

The Taiwan Long Game

Why the Best Solution Is No Solution

By Jude Blanchette and Ryan Hass

For 70 years, China and the United States have managed to avoid disaster over Taiwan. But a consensus is forming in U.S. policy circles that this peace may not last much longer. Many analysts and policymakers now argue that the United States must use all its military power to prepare for war with China in the Taiwan Strait. In October 2022, Mike Gilday, the head of the U.S. Navy, warned that China might be preparing to invade Taiwan before 2024. Members of Congress, including Democratic Representative Seth Moulton and Republican Representative Mike Gallagher, have echoed Gilday's sentiment.

There are sound rationales for the United States to focus on defending [Taiwan](#). The U.S. military is bound by the 1979 Taiwan Relations Act to maintain the capacity to resist the use of force or coercion against Taiwan. Washington also has strong strategic, economic, and moral reasons to stand firm on behalf of the island. As a leading democracy in the heart of Asia, Taiwan sits at the core of global value chains. Its security is a fundamental interest for the United States.

Ultimately, however, Washington faces a strategic problem with a defense component, not a military problem with a military solution. The more the United States narrows its focus to military fixes, the greater the risk to its own interests, as well as to those of its allies and Taiwan itself. War games held in the Pentagon and in Washington think tanks, meanwhile, risk diverting focus from the sharpest near-term threats and challenges that Beijing presents.

The sole metric on which U.S. policy should be judged is whether it helps preserve peace and stability in the Taiwan Strait—not whether it solves the question of Taiwan once and for all or keeps Taiwan permanently in the United States' camp. Once viewed this way, the real aim becomes clear: to convince leaders in Beijing and Taipei that time is on their side, forestalling conflict. Everything the United States does should be geared toward that goal.

To preserve peace, the United States must understand what drives China's anxiety, ensure that Chinese President Xi Jinping is not backed into a corner, and convince Beijing that unification belongs to a distant future. It must also develop a more nuanced understanding of Beijing's current calculus, one that moves beyond the simplistic and inaccurate speculation that Xi is accelerating plans to invade Taiwan. Support for Taiwan should bolster not only the island's security but also its resilience and prosperity. Assisting Taiwan will also require new U.S. investments in tools that benefit the island beyond the military realm, including a more holistic deterrence strategy to deal with Beijing's coercive gray-zone tactics. Critics may contend that this approach sidesteps the hard questions at the root of the confrontation, but that is precisely the point: sometimes, the best policy is to avoid bringing intractable challenges to a head and kick the can down the road instead.

SEA CHANGE

In the final years of the 1945–49 Chinese Civil War, the losing Nationalists retreated to Taiwan, establishing a mutual defense treaty with the United States in 1954. In 1979, however, Washington severed those ties so it could normalize relations with Beijing. Since then, the United States has worked to keep the peace in the Taiwan Strait by blocking the two actions that could lead to outright conflict: a declaration of independence by Taipei and forced unification by Beijing. At times, the United States has reined in Taiwan when it feared the island was tacking too close to independence. In 2003, President George W. Bush stood next to Chinese Premier Wen Jiabao and publicly opposed “comments and actions” proposed by Taipei that the United States saw as destabilizing. At other times, the United States has flexed its military muscle in front of Beijing, as it did during the 1995–96 Taiwan Strait crisis, when U.S. President Bill Clinton sent an aircraft carrier to the waters off Taiwan in response to a series of Chinese missile tests.

Also important to the U.S. approach have been statements of reassurance. To Taiwan, the United States has made a formal commitment under the 1979 Taiwan Relations Act to “preserve and promote extensive, close, and friendly commercial, cultural, and other relations” with Taiwan and to provide the island “arms of a defensive character.” To Beijing, the United States has consistently stated that it does not support Taiwan’s independence, including in its 2022 National Security Strategy. The goal was to create space for Beijing and Taipei to either indefinitely postpone conflict or reach some sort of political resolution.

For decades, this approach worked well, thanks to three factors. First, the United States maintained a big lead over China when it came to military power, which discouraged Beijing from using conventional force to substantially alter cross-strait relations. Second, China was focused primarily on its own economic development and integration into the global economy, allowing the Taiwan issue to stay on the back burner. Third, the United States dexterously dealt with challenges to cross-strait stability, whether they originated in Taipei or Beijing, thereby tamping down any embers that could ignite a conflict.

Over at least the past decade, however, all three of these factors have evolved dramatically. Perhaps the most obvious change is that China’s military has vastly expanded its capabilities, owing to decades of rising investments and reforms. In 1995, as the United States sailed the USS *Nimitz* toward the Taiwan Strait, all the People’s Liberation Army (PLA) could do was watch in indignation. Since then, the power differential between the two militaries has narrowed significantly, especially in the waters off China’s shoreline. Beijing can now easily strike targets in the waters and airspace around Taiwan, hit U.S. aircraft carriers operating in the region, hobble American assets in space, and threaten U.S. military bases in the western Pacific, including those in Guam and Japan. Because the PLA has little real-world combat experience, its precise effectiveness remains to be seen. Even so, its impressive force-projection capabilities have already given Beijing confidence that in the event of conflict, it could seriously damage the United States’ and Taiwan’s forces operating around Taiwan.

Alongside China’s military upgrades, Beijing is now more willing than ever to tangle with the United States and others in pursuit of its broader ambitions. Xi himself has accumulated greater power than his recent predecessors, and he appears to be more risk-tolerant when it comes to Taiwan.

Finally, the United States has abandoned any pretense of acting as a principled arbiter committed to preserving the status quo and allowing the two sides to come to their own peaceful

settlement. The United States' focus has shifted to countering the threat China poses to Taiwan. Reflecting this shift, U.S. President Joe Biden has repeatedly said that the United States would intervene militarily on behalf of Taiwan in a cross-strait conflict.

READY, SET, INVADE?

Driving this change in U.S. policy is a growing chorus arguing that Xi has decided to launch an invasion or enforce a blockade of Taiwan in the near future. In 2021, Admiral Philip Davidson, then the head of the U.S. Indo-Pacific Command, predicted that Beijing might move against Taiwan “in the next six years.” That same year, the political scientist Oriana Skylar Mastro likewise contended, in *Foreign Affairs*, that “there have been disturbing signals that Beijing is reconsidering its peaceful approach and contemplating armed unification.” In August 2022, former U.S. Deputy Assistant Secretary of Defense Elbridge Colby wrote, also in *Foreign Affairs*, that the United States must prepare for an imminent war over Taiwan. All these analyses base their judgments on China's expanding military capabilities. But they fail to grapple with the reasons why China has not used force against Taiwan, given that it already outmatches the island in military strength.

For its part, Beijing has stuck to the message that cross-strait relations are moving in the right direction. China's leaders continue to tell their people that time is on their side and that the balance of power is increasingly tilting toward Beijing. In his speech at the 20th National Congress of the Chinese Communist Party (CCP) in Beijing in October 2022, Xi declared that “peaceful reunification” remains the “best way to realize reunification across the Taiwan Strait,” and that Beijing has “maintained the initiative and the ability to steer in cross-strait relations.”

Yet at the same time, Beijing believes that the United States has all but abandoned its “one China” policy, in which Washington acknowledges China's position that there is one China and Taiwan is a part of it. Instead, in the eyes of Beijing, the United States has begun using Taiwan as a tool to weaken and divide China. Taiwan's internal political trends have amplified China's anxieties. The historically pro-Beijing Kuomintang Party has been marginalized, while the independence-leaning Democratic Progressive Party has consolidated power. Meanwhile, public opinion in Taiwan has soured on Beijing's preferred formula for political reconciliation, the “one country, two systems” policy, in which China rules over Taiwan but allows Taipei some room to govern itself economically and administratively. Taiwan's public became especially skeptical of the idea beginning in 2020, when Beijing abrogated its promise to provide Hong Kong a “high degree of autonomy” until 2047 by imposing a hard-line national security law. In high-level pronouncements, Beijing has reiterated that “time and momentum” are on its side. But beneath public projections of confidence, China's leaders likely understand that their “one country, two systems” formula has no purchase in Taiwan and that public opinion trends on the island run against their vision of greater cross-strait integration.

Taipei has its own sense of urgency, driven by concerns over Beijing's growing military might and the ongoing worry that U.S. support might diminish if Washington's attention shifts elsewhere or Americans turn against overseas commitments. The new refrain from the administration of Taiwan's President Tsai Ing-wen—“Ukraine today, Taiwan tomorrow”—is both a genuine reflection of Taipei's worries about Chinese aggression and an attempt to galvanize support that will extend beyond the current geopolitical upheaval. In other words, the one thing that Beijing, Taipei, and Washington seem to agree on is that time is working against

This sense of urgency is to some extent grounded in fact. Beijing does have a clear and long-held ambition to annex Taiwan and has openly threatened to use military force if it concludes that the door to peaceful unification has been closed. Beijing's protestations that the United States is no longer adhering to understandings on Taiwan are, in some cases, accurate. And for its part, Taipei is right to worry that Beijing is laying the groundwork to suffocate or seize Taiwan. But American anxieties have been intensified by sloppy analysis, including assertions that China could take advantage of the United States' distraction in Ukraine to seize Taiwan by force or that China is operating along a fixed timeline toward military conquest. The first of these examples has been disproved by reality. The second reflects a misreading of China's strategy.

In fact, there is no conclusive evidence that China is operating on a fixed timeline to seize Taiwan, and the heightened worry in Washington is driven primarily by China's growing military capabilities rather than any indication that Xi is preparing to attack the island. According to Bill Burns, the director of the CIA, Xi has instructed his military to be prepared for conflict by 2027, and he has declared that progress on unification with Taiwan is a requirement for fulfilling the "great rejuvenation of the Chinese nation," for which he set 2049 as the target date. But any timeline that has a target date nearly three decades in the future is little more than aspirational. Xi, like leaders everywhere, would prefer to preserve his freedom of action on matters of war and peace and not lock himself into plans from which he cannot escape. China's leadership appears to be spending profligately to secure the option of a military solution to the Taiwan problem, and the United States and Taiwan must not be complacent. By the same token, however, it would be wrong to conclude that the future is foretold and that conflict is inescapable.

Fixating on invasion scenarios pushes U.S. policymakers to develop solutions to the wrong near-term threats. Defense officials prefer to prepare for blockades and invasions because such scenarios line up most favorably with American capabilities and are the easiest to conceptualize and plan for. Yet it is worth recalling that Chinese leaders in the past have chosen options other than military occupation to achieve their objectives, such as building artificial islands in the South China Sea and using lawfare in Hong Kong. Indeed, Taiwan has been defending itself against a wide variety of Chinese gray-zone attacks for years, including cyberattacks, meddling in Taiwan's electoral politics, and military exercises meant to undermine the island's confidence in its own defenses and the credibility of U.S. support. China's response to U.S. Speaker of the House Nancy Pelosi's August 2022 visit to Taiwan underlines China's efforts to erode Taiwan's psychological confidence in its self-defense. After the visit, Beijing lobbed missiles over Taiwan for the first time, conducted unprecedented air operations across the Taiwan Strait median line, and simulated a blockade of Taiwan's main ports.

Although the military threat against Taiwan is real, it is not the only—or most proximate—challenge the island faces. By focusing narrowly on military problems at the expense of other threats to Taiwan, the United States risks making two serious mistakes: first, overcompensating in ways that do more to escalate tensions than deter conflict; and second, losing sight of broader strategic problems that it is more likely to confront. Beijing is already choking Taiwan's links to the rest of the world and attempting to persuade the people of Taiwan that their only option for avoiding devastation is to sue for peace on Beijing's terms. This is not a future hypothetical. It is already an everyday reality. And by hyping the threat of a Chinese invasion, U.S. analysts and officials are unintentionally doing the CCP's work for it by stoking fears in Taiwan. They are

also sending signals to global companies and investors that operating in and around Taiwan brings with it a high risk of being caught in a military conflict.

Another mistake is to presume conflict is unavoidable. By doing so, the United States and Taiwan bind themselves to preparing in every way possible for the impending conflict, precipitating the very outcomes they seek to prevent. If the United States backs China into a corner, for example, by permanently stationing military personnel on Taiwan or making another formal mutual defense commitment with Taipei, Chinese leaders might feel the weight of nationalist pressure and take drastic actions that could devastate the island.

Moreover, unilaterally risking a war with the United States over Taiwan would not mesh with Xi's grand strategy. His vision is to restore China as a leading power on the world stage and to transform China into, as he puts it, a "modern socialist nation." The imperatives of seizing Taiwan on the one hand and asserting global leadership on the other are thus in direct tension. Any conflict over Taiwan would be catastrophic for China's future. If Beijing moves militarily on Taiwan, it will alert the rest of the region to China's comfort with waging war to achieve its objectives, likely triggering other Asian countries to arm and cohere to prevent Chinese domination. Invading Taiwan would also jeopardize Beijing's access to global finance, data, and markets—ruinous for a country dependent on imports of oil, food, and semiconductors.

Even assuming Beijing could successfully invade and hold Taiwan, China would then face countless problems. Taiwan's economy would be in tatters, including its globally invaluable semiconductor industry. Untold civilians would be dead or injured, and those who survived the initial conflict would be violently hostile to the invading military power. Beijing would likely face unprecedented diplomatic blowback and sanctions. Conflict just off China's eastern shoreline would incapacitate one of the world's busiest maritime corridors, bringing with it disastrous consequences for China's own export-driven economy. And of course, by invading Taiwan, China would be inviting military engagement with the United States and perhaps other regional powers, including Japan. This would be the very definition of a Pyrrhic victory.

These realities deter China from actively considering an invasion. Xi, like all his predecessors, wants to be the leader who finally annexes Taiwan. But for more than 70 years, Beijing has concluded that the cost of an invasion remains too high, and this explains why China has instead relied largely on economic inducements, and more recently, gray-zone coercions. Far from having a well-thought-out plan to achieve unification, Beijing is, in fact, stuck in a strategic cul-de-sac. After Beijing trampled on Hong Kong's autonomy, no one can believe that China will solve the crisis in the strait through a policy of "one country, two systems." China's hope that the gravitational pull of its economy would be enough to bring Taipei to the negotiating table has likewise been dashed, a victim of both Taiwan's economic success and Xi's economic mismanagement.

An invasion of Taiwan doesn't solve any of these problems. Xi would risk it only if he believed that he had no other options. And there are no signs that he is anywhere close to drawing such a conclusion. The United States should try to keep it this way. None of Xi's speeches resemble the menacing ones that Russian President Vladimir Putin gave in the run-up to his invasion of Ukraine. It is impossible to rule out the chance that Xi might miscalculate or blunder into a conflict. But his statements and behavior do not indicate that he would act so recklessly.

HOLD YOUR FORCES

Even if Xi is not yet considering forced unification, the United States must still project sure-footedness in its ability to protect its interests in the Taiwan Strait. Meanwhile, military decisions must not be allowed to define the United States' overall approach, as many analysts and policymakers are effectively suggesting they should. The inescapable reality is that no additional increment of U.S. military power that is deployable in the next five years will fundamentally alter the military balance. The United States must rely on statecraft and a broader array of tools to make clear to Beijing the high price of using force to compel unification.

The ultimate goal of a sustainable Taiwan policy should be to preserve peace and stability, with a focus on elongating Beijing's time horizon such that it sees unification as a "some day" scenario. The United States must especially avoid backing Xi into a corner, preventing a situation in which he no longer treats Taiwan as a long-term objective but as an impending crisis. This different approach would entail an uncomfortable shift in mindset for many analysts and policymakers, who see the United States and China as locked in an inevitable showdown and view any consideration of Beijing's sensitivities to be a dangerous concession.

This is not to say that the goal of U.S. policy should be to avoid angering Beijing. There is no evidence that diminished U.S. support for Taiwan would reduce China's eagerness to absorb the island, which is elemental to the founding narrative of the CCP. But this reality means that the United States should bolster Taiwan's prosperity, security, and resilience in ways that don't gratuitously antagonize its powerful neighbor ruled by an increasingly nationalistic leader.

U.S. support should be dedicated to fortifying Taiwan's capacity to withstand the full range of pressures the island already contends with from China: cyber, economic, informational, diplomatic, and military. But critically, the United States must be disciplined in declining Taiwan's requests to provide symbols of sovereignty, such as renaming Taiwan's diplomatic office in the United States, which would aggravate Beijing without improving security in the Taiwan Strait. Similarly, congressional delegations should be geared toward advancing specific objectives to ensure that benefits exceed costs. The United States should channel its support for Taiwan into areas that concretely address vulnerabilities, such as by helping Taiwan diversify trade flows, acquire asymmetric defensive weapons systems, and stockpile food, fuel, medicine, and munitions that it would need in a crisis. It is a comforting illusion that the solution to cross-strait tensions lies in simply strengthening the military capabilities of Taiwan and the United States such that Beijing decides that it must stand aside and let Taiwan go its own way. In reality, Beijing would not sit idly by as the defense capabilities of the United States and Taiwan grow ever stronger. Indeed, the demonstration of U.S. naval power during the 1995–96 Taiwan Strait crisis had the unintended consequence of provoking a wave of new PLA investments that have eroded U.S. military dominance. Current efforts by Taipei or Washington to prepare for military conflict should account for the PLA's predictable reaction.

Any approach to maintaining peace in the Taiwan Strait must begin with understanding how deeply political the issue of Taiwan is for China. It is noteworthy that the 1995–96 Taiwan Strait crisis and the recent spike in tensions over Pelosi's visit to Taiwan were driven by issues of high political visibility—not by U.S. arms sales to Taiwan or efforts to back Taipei in international organizations or initiatives to strengthen bilateral economic ties. The lesson is that the United States has more room to concretely support Taiwan when it focuses on substance rather than publicly undercutting Beijing's core domestic narrative that China is making progress toward unification. Chinese authorities will inevitably grumble about quieter efforts, such as expanding

defense dialogues between the United States and Taiwan, but these remain below the threshold of public embarrassment for Beijing.

Accordingly, U.S. actions should both meaningfully support Taiwan and give Xi domestic space to proclaim that a path remains open to eventual unification. Examples of such efforts include deepening coordination between the United States and Taiwan on supply chain resilience, diversifying Taiwan's trade through negotiation of a bilateral trade agreement, strengthening public health coordination, making more asymmetric defensive weapons available to Taiwan, and pooling resources to accelerate innovations on emerging technologies such as quantum computing and artificial intelligence applications. All such efforts would strengthen Taiwan's capacity to provide for the health, safety, and prosperity of its people without publicly challenging Beijing's narrative of eventual unification.

In addition, the United States must back its policy with a credible military posture in the Indo-Pacific, placing greater emphasis on small, dispersed weapons systems in the region and making larger investments in long-range antisurface and antiship missile systems. Such investments could bolster the United States' ability to deny China opportunities to secure quick military gains on Taiwan. And if the United States sends weapons in a low-key manner, it will frustrate Beijing but leave little room for China to justify the use of force as an appropriate response. In other words, the United States should do more and say less.

The United States should also resist viewing the Taiwan problem as a contest between authoritarianism and democracy, as some officials in Taipei have urged. Such a framework is understandable, especially in the wake of Russia's disastrous invasion of Ukraine. It is easier to convince Americans of the value of a safe and prosperous Taiwan when contrasting its liberal democratic identity with Beijing's deepening autocratic slide. Yet this approach misdiagnoses the problem. The growing challenge to maintaining peace in the Taiwan Strait stems not from the nature of China's political system—which has always been deeply illiberal and unapologetically Leninist—but from its increasing ability to project power, combined with the consolidation of power around Xi.

Perhaps more troubling, this approach boxes Washington in. If the United States paints cross-strait relations with bright ideological lines, it will hinder U.S. policymakers in making nuanced choices in gray areas. As American game theorist Thomas Schelling demonstrated, deterring an adversary requires a blend of credible threats and credible assurances. The assurance requires convincing Beijing that if it refrains from using force, then the United States will hold off on supporting Taiwan's independence. When U.S. policy on Taiwan becomes infused with ideology, the credibility of American assurances diminishes, and the United States' willingness to offer assurances to China becomes proscribed. Taking Beijing's concerns into consideration may not fit the hawkish Zeitgeist in Washington, but this type of strategic empathy is imperative for anticipating an opponent's calculus and decision-making.

Framing tensions as an ideological struggle risks backing China into a corner, too, because it feeds Beijing's anxieties that the United States will stand in permanent opposition to any type of resolution to the Taiwan problem. This, in turn, might lead Beijing to conclude that its only choice is to exploit its military strength to override the United States' opposition and forcibly subsume the island, even at significant economic and political cost. Any Chinese leader would consider Taiwan's escape from China's grasp an existential loss. Biden's comments in September 2022 that the United States would come to Taiwan's defense if China were to launch

an “unprecedented attack” have again sharpened the debate on whether U.S. policy is shifting toward a clearer articulation of when and how it would intervene on Taiwan’s behalf. Yet this debate over “strategic clarity” is a distraction. For one thing, the Chinese military already assumes that the United States would intervene if China were to launch an all-out invasion, so from Beijing’s perspective, U.S. involvement is already factored into military plans. Moreover, in the absence of a mutual defense treaty between the United States and Taiwan, which is not on the table, there is no binding requirement for Washington to intervene, even if a president has suggested that it should do so. What’s more, an outright and unprovoked invasion by the PLA is the least likely scenario the United States will encounter, and so the way in which the United States responds to Beijing’s aggression would inevitably depend on the specific circumstances of a Chinese attack. In this sense, the very idea that “strategic clarity” is “clear” is a myth.

More important than rehashing a decades-old debate over strategic clarity is to focus on how the United States’ “one China” policy should be adapted to meet the new and pressing challenges presented by a vastly more powerful and aggressive China. Simply stating that U.S. policy has not shifted, as the White House did following Biden’s remarks, rings hollow to Beijing and to any honest observer of U.S. policy over the past six years.

BALANCING ACT

Rather than perpetuate the fiction of constancy, the United States should tell the truth: its decisions are guided by a determination to keep the peace in the Taiwan Strait, and if Beijing intensifies pressure on Taipei, Washington will adjust its posture accordingly. And the United States should pledge that it will do the same if Taiwan pursues symbolic steps that erode cross-strait conditions. Such an approach would recognize that the status quo in the Taiwan Strait is dynamic, not fixed. It would recognize Beijing’s agency in either sustaining or undermining peace. Washington should make it clear that if Beijing or Taipei upsets stability in the strait, it would seek to reestablish the equilibrium. But for such an approach to work, the actions and intentions of the United States must be clear, and its commitment to this equilibrium must be credible.

The United States should be firm and consistent in declaring that it will accept any resolution to cross-strait tensions that is reached peacefully and in accordance with the views of Taiwan’s people. If Xi wants to find a peaceful path to unification, which he and other Chinese leaders still stress is their preference, then he must sell this option to Taiwan’s public. The truth is that such a reconciliation may not come for decades, if ever. But it is nonetheless worth pursuing a peace that allows Taiwan to grow and prosper in a stable regional environment, even if such a goal does not have the sense of finality that many American analysts and policymakers crave.

After half a decade of deterioration, the U.S.-Chinese relationship stands at the edge of crisis. Bilateral frictions have moved from trade to technology and, now, to the threat of direct military confrontation. To be sure, Beijing’s threats toward Taiwan are the fundamental cause of the tensions across the strait. But this blunt fact only serves to highlight just how vital it is for the United States to act with foresight, resolve, and dexterity. A direct confrontation between the United States and China would wreak devastation for generations. Success will be measured by each day that the people of Taiwan continue to live in safety and prosperity and enjoy political autonomy. The fundamental objectives of American efforts must be to preserve peace and stability, strengthen Taiwan’s confidence in its future, and credibly demonstrate to Beijing that

now is not the time to force a violent confrontation. Achieving these objectives requires elongating timelines, not bringing an intractable challenge to a head. Wise statecraft, more than military strength, offers the best path to peace and stability in the Taiwan Strait.

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