

Uncorrected Transcript: Check against Video for Quotes

QI Panel:

Preventing Taiwan War: Is Strategic Ambiguity Still Working?

October 21st, 2025

12:00 - 1:00 PM ET

Jake Werner 0:33

Hello everyone. Thanks for joining us today, and welcome to this Quincy Institute discussion on how to prevent war over Taiwan, with a particular focus on the question of whether strategic ambiguity is still a viable framework for US policy. My name is Jake Werner. I'm the director of the East Asia program at the Quincy Institute. Quincy is a transpartisan think tank that promotes ideas moving US foreign policy and national security strategy away from global domination and militarism and toward diplomatic engagement and great power peace.

The question of Taiwan is, of course, at the forefront of these issues, because it is the single most likely cause for the world's two superpowers to enter violent conflict. So the discussion, the stakes of this discussion, are very high, and we have a range of views to to get different perspectives on what the United States should be doing and how to understand the trends in the US China relationship around the issue of Taiwan. Ever since the Nixon opening to China, the US and China have maintained a tacit understanding about how to avoid war around Taiwan. China continues to claim Taiwan as a core part of its sovereign territory, and as such, it refuses to renounce force to achieve unification, but it says it prefers a peaceful path to unification, and has tolerated Taipei's continued autonomy for decades now.

The US, for its part, acknowledges this position, acknowledges this position as that of all Chinese on either side of the Taiwan Strait, and does not challenge that position. It maintains only unofficial relations with Taipei, but also asserts an interest that any change in the status quo be peaceful in nature. And this is the substance of strategic ambiguity. The US wants to leave Beijing guessing whether it would enter any conflict over Taiwan militarily, this tacit agreement has held the peace on this potentially explosive issue for over 40 years now, but the foundations of that agreement have been steadily eroding on all sides over the last decade, raising very serious questions about where we're heading and how we should adjust to the new conditions.

That is the place that we're going to focus in this discussion today, and I'm very pleased to welcome three experts. I don't think the this panel could be any better than it is right now, all of whom have written extensively on the question of Taiwan and US China relations. We have Michael Swaine, who is a senior research fellow in the Quincy Institute's East Asia program. He is the author of two recent Quincy Institute briefs on this question Taiwan. The first one is called Taiwan: An Important but Non-Vital U.S. Interest, and the second one, Beyond Strategic Ambiguity: Supporting Taiwan Without a Commitment to War. So we'll have Michael explain the positions outlined in those briefs during the discussion. Then we have Eric Heginbotham. He is

Uncorrected Transcript: Check against Video for Quotes

a Principal Research Scientist at MIT Security Studies Program and the co director of SSPs War Gaming lab. He is the co author of a detailed recent report lights out war gaming, a Chinese blockade of Taiwan. And then we have Bonnie Glaser, who's the Managing Director of the German Marshall fund's Indo Pacific program. She's also the host of the wonderful podcast China global, and is a co author of the book US China, US Taiwan relations. Will China's challenge lead to a crisis we're going to have a structured discussion of these issues for the first part of this webinar, and then I'll leave time at the end for any audience question and answer.

So if you have a question, please just throw it in the Q and A box, and I will come back to them towards the end of the discussion. So welcome all three of you. Thank very, very glad to have you with us. The first question I want to kind of set a baseline here. I want you to tell us what you think the nature of the US interest in Taiwan is, is it primarily military? Is it about us, credibility and alliances? Is it about access to semiconductor chips, which is a very significant focus of recent attention on Taiwan, or is it primarily a question of democracy and human rights or something else? So I'll ask you, you all to sort of outline a very quick version of your answer to this question. We. Won't, I won't ask you to go into detail, because then we would just have one question, and we would have to wrap up at the end of that. But we'll, we'll sort of unpack some of the ideas that that you outline here. Let's start with Michael. What is the nature of the US interest in Taiwan?

Michael Swaine 5:18

Thank you very much, Jake. I really appreciate it, and really a pleasure to be here with Eric and Bonnie. I think the American interest in Taiwan is strong. Taiwan's been a long standing democratic partner of the United States. It's not a formal security ally of the US, but it has been close to the United States. We've had very strong relations with Taiwan for many, many years, particularly since it became a democratic entity after the authoritarian leadership of Chiang Kai Shek for years after he moved to Taiwan from the mainland. So we have close ties with Taiwan, and we certainly don't want to see Taiwan end up in a war across the Taiwan Strait that would have huge, huge impacts on Taiwan and many, many, many other entities as well, but particularly on Taiwan. So we have an interest, and we've stated that in the Taiwan Relations Act to maintain peace and stability in the western Pacific, in the Asia Pacific, and Taiwan is a critical part of that. So United States has a real interest in avoiding war across the Taiwan Strait and in supporting Taiwan as a democratic friend, and certainly not jettison Taiwan and throwing it under the bus or otherwise sacrificing Taiwan.

So there is a there is a strong interest there, but it isn't it is a limited interest. In my opinion, Taiwan is not what I would call a vital American interest. And I define a vital American interest as an interest over which the United States would be willing to engage in a major conflict with another power. In this case, it would be China, another nuclear power with very large military capabilities, particularly around Taiwan. I don't believe that Taiwan justifies that notion as a vital interest. I don't think that Taiwan is strategically vital for the United States in its overall defense position in the western Pacific. I don't think Taiwan is a critical entity to measure American credibility with its allies in the western Pacific, and I don't think Taiwan is a has a superseding

Uncorrected Transcript: Check against Video for Quotes

moral connection, or produces a moral imperative for the United States to be defending Taiwan when the alternative is to get into when it could involve getting into A war with China that could lead to the loss of significant amounts of life in the US, Taiwan and China for an interest, as I say, that is not vital. So the moral imperative to me is, is avoiding the the the loss of life over this issue for the United States, while supporting Taiwan to a maximum degree possible without entertaining us, direct intervention. Sorry, that was probably longer than you wanted.

Jake Werner 8:11

I'm glad that you kept it that short. Michael, just just one quick follow up. The someone in the chat has asked, Justin Leopold has asked, What would an example of a vital interest be, according to your doubt? According to your definition?

Michael Swaine 8:25

Oh, a vital interest would be if Taiwan was absolutely critical to the overall defense posture in the United States and the Western Pacific. And some people make that argument. They say, if Taiwan were to come under Chinese control, the Chinese would then have a decisive advantage in their military situation in the region to threaten the overall US defense posture in Asia and its allies and its formal allies, most importantly being Japan, which is nearest to Taiwan, and then South Korea and the Philippines. So if you lost Japan, Taiwan, pardon me, the argument would be, it's kind of like a domino effect. You would undermine your position and your ability to defend yourself in the region, and you would open up your allies to attacks from China if they were to seize Taiwan. And I just think all of those arguments are not very strong. Great.

Jake Werner 9:16

Thank you, Michael, I'll turn to Bonnie now, Bonnie, can you give us your response on that, what's the nature of US interest in Taiwan?

Bonnie Glaser 9:25

Well, thank you so much for including me in the conversation. And I think Michael's work on on this question is very thought provoking. I actually think that several of the reasons that you mentioned Jake in your in your question really do make Taiwan a vital interest. I don't particularly want to distinguish between vital and important and get into these definitions, but it is. It is very difficult to argue that Taiwan, which produces 92% I believe of the most advanced chips in the world is not vital to every advanced industrialized country, not just the United States. And of course, some people would say that is a reason for moving some of that fabrication capability outside Taiwan, which is taking place, but my understanding is that by 2032 Taiwan will be producing only 20% of its total manufacturing chips outside of Taiwan. So that's including Japan and Germany, the United States, and actually Nanjing as well.

Uncorrected Transcript: Check against Video for Quotes

So I think there's just two more points I'd like to make quickly. One is that I think the US really has an interest in preventing a PRC takeover of Taiwan through force or coercion. That is not the same as an interest in Taiwan's continued autonomy, because I would frame it as preventing a PRC takeover through force or coercion. So the US interest really has long been defined as focusing on the process, not on the outcome, although that is not always made clear, but is the process by which the differences between the two sides of the strait are resolved. Last point that I want to make, I think, is the most important one, and that is the credibility of the United States and our alliances.

And I want to note that, Michael, you make the point in one of your briefs that the US has a vital interest in maintaining its security commitments to Tokyo and Seoul, and you say that the US Japan alliance is central to America's ability to ensure a stable and prosperous Asia that is open to US economic and political engagement. So that's a quote, and I would argue that for Japan, Taiwan is existential. Its geographical location is extremely close to Japan. So if the Taiwan were to fall under PLA control, the westernmost Island, Yonaguni, is about, I think, 110 kilometers away from Taiwan. So that would essentially encircle Japan's southwest island chain and make all of those islands very vulnerable to attack from multiple directions. The PLA would have air and naval dominant dominance around the island chain, and I think the SDF would then face enormous challenges reinforcing their forward positions from the mainland. And then, of course, there's the issue of how dependent Japan, Sea and Sea trade and energy supply is on the waters near Taiwan, and the PLA could then threaten to cut off those vital sea lanes for Japan. So I think in the minds of the Japanese, this is incredibly important.

And if the United States were to say, as you advocate, that we will never come to we will never send military forces to defend Taiwan, that that could end up really destroying, ultimately, our alliance with Japan, and you state that Japan may, in fact, support a US policy that rules out going to war with China while seeking to prioritize and bolster America's existing political defense ties with them. I would challenge you on that, but Eric knows a lot about Japan, so I'm going to turn this over to him and say, do you agree with that statement, and do you agree with my analysis? And I think this is an important component of how important Taiwan is to the United States. Thanks.

Jake Werner 13:55

Thanks, Bonnie. And indeed, we'll come to Eric here in one second. I just, I just wanted to kind of come back and highlight the point that you made, because this is it has been important to the understanding that the US and China have had, and to the policy of strategic ambiguity that the US has practiced, is that the US, very clearly, formally, does not have an interest in the permanent or continued autonomy of Taiwan. If the US were to say that it would de facto be demanding a permanent break from between Taiwan and mainland China, and that would be unacceptable to Beijing so the as you emphasize, the US has an interest in the process being peaceful, and the US, at least formally, would accept unification between Taiwan and the mainland if it were done in a peaceful way. And the Beijing's increasing lack of confidence that the United States continues to believe such as that thing is one of the

Uncorrected Transcript: Check against Video for Quotes

contributors to the erosion in in this tacit agreement. But yes, I think that's a very important point, and it can be easily lost in these rather technical or rather for outsiders, many, many, many people in the audience probably have, have not spent years examining this question like the three panelists have, but it is worth flagging some of the complexity of the US position and why that has worked in the way that it has up to this point.

Bonnie Glaser 15:32

I could just add one sentence, and I believe that Michael agrees with this, is that it is important for the United States to keep that door open of so that China doesn't believe that the United States is is completely opposed, under all circumstances, to reunification. I've written that in my own writings, and I think it is important for Taiwan as as well to keep that door open, right.

Jake Werner 16:01

Okay. Welcome to Eric. Now with this question, what do you think about interested in your thoughts on Bonnie's comments, and broadly speaking, how do you see the US interest in Taiwan?

Eric Heginbotham 16:11

So thanks very much for including me in the panel. I've benefited from Michael's expertise and commentary for many years, and continue to do so, and it's a credit to him that he's invited at least a couple of panelists who don't fully agree with his position, and he knows that. So you know, kudos on the approach here to have a more interesting and maybe messy discussion. I'm going to agree with Bonnie here and the distinction between our interests in having, you know, in the status of Taiwan and its autonomy, vis a vis the way in which the issue itself is resolved. Michael's already stipulated we have important interests in Taiwan. I'm going to agree with that. Bonnie has alluded to TSMC and its role in the semiconductor industry. I would just add to that that it's not just, you know, TSMC as a sole sort of manufacturing base. TSMC is tightly integrated with the global economy, so a lot of the design for chips occurs elsewhere. The United States supplies the machinery for those chips TSMC, yes, it's factories, but it's much more importantly, it's knowledge know how and process, which really, you know, is very difficult to replicate, and you know, may not continue to exist in its present form if ownership of Taiwan changed hands.

So we have a number of interests there, economic, political, normative. Taiwan is a thriving, vigorous in many ways, model democracy with its e democracy, or digital democracy, which should provide lessons to all of us. Bonnie has alluded to its strategic importance, and I think we'll get into more of that as the conversation evolves. But I did want to really foot stomp the issue of how the Taiwan issue is resolved. So Xi Jinping has stipulated quite clearly his interest in China becoming a great power and being able to pursue great power diplomacy. I um, did I lose you there for a moment? Oh, you're back. You're back. Okay, so we could, we could still hear you though. Oh, okay, you freeze. Okay, very good. So, so you know, she has stipulated

Uncorrected Transcript: Check against Video for Quotes

this interest in in China's status, and that could take, you know, many different forms, right? He's been less clear on what form that status should take. It could take, the form of China being a leader in, you know, efforts at brokering peace deals in the Middle East for Europe, global climate change, the the reform of global institutions.

These are all things the United States has interests in each of these areas. So I'm not saying we should simply concede to Chinese leadership, but I do believe we have an interest in in sort of promoting China's participation, or at least allowing China's participation, and engaging with it in these different areas, and sort of channeling China's energy into what might be more productive areas now, if it finds success in military coercion or the use of military force across the straits, my primary fear in all of this is that China's goals, views, ambitions and behavior could change in ways that Make You know, the rest of this century much less peaceful, and may not reduce the probability that the United States is drawn into conflicts in Asia. So, you know, in that sense, I'm going to disagree that it's not of vital interest. I would though, you know, agree with this distinction between the status of Taiwan and how these issues are. Are resolved.

Michael Swaine 20:02

Could I say a word in response to this? Yeah? Well, first, I mean, I again, if you say China one is a vital interest and you believe that, then you are willing to put at risk significant amounts of American treasure and lives to defend Taiwan. If China were to attack it in a war over Taiwan, you don't believe strategic ambiguity is a bluff, the US could very well intervene directly. So you know, everybody needs to keep that in mind, we would be at war with China, a nuclear power over this island and And my view is that on the tech level, I don't think the tech issue. I think it's in some ways overblown. It is very true that TSMC produces very high end and Bonnie corrected me on this. It's 90% of high end chips. But what do you do about that fact? If you take that fact and you say, okay, Taiwan is producing 90% of high end chips, therefore, if China gains control over Taiwan, we're going to be put at a major disadvantage.

So we need to make sure that Taiwan is kept separate from China. For that reason, that stance by the United States would directly undermine the One China policy. It would basically throw out the window that the United States would be receptive to a use a peaceful unification with Taiwan that was not coercive, we would say no. We would not accept that, because China would gain control over TSMC if it were peaceful unification, and it could use it against us. So I think that is one issue that needs to be considered.

A second issue is, if you defend Taiwan with US defense, it's very likely that TSMC is going to be heavily damaged, if not destroyed altogether, either by warfare, directly or by sabotage to keep it out of the hands of the Chinese. So under those conditions, everybody loses. So the imperative there is definitely to avoid war over TSMC as an as an issue, and the third reason is that TSMC, as as Jake alluded, relies heavily on in TSMC is a fabrication facility. It fabricates high end semiconductors, its inputs, software inputs of various types come from the outside, and are primarily from the United States and Europe. So if China comes in and says it's going to use TSMC as a bludgeon, as a weapon against the United States, the United States could react

Uncorrected Transcript: Check against Video for Quotes

to that by saying, Okay, fine, you don't get TSMC. We don't get TSMC. Both sides would be undermining both of their interests in doing that, which I think would be kind of a stupid move for the Chinese to do, knowing how dependent TSMC is on the outside and that the US and the West have influence over that decisive influence. I mean, the solution, ultimately, I think, is to do what they're trying to do, which is to offshore as much of TSMC capabilities off Taiwan as possible, to simply lower the likelihood that this issue will continue to be a real irritant in the US, China, Taiwan relationship.

And if I could just say a word about Japan, yeah, Bonnie and I disagree on this point for sure. I don't see Japan as viewing Taiwan, Japan as a nation and Japan as a government in any in any policy sense, as viewing Taiwan as critical to Japan's security from a basic existential level, that if Taiwan were lost to China, Japan would be fundamentally threatened. Its existence would be threatened. I don't think that is where the Japanese are. I think there are people in Japan who are making that argument, and that number is growing, but that is not the position of the Japanese government, which is very cautious about this issue, and the Japanese government, under law, are not they don't have the capability to go in and fight alongside the United States unless they thought an attack on the United States in the context of a Taiwan conflict were to threaten Japan's existence, or an existential threat to Japan, and the Japanese have not by any means, reached that kind of a conclusion. And then when you add to that, the Japanese public opinion is very much not supportive of getting directly involved in a war with China over Taiwan, the Japanese public do not view, by and large, Taiwan as the kind of critical location for Japan that some people would suggest.

And the last point I would make is that I don't agree with the idea that Japan would be a domino in Asia. Taiwan would be a domino in Asia if the Chinese gained control over Taiwan. The next step would be the Philippines. The next step would be Japan. I just don't see what the conditions were. Would be under those circumstances where Japan, where China, would feel emboldened to what attack the Senkaku, Yao islands. I just don't see that that kind of incentive would be in place. The Chinese would have resolved an issue that has to do with their territorial sovereignty on a critical issue that they regard as vital to their interests. And the SEC the SD islands, I don't think are that critical, and I think the Japanese have the capability to defend those islands. And so that's where the stress should be for Japan is on defending the Home Islands, not on being involved with the United States or Taiwan in defending the island of Taiwan against China.

Jake Werner 26:12

So I want to come back to Bonnie and get your response to Michael's points. And also, I thought the point that Eric raised was very interesting, that that allowing China to conquer Taiwan would change something about China, that there are sort of different potentials in play right now, and China could go in this direction, it could go in that direction, But the fact of of of seeking to control this territory and succeeding in doing so at very little cost, would tend to develop China in this direction. So I'm interested finding your thoughts about that, but, but also specifically, if you could responding to Michael's point, where do you see the issue with Japan? Exactly, if, if

Uncorrected Transcript: Check against Video for Quotes

the US were to not intervene in the military conflict over Taiwan, would that damage the US Japan relationship, or would it? Would it really put Japan into such a difficult military position after the outcome of the conflict that it would make the that it would significantly disadvantaged the United States defense posture. And so just a little bit more detail on what you're seeing around the issue in the Japan alliance.

Bonnie Glaser 27:29

So on the US Japan alliance, I don't know that it makes much sense to go into this in any greater detail. I think we maybe we talk to different people, maybe we have access to different kinds of information, but I already made my case. I think it's the Southwest islands, whether you're talking about Yonaguni or Shigeki, the ability of Japan to defend their islands would be extremely challenged, and I believe that there would be greater incentives for Japan to go nuclear. I think that the over, it would be the beginning of a process of essentially eroding very it could be gradually, could be quickly, the US alliance with Japan. So ultimately, Michael says in his briefs, the alliance is vital. I believe it would ultimately inflict unacceptable damage to that alliance. So we'll set that aside. We can agree to disagree. I think it's pretty fundamental.

I want to I will comment on your other point very briefly that Eric raised and Michael has commented on so I do not use the argument of a domino effect, but I describe it differently. For China, military force has been a very small part of Chinese foreign policy for many years, right? The last time there was a major use of force was against Vietnam in 1979 that didn't pan out too well for China. And so whether we're talking about threat of force or use of force, we have seen very little. Now, in the case of Taiwan, we are seeing much more threat of force as demonstrated in the last couple of years.

But my argument would be, and probably leaning more towards Eric's stance than Michael's, is that if China is successful in using force and taking Taiwan, that it will tend to include consideration of using force in other scenarios. Going forward, the PLA will become more influential in decision making. The fact that they have actually developed this very capable military and then demonstrated that they were able to successfully use it to achieve political objectives would definitely mean that as they consider their options in other scenarios, whether it is against Japan or India or the Philippines or other countries, that the role of threat of force and use of force would become more prominent in Chinese foreign policy and I think that's different than the domino theory.

Jake Werner 30:26

Thank you. I want to come to some of the some of the military questions that are raised in this discussion, Michael, part of the argument you make for moving beyond strategic ambiguity is simply that the military balance is turning against the United States quite decisively that China, by its geographic location and by its increasing military capacities, is now in a position to to make any kind of military conflict over Taiwan extremely damaging for the United States, and

Uncorrected Transcript: Check against Video for Quotes

make it unlikely that the United States would succeed. Can you, can you expand on that, the argument you make around that? And then, and then I'll come to Eric and listen to his response.

Michael Swaine 31:09

Happy to I mean, I, I'm not as deeply steeped in the military as Eric is, but I do follow it quite closely, and I read a lot of the analysis and the analysis that I read, including some by Rand and by Eric, suggests to me that there is a trend that in critical areas where the United States in the past had clear superiority, it has it is losing those superior levels, or has lost them entirely to the Chinese, and they are very relevant to a Taiwan scenario. They include missile force capabilities where Chinese have enormous numbers of missiles that can range Taiwan, range, Japan, range the Philippines. They have both land and naval anti access and area denial capabilities based on these missiles and cruise missiles. They have improved their navy. They have a much more modern Navy today, with more sophisticated surface combatants than they've had in the past. They have a greater capability to deploy fifth generation aircraft across the Taiwan Strait than they've ever had. They have a very strong ability in an anti air defense capability across the Taiwan Strait, which they've had for years, but they've increased it even further, and they're now increasing both space and counter space capabilities as well as information warfare and logistics.

Now many of these were part of the scorecard that Eric had in his study. It ran which showed a real shift away from a US dominant position on these scorecard, scorecards of these capabilities, to one where the United States, US has lost a lot of them, and the Chinese, in fact, has increased in in several of these areas. So the shifting capabilities, I think, is there. I think it's not very likely that some kind of technical silver bullet is going to come along that's going to reverse all that. There's been an argument that drones by the United States is going to be the key element that could really reverse the kind of slide we're seeing in relative capabilities around the Taiwan Strait, but the Chinese are as good, if not better, than the Americans, in producing drones, and could conceivably counter those drones with anti drones of various types.

So it's not as by any means, as clear a sense of superiority as some people had thought in the past, and I just don't see any other technology that's going to come along the line that's going to make up for the deficiencies and the geographic distances that the United States is going to have to cover and cover more effectively in the face of a more capable PLA in the future, and I don't see the Chinese facing a guns versus butter dilemma, even though their economy is not doing as well and their growth rate has dropped. I've spoken with quite a few economists, both Chinese and American, and asked this question. It's one question I often ask, do you foresee a serious guns versus butter? You know, a priority on military versus social welfare? That's going to create a real dilemma for the Chinese are going to have to go with more one or the other. And I've yet to see somebody say that they think that that will be a severe dilemma. Most of them say at most, the Chinese might not be able to ramp up their current spending at significant levels because of increasing demands on the civilian side. But they don't say the Chinese are going to have to reduce, and they're spending around a little under 2% of their GDP every year on their military and as their economy grows and it's still.

Uncorrected Transcript: Check against Video for Quotes

Expect it to grow at least 3% 4% they're going to increase their spending on the military. It's not going to stay static.

So it's a very tough situation that we're facing in the Taiwan Strait, and I think the United States is at an increasing disadvantage in that situation. And the reason why, if I could just add the reason why this is so important is because in the past, we could have a policy of strategic ambiguity, because it was relatively low cost. We could tell the Chinese that we might use our military to defend Taiwan, that they have to be deterred from doing that, and we could lay that out in the Taiwan Relations Act it's a possibility, and there was no cost to it, because the Chinese had no real ability to seize Taiwan. Now the situation is fundamentally different. I'm not saying the Chinese have the ability to seize Taiwan tomorrow. I think it would be a major, major conflict with the Chinese. Probably wouldn't be able to seize Taiwan tomorrow, but the cost and damage would be enormous, enormous on all three sides, I believe, along with the danger of possible nuclear escalation. And I think that that situation there, that's such touch and go, but likely the Chinese losing could very well shift in the Chinese direction over time, and that gives the Chinese more confidence. It lowers their risk calculus.

And if you've got a continued Sino-U.S. rivalry that is on the verge of adversarial relations, where distrust is very deep, and you have a weak crisis management system in place, which is exactly the case today, this dynamic could really move in the direction of a real crisis or a conflict in the future, and one that the United States will not necessarily be confident that it would prevail in. So that changing situation, along with the military capabilities, the the and the pulling of Taiwan into the center of the strategic competition between the US and China. All these things are moving towards an increased possibility of a crisis over an issue that I believe is not absolutely vital for the United States.

Jake Werner 37:14

So what I'm hearing you saying, Michael, is that before strategic ambiguity as an American approach to this issue was a stabilizing approach, but increasingly it's contributing to instability in the relationship and that and it's sort of caught up with all of these other considerations that you're raising, but ultimately moving away from strategic ambiguity in the way that you spell out would would be in service to a restabilization of the relationship, is that, is that right?

Michael Swaine 37:43

Well, that's not exactly right. I would say that the the erosion of the efficacy of strategic ambiguity is increasing the possibility that the China, the United States, could be involved in a war with China over Taiwan. It's increasing that possibility. And so by looking for an alternative strategic stability, what you're trying to do is create a situation where you can still protect and defend and support Taiwan in many different ways, economic, military, political, short of the US directly committing itself to injecting forces into the situation. So it's a support for Taiwan, but it's one that balances against the idea of U.S. direct, US intervention. Now, if you call that greater

Uncorrected Transcript: Check against Video for Quotes

stability, we could discuss what that means, but the main purpose of that is to avoid a war between China and the United States over that island.

Jake Werner 38:44

Okay, great, Eric, I want, I want to get your thoughts on the military questions that Michael has raised here, if you could address there's one question from the audience, from Donald Liebich, he says very directly, when we war game conflict with China, who wins? So that's and you have extensive experience War Gaming conflict with China, so I'm interested in your response to that, but more broadly, also on the issues that that Michael raises. How do you see the military balance between the US and China around Taiwan changing and kind of what, and what does that? How do you think about the consequences, the implications of that for for what our approach should be towards strategic ambiguity? Thanks.

Eric Heginbotham 39:31

So I'll start off with a caveat. Maybe not a good idea, but, but just because one follows military affairs doesn't mean one has the answer right or the right answer. Fortunately, we don't have a test of what high end major power, you know, direct confrontation looks like. And hopefully we won't get clarity on that question. And then, before I launch into any detailed sort of military questions, I do want to step back for just one moment and say, you know, yeah, we're taking. A risk here on the possibility that we could be involved in an extraordinarily costly war. It would be my position that those risks are low in absolute terms and lower if we maintain the current course, you know, as as adjusted over time as circumstances need.

But in other words, if we, if we maintain strategic ambiguity and adapt it as circumstances require, rather than, and obviously, I know Michael would not describe it this way, but rather than retreat from from our historic commitments to Taiwan. So, you know, we've already, sort of, you know, circled around on some of these questions. This is an area where where people can certainly disagree. I think Bonnie and I disagree with with Michael on this now on the military questions, more narrowly, just a few general points.

First of all, the United States has always enjoyed aggregate, sort of an advantage in aggregate military resources over China. That that remains true today. So China has narrowed that gap over time, over the course of three decades, as it's modernized its forces, but the United States maintains significantly superior capabilities, both qualitatively and in terms of of numbers as well. So we've got like, two and a half times the number of VLS cells, vertical launch cells, which is a good measure of naval power. We've got a heck of a lot more submarine capability. We have more combat aircraft, especially if you include our Navy. So China has, you know, modern capabilities across all domains. It has increased the number of its modern systems. So again, it's narrowing that capability, but has not closed the gap.

Now Michael referred to the tyranny of distance, which is certainly true. So military power attenuates over distance, and we're 1000s of miles from at least the continental United States is

Uncorrected Transcript: Check against Video for Quotes

1000s of miles from China. So that mitigates or diminishes us aggregate advantage. On the other hand, if we look at specific scenarios, which is how you really do have to assess military balances, China's tasks would be more difficult in conflict. You know, it has sort of the onus of the offensive, either an invasion, which, you know, an amphibious invasion, extraordinarily difficult, right? So that mitigates Chinese capabilities or attenuates Chinese capabilities. Blockade may be less difficult, but also difficult. It imposes all kinds of challenges to maintain that situational awareness to the east of Taiwan and attack both, you know, naval systems and incoming merchant ships.

So, you know, very difficult tasks for China. So yes, this would be, if it kicked off again, I think, a very low probability event, a very costly conflict for the United States. But I don't think, you know, China has extremely low odds of achieving its objectives in any of these scenarios against active us, opposition, and at the end of the day, whether China elects to use force is going to depend a lot more on whether it thinks that can succeed than on whether it thinks it can inflict a lot of casualties against the US, inflicting a lot of casualties against the United States isn't their goal. It's it would be to achieve unification. So if it thinks it can't do that, or if it thinks it's taking a big risk in trying to do that, I think the that you know, the probability that will, that it would embark on that kind of you know, risk is quite low.

Jake Werner 43:44

So is it, is it fair to say that that in your view, if the US were to to to depart from strategic ambiguity in the way that Michael has argued for, that would that would make it more likely that Beijing would seek to take really sharp aggressive action against Taiwan, whether a blockade or an actual invasion?

Eric Heginbotham 44:10

So I think Michael is right, and Bonnie, all of us, I think, would probably agree that China would want to achieve unification peacefully. So military unification is going to carry all kinds of political risks and costs that it's going to want to avoid. So it will seek to do so it will probably increase economic coercion first and then probably combine that with military coercion before it would ever embark on the actual use of military force. But yes, I do think, at the end of the day, it does increase the probability that, you know, we'd see the use of force across the straits in some form or another, and that Taiwan will not be able to resist on its own. I mean, that that would be virtually impossible.

Jake Werner 45:01

Okay, I we're already running short on time, and we've only addressed a small fraction of the issues I had hoped to address. So I want to come back to Bonnie. I want, I want to raise the question with you and feel free to respond to other issues that have been brought up. But how do you think the United States should be acting now to to support Taiwan in order to avoid war. So if so, it seems that you think that strategic ambiguity is still viable. But of course, there are all

Uncorrected Transcript: Check against Video for Quotes

of these dynamics in the US, China and Taiwan triangle that are undermining it. How can we reinforce it or shore it up.

And if we have one question from the audience here, from Paul Heer, how should Washington address the clear gap between its one China policy and the Taiwan DBP government's one China, one Taiwan policy? So that's just one of the kind of destabilizing elements in the in the One China policy, one China principle, strategic ambiguity, this whole set of kind of arrangements that seems to be eroding. Yeah. So just in general, on this question, Bonnie, how, what do you think the US should be doing to to stabilize things, to prevent the terrible prospect of of military conflict over Taiwan?

Bonnie Glaser 46:26

So first, Jake, I want to comment on a couple of things that have been said throughout this conversation. Everybody has referred to strategic ambiguity as US policy. I think I would challenge everybody to find a document official, US government document that says strategic ambiguity is our policy. I don't describe it that way. In 1979 when the United States broke diplomatic ties with Taiwan and and we severed our our mutual defense treaty with Taiwan, we left ambiguous whether or not we would come to Taiwan's defense. And so it has been described by others as strategic ambiguity.

So in fact, yes, the United States doesn't make clear whether it would come to Taiwan's defense. However, I think you will find no one in China, particularly in the PLA who rules out the possibility that the United States would come to Taiwan's defense. In fact, I would argue otherwise, that at least since the mid 1990s the Chinese military has assumed that the United States would come to Taiwan's defense. This is, in fact, they have to take into account their worst case scenarios. So I generally talk about our one China policy. I mean, you know, the the position we we take on, whether or not we would defend Taiwan, is part of that. But I just think your viewers should know that strategic ambiguity is not written in the TRA or any place else. And I think importantly, what what happened is that our policy actually evolved to something that Richard Bush labeled dual deterrence.

So we don't say whether or not we would defend Taiwan or whether and we keep China guessing, so we keep both sides guessing, and that constrains Taiwan, I think, from pushing the envelope, and that is still an important part of of our policy. I do believe that a weak point in your argument, Michael is that you believe that the United States could could adopt a position that the United States would never send military force to defend Taiwan and do this in a gradual way that would not be destabilizing, and that, to me, is unconvincing. I think that altering the US one China policy would be destabilizing if you do so in a fundamental way. And I really believe that you could end up provoking the conflict that you seek to deter, if the United States would simply say we're not going to defend Taiwan. And so I think that's a part of that. Part of your argument, to me, is really not persuasive.

Uncorrected Transcript: Check against Video for Quotes

And for people who argue we should adopt strategic clarity and say, We will defend Taiwan under all circumstances. I also think that could be destabilizing. So I have made that point myself as to what the United States should do to support Taiwan. I think we are taking the right steps to make Taiwan more of the porcupine that the argument that has been put, put out by many people, but, you know, goes back around now several decades, to make it difficult to actually seize and control Taiwan. And we can talk about how difficult it would be for the PLA to actually. Police season control Taiwan. And I agree with both Eric and Michael that China is not confident that it can do so. So part of what we need to do is to make sure that China continues to assess the risks are too high, that the possibility exists that they lose, that they fail to take Taiwan. And no, as Eric said, No, Taiwan can't, can't do that itself.

So the United States should, in fact, continue to help Taiwan to prepare itself. We must also have the ability to credibly defend Taiwan. And again, I realize that's not part of your argument, but it's certainly part of mine, and one that I made, along with Tom Christensen and Jessica Chun Weiss in an article that we published in Foreign Affairs A while back, which looked at assurances in the role of in deterrence, and we argue that they are extremely important, and yes, I could articulate many assurances that we could make, but we must also, not only have credible assurances, but also credible threats. And if we abandon those credible threats, then I think we are ultimately undermining stability in the region.

So there's many things that we should be doing. We should be refraining, US officials should be refraining from making statements that suggest, as Michael said, that US security requires Taiwan remaining separate from China. We should keep the door open for unification that should be left up to the people of Taiwan, but they should not be coerced into accepting something that they don't want to accept. U.S officials should raise concerns with Taipei about any statements or actions that appear to be aimed at pursuing independence. So I think those are things that Michael and I and probably Eric would agree on there we should have a more proactive diplomatic component of our policy of managing cross strait stability, and I believe that that is absent today.

Jake Werner 52:13

Yeah, great. Thank you. Bonnie, yeah, I'll come back to you. Michael, same question for you. Of course, your your position here is that we need to move beyond strategic ambiguity and make clear that the US would not become militarily involved in a conflict over Taiwan. But that certainly does not mean that we should stop supporting Taiwan in other ways, and you argue for actually expanding the ways in which we support Taiwan. So please feel free to respond to to Bonnie's comments. But also, what, what do you think the United States should be doing now, and how exactly would we move beyond strategic ambiguity in a way that doesn't destabilize the whole situation?

Michael Swaine 52:56

Uncorrected Transcript: Check against Video for Quotes

Well, the first point is that I think Bonnie and Eric understand this. I'm not advocating the United States should the president should wake up tomorrow morning and say strategic ambiguity is dead. I think that without adequate preparation, without adequate messaging, without adequate actions taken by the United States vis a vis Taiwan, vis a vis Japan, vis a vis China, I think it would be, it would pose a real, serious problem if the United States just said strategic ambiguity is done so you have to be able to put in a process of preparation for that eventuality. And I and I describe in some detail in my two briefs and in an earlier piece that I wrote in The Washington quarterly in April about what that preparation period should look like.

And I don't believe, contrary to Bonnie's argument, I don't believe that the end of strategic ambiguity, or dual deterrence, if you want to call it, that would undermine the One China policy. I don't think the one China policy is committed as a policy to defending Taiwan. It has the possibility of doing that. But the Taiwan Relations Act only states that Taiwan is the United States regards Taiwan is important to peace and stability in the region, and I would completely support that, absolutely support important to peace and stability in the region, and that United States needs to be able to sell arms to Taiwan, and it should keep up its own self defense capability. Now that issue, that aspect of it, implies that the United States might actually deploy forces to defend Taiwan, but it's not obligated to do so, not by any means. The Taiwan Relations Act says if Taiwan security is ruled by the president as being under threat, he is obligated to take that issue to the Congress and decide what to do about it. It's not a it's not an alliance guarantee at all.

So I think that you could live with non strategic ambiguity, a non US direct intervention, but you could also have different parts of the policy in place. That would be designed to both reassure Japan and Taiwan and to reassure China and deter China in significant ways which I outline in in the paper, it would have to involve a whole series of actions, including increased support for Taiwan, along with clear opposition, clearer than we have it now to unilateral Taiwan independence. I think the United States should make that statement. It avoids saying that. It says we do not support, but it doesn't say we would oppose, and I think it should just strut out saying we would oppose it if it's unilateral or any other destabilizing actions. The United States should certainly oppose any effort by Taiwan to acquire nuclear weapons. The Chinese would almost certainly find out about that before Taiwan had nuclear weapons in place, and we would be into war, because the Chinese would attack Taiwan if they thought they were trying to put in place nuclear weapons and the US wasn't stopping it. That would immediately precipitate war, in my opinion.

So, you know, I don't think that's going to be a very good option for the Taiwanese by any means. I also think that, in response to Eric's question, that the United States, the Chinese, are not necessarily going to look at conflict with the United States over Taiwan as a function of whether they can prevail militarily in that initial conflict. They are going to look at you can have a situation where the Chinese feel they are backed into the corner domestically because of the implications for the legitimacy of their government by an action that the United States might take towards Taiwan that would absolutely undermine the original understanding that China had with us regarding Taiwan and the Chinese backed into a corner, in my estimation, of my belief, would

Uncorrected Transcript: Check against Video for Quotes

use force in some ways against Taiwan, even if they thought they might lose in the first round of that, because they would make it just a first round, and they would want to follow up with that in the future, and they would want to try again to put pressure on Taiwan.

So I don't think they have a complete calculation of whether they can prevail militarily. It depends on the political context of what the provocations might be in bringing in, bringing the United States in, what the provocations might be and causing the Chinese to use force. I should say so it's a much more complex issue. I would just encourage people to read all of the different conditions that I describe in my brief as to what I think should be done to reassure Japan and to deter China and reassure Taiwan, and do other things to try to reduce the likelihood of war breaking out.

Because the bottom line is you want a policy that is going to provide the maximum amount of deterrence and reassurance directed at all the relevant parties without committing the United States to direct military intervention, and that's going to be a line that you'll have to be able to develop over some time. I think it's possible. I know Bonnie doesn't think it's very likely, but I think it's possible the United States could do this, because in particular, I think the alternative is not good. I don't see the current policy of strategic ambiguity under the trend lines that I've described as sustaining stability across the tiny Taiwan Strait over time, it's going to erode it.

Jake Werner 58:41

Thanks, Michael. We are already almost out of time. I want, I wanted to raise just one more question for Eric that came up in the chat, because I know that Eric has worked on this, and this seems like a very significant issue in this question is, what happens if China uses forms of coercion that are short of war? What would that look like, and what are the implications for this larger argument around strategic ambiguity, for the possibility that China could, for example, execute a blockade or pursue other things. This was a question from Charles Blaha, how to counter gradual tightening on Taiwan, air, naval incursions, economic measures, as opposed to an outright invasion. So give that little space to you, Eric, I'm sorry you'll have to make it short, because we're about out of time.

Eric Heginbotham 59:28

Those are great questions, and those are, indeed, I think, the hardest problems as we think about the military dimensions of potential conflict. So a quarantine could be something short of war where China tries to, you know, impose, for example, a customs regime on Taiwan without actually using lethal force, a blockade is an act of war. I think China would have difficulty, sort of threading that needle and imposing some sort of quarantine, or using the coercive use of military force without. A, you know, facing some sort of escalation that presents it with rough choices. But this is indeed, I think, the type of escalatory problem that the United States should devote some attention to. So I'll leave it at that for now.

Uncorrected Transcript: Check against Video for Quotes

I do want to just say, as my final word anyway, that I'm glad that we came back to some of the big issues and that Bonnie put on the table, the fact that we sort of have three choices here that people are debating, you know, strategic clarity, or more commitment to Taiwan, some version of the current policy, and then this proposal that Michael has put forward. So I want to congratulate Michael for putting forward this position in an intelligent and smart way, and promoting the debate on the issue. Obviously, Bonnie and I disagree with certain elements of it, but I think all three of us agree that they're dangerous to the other side, the strategic clarity and to pushing China. You know, China's back against the wall in ways that make this cross straits situation more dangerous. So I'm sorry. I'll stop there, and thank you again for including me.

Jake Werner 1:01:12

Well, I want to thank all the panelists. This has been a wonderful discussion. We're already out of time, and we could probably go for another couple hours. So there certainly will be follow up to all this. I would encourage everyone in the audience to take a look at the writings of everyone involved here, because they've all been doing detailed work that goes into much greater depth on these issues. And just want to let everyone know that the Quincy Institute does these kinds of webinars and book talks quite regularly.

We have another one coming up next month, November 18, Amitav Acharya will be talking about his new book, *The once in future world order*, with Quincy as executive vice president, Trita Parsi, and we may have newer ones scheduled. The best way to keep up with the events that Quincy is hosting is to go on our website, quincyinst.org and subscribe to our mailing list. You'll get updates regularly. So once again, thanks to all the panelists, looking forward to continuing this debate, hoping very much we don't back anyone's into into a corner, and, and, and, it is amongst the most important issues in the world that we figure out a way to avoid armed conflict in the US China relationship over Taiwan. So thanks everyone to your contributions to figuring out these issues, and have a good week.