year “period of mobilization for the suppression of the Communist rebellion.”⁹¹ In the annual operation review meeting for the ROC Armed Forces, held on July 27, Lee stated that: “There is absolutely no change in the goal of unifying China. What has changed is strategy and methods we shall use to achieve that goal.”⁹² Here, Lee indicated that an end had finally come regarding the goal of using military force to unify China. It was, in other words, the end of the policy of “Retaking the Mainland.”

In August of that year, the Presidential Office strengthened its capacity for working out a mainland policy. It decided upon the establishment of a National Unification Council (NUC), which would work toward the creation of a plan for the future

⁸⁸. “Guofang Jianshe Xubing Guiding Zhengce Quanmian Jiaqiang Beizhan” [National Defense Construction Continues to Require Policies to Enhance Readiness Across the Board], *Qingnian Ribao*, February 5 1988.

⁸⁹. “Guojun Baoguo Weimin Chuangji Fangong Dalu” [The ROC Armed Forces protects the country and defends the people by creating opportunities to retaking the mainland], *Qingnian Ribao*, October 27 1988.

⁹⁰. MHCTB, *MND Yearbook 1988*, 57; MHCTB, *MND Yearbook 1989*, 55.

⁹¹. “Li Zongtong Xiang Shi-er Zhongguoren Zhuangyan Xuangao” [President Li announced strictly to 1.2 billion Chinese people], *Zhongyang Ribao*, May 21 1990.

⁹². “Jiansong Guojun Qishijiu-niandu Gongzuo Yantao-hui Zongtong Yuanzhang Buzhang Jianghua ji Zongzhang Kai-bibu Jianghua yu Dui Ge Zhuanti ji Zongjie Baogao Cai Zhishi Shixiang Jilu Ru Fujian Qing Chazha” [Please find attached the minutes of the President’s opening and closing speeches, as well as the special topics and the final report of the ROC Armed Forces Seventy-Ninth Annual Working Seminar], September 12 1990, *AFHA*, 79_1763_6015_1_8.

unification of China⁹³. On October 7, Lee announced the founding of the NUC, and the examination of new guidelines for mainland policy began⁹⁴.

At the 3rd meeting of the NUC, held on February 23 1991, the members decided upon the so-called Guidelines for National Unification⁹⁵. These guidelines were in turn adopted at the 2223rd meeting of the Executive Yuan, held on March 14⁹⁶. On March 9, the MND's Ch'en Lu-an noted that: "Even after the conclusion of the period of mobilization for the suppression of communist rebellion, the Communist Party remains our hypothetical enemy." He further explained: "Our anti-communist policy remains unchanged, and the state of military confrontation has not ended."⁹⁷ In a special gathering held on April 22, the National Assembly passed a proposal for "Amending the Constitution of the ROC," along with a proposal to abolish the "Temporary Provisions Effective During the Period of National Mobilization for Suppression of the Communist Rebellion."⁹⁸ On May 1, this so-called Period of Mobilization for the Suppression of the Communist Rebellion finally ended after 43 years⁹⁹.

The end of this period was interpreted by some as a signal of the abandonment of the "Anti-Communism & Territorial Recovery" basic national policy, which viewed the CPC as a rebel organization¹⁰⁰. It is for this reason that Hau Pei-tsun explicitly stated that: "[Even if] the Period of Mobilization for the Suppression of the Communist Rebellion has concluded, we have not abandoned our basic national policy of 'Anti-Communism & Territorial Recovery.'"¹⁰¹ Hau emphasized that the ROC would continue to oppose the CPC government. However, it should be noted that on July 27, the Retake the Mainland Design and Research Committee was also abolished. This committee had been established by Chiang Kai-shek in 1954, and had continued to investigate various strategies for unifying China over a period of some 37 years¹⁰². The abolition of the committee signified that, although the ROC was maintaining its basic national policy of "Anti-

⁹³. "Guojia Tongyi Weiyuanhui Xiayue-zhong Kewang Chengli" [The National Unification Committee is expected to be established in the middle of next month], *Zhongyang Ribao*, August 19 1990.

⁹⁴. "Li Zongtong Zhengzhong Xuangao Zhongguo de Kunan Yinggai Zaori Jieshu Zhongguo de Lingtu Yinggai Zairi Tongyi" [President Li solemnly declares that China's suffering should end soon and that China's territory should be reunified soon], *Zhongyang Ribao*, October 8 1990.

⁹⁵. "Guojia Tongyi Gangling Heding yi Hansong Xingzheng Yuan Banli" [The Guidelines for National Unification approved and sent to the Executive Yuan for processing], *Zhongyang Ribao*, March 6 1990.

⁹⁶. "Li Zongtong Queding Guojia Tongyi Gangling Quanwen" [President Lee confirmed the full text of the Guidelines for National Unification], *Zhongyang Ribao*, March 6 1991; "Zheng Yuan Tongguo 'Guojia Tongyi Gangling' Jiaoyou Luweihui Xietiao Ge Jiguan Peihe Banli" [The Guidelines for National Unification was approved by the Executive Yuan and sent to the Land Commission for coordination with various agencies], *Zhongyang Ribao*, March 15 1991.

⁹⁷. "Chen Buzhang: Dongyuan Kanluan Zhongzhi Yihou, Zhonggong Reng Wei Wo Jiaxiang Di" [Minister Chen: After the termination of counter-insurgency mobilization, the Chinese Communist Party is still my imaginary enemy], *Qingnian Ribao*, May 10 1991.

⁹⁸. "Guoda Wancheng Di-yi Jieduan Xiu Xianfa Renwu Zhiding Xianfa Zengxiu Tiaowen bing Feizhi Linshi Tiaokuan" [The National Assembly completes the first stage of the task of amending the constitution, formulates additional articles of the constitution and abolishes temporary provisions, and the president will announce the effective date of May 1], *Zhongyang Ribao*, April 23 1991.

⁹⁹. "Li Zongtong Xuanbu Dongyuan Kanluan Shiqu Zhongzhi" [President Lee announced the end of the period of mobilization for the suppression of Communist and expressed his deep hope that the mainland authorities would show sincerity and take concrete actions in response], *Zhongyang Ribao*, May 1 1991.

¹⁰⁰. Wakabayashi, *Taiwan no Seiji: Chu-ka* 180.

¹⁰¹. "Dongyuan Kanluan Shiqu Jiang Zhongzhi Hao Yuanzhang Qiangdiao Fangong Lichang Bujian" [The period of mobilization for the suppression of Communist is about to end, Premier Hao stresses that his anti-communist stance will not change], *Zhongyang Ribao*, April 26 1991.

¹⁰². Office of the President Republic of China, "Feizhi Guangfu Dalu Sheji Yanjiu Weiyuan-hui Zuzhi Tiaolie" [Repeal of the Organizational Ordinance of the Continental Design Study Committee], Zongtong-fu Gongbao [Presidential Bulletin]. No.5444. July 27 1991.

Communism & Territorial Recovery,” it had nevertheless abandoned the grand design of unifying China that it had pursued since the days of Chiang Kai-shek, including the concept of “Retaking the Mainland.”

From the summer of 1991, the ROC Armed Forces ceased using the slogan of “Consolidate the Restoration Base and Create Opportunities for Retaking the Mainland,” which had until that point been used to express the strategy of the “Unity of the Offensive and Defensive.”¹⁰³ In the middle of August, the ROC Armed Forces began a process of even further personnel reductions and unit consolidations, as part of its defensive strategy¹⁰⁴. At the same time, another notable change occurred: The basic plan for the Taiwan-Penghu defense operations, known as the “Ku-an” operation plan, contained a partial plan for shifting toward an offensive footing at an appropriate moment, in order to “Retake the Mainland.” This partial plan was now shelved¹⁰⁵.

Under the twin ROC policies of “Retake the Mainland” and “Construct a Restoration Base,” from 1969 onward, the ROC Armed Forces had based its actions upon the strategy of the “Unity of the Offensive and Defensive.” It was in following this strategy that it had developed its military preparedness with an emphasis on the defense of Taiwan, while also preparing for an eventual “Retaking of the Mainland” as a military means of unifying China. However, the establishment of the Guidelines for National Unification, which served as the new basis for mainland policy, signaled that this era was now drawing to a close. Although the state of military confrontation with the PRC was to continue, the concept of “Retaking the Mainland” by way of military force was abandoned. Instead, the ROC shifted toward a “Defensive Posture Strategy.”¹⁰⁶

6 Conclusion

In this article, I have sought to show that the ROC under Chiang Ching-kuo maintained its adherence to the concept of “Retaking the Mainland” as a military means of achieving the unification of China. The ROC’s military strategy did not shift away from the pursuit of the “Unity of the Offensive and Defensive.” Furthermore, compared with the

¹⁰³.The MND Yearbook 1991 from July 1 1990 to June 30 1991 had a description of the mission of the ROC Armed Forces as “Consolidate Restoration Base and Create Opportunities for Retaking the Mainland,” but the MND Yearbook 1992 from July 1 1991 to June 30 1992 did not have a description of the mission of the ROC Armed Forces.

¹⁰⁴.“Lingban ‘Lu-jing Qi-hao’an Xin(Gai)-bian Budui Biancheng Dianyan Shishi Jihua, Ru Fujian. Qing Zhaoban,” October 2 1991, *AFHA*, 79_1930_9592_8_3.

¹⁰⁵.Li, P’ei-yao, interview by author, Taipei, October 23 2019.

¹⁰⁶.On May 5 2015, Lee Teng-hui clarified: “I abolished the ‘Temporary Provisions Effective During the Period of National Mobilization for Suppression of the Communist Rebellion’ clause in 1991 because there were people in the KMT at that time who were thinking about the ‘Retaking the Mainland,’ and I established the ‘the Guidelines for National Unification’ in order not to let them fight,” see, “Li Zongtong: Guo-tong Gangling shi Yao Jiang gei Wo Lao Xiansheng Ting de,” The Central News Agency, May 5 2015, <https://www.cna.com.tw/news/aip/20150505018.aspx> (accessed on October 4 2020); In May 1999, Defense Minister T’ang Fei answered questions from the Surveillance Commissioner. He said: “Now you are talking about a political change; until the announcement of the Guidelines for National Unification, you have already declared that you will not use force to counterattack, and the offensive posture strategy has been changed to a defensive strategy. The defensive posture gives a good theoretical basis for the Jingjin Streamlining Program. It is that at first, we knew it was impossible to counterattack by force, but the strategy was the Unity of the Offensive and Defensive, so the structure remains the same as if we were to one day attack the mainland by force. After that cut, we all know that it is purely a defensive battle.” See, “Jianche-yuan Huang-weiyuan Huang-xiong, Lv-weiyuan Xi-mu Diaocha ‘Guojun Shinian Bingli Zhengjian-an’ yu ‘Jingshi-an’ Yuexun Jilu (8)” [Supervisory Yuan Member Huang Huangxiong and Member Lu Ximu investigated the “ROC Armed Forces Ten-Year Military Strength Reconstruction plan” and the “Jing-shi plan” Consultation Record (8)], May 21 1999, T’ang Fei papers, Box 6, 2003C20, Hoover Institution Library & Archives, Stanford, CA.

explanations given in both the NDR2006 and NDH2013 documents, I have provided an alternative account of when the two major strategic transitions occurred. I have clarified that the initial shift from the “Offensive Posture” strategy to the “Unity of the Offensive and Defensive” strategy occurred in the spring of 1969. Meanwhile, the shift to the “Defensive Posture” strategy occurred in the summer of 1991.

Since 1949, the ROC had attempted to move forward with operations for the “Retaking of the Mainland” on a number of occasions, in line with the “Offensive Posture” strategy. However, it was unable to secure the support of the United States. In the end, therefore, the ROC was left incapable of launching any large-scale counter-offensive operations.

Later, in the second half of the 1960s, the United States decided on the future winding down of the MAP program. In response, the ROC was left with no choice but to focus on strengthening its economic base, so that it would be able to construct a military force capable of “Retaking the Mainland”; a new “Unity of the Offensive and Defensive” strategy was adopted, which gave greater emphasis to the defense of Taiwan through the expansion of its economic base.

Even after the lifting of martial law in 1987 and the death of Chiang Ching-kuo in 1988, the ROC maintained the “Unity of the Offensive and Defensive” strategy. However, under Lee Teng-hui, who succeeded Chiang Ching-kuo as president, the so-called Guidelines for National Unification were established in March 1991, and in May led to the end of the “Period of Mobilization for the Suppression of Communist Rebellion.” Although the ROC maintained its basic national policy of “Anti-Communism and Territorial Recovery,” the aim of “Retaking the Mainland” was effectively abandoned.

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