Preventing War in the Taiwan Strait

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Principal Findings

What’s new? Tensions are rising over Taiwan. The fabric of political understandings that contributed to cross-strait peace and security for decades has begun to unravel as China’s power and assertiveness grows, competition between the U.S. and China spreads, and the Taiwanese people develop a distinct identity increasingly disassociated from the mainland.

Why does it matter? A Chinese military offensive to take over Taiwan is unlikely in the near term, but conflict risks are rising. Taiwan remains the most likely flashpoint between the U.S. and China. A direct confrontation between the big powers could mean global conflagration, global economic shocks and the potential for nuclear escalation.

What should be done? The parties should assure one another that the political understandings hold. China should reduce its military, economic and political coercion of Taiwan; the U.S. should clarify and uphold its “one China” policy; Taiwan’s next president should seek to resume dialogue with the mainland and strengthen the island’s defence.
Executive Summary

Tensions over Taiwan are rising, raising the prospect of a direct conflict between the U.S. and China that could bring with it global economic shocks and the potential for nuclear escalation. Political understandings that preserved peace for decades are fraying under the pressure of U.S.-China competition, a stronger and more assertive China, and the growth of a Taiwanese identity that sees itself as separate from the mainland. A Chinese invasion of Taiwan is unlikely any time soon, but the risk of conflict is rising. Managing it requires the parties to reestablish a baseline level of trust by shoring up longstanding political understandings. Washington should credibly assure Beijing that it does not seek to keep Taiwan permanently separated from the mainland. Taipei should credibly assure Beijing that it does not seek formal independence. Beijing should credibly assure Washington and Taipei that it has not decided to unify with Taiwan through military force. At the same time, Taipei’s military vulnerability is also an issue: it should develop better defensive capabilities to give deterrence the best odds of success.

Since the U.S. and the People’s Republic of China (PRC) resumed normal relations in 1979, differences over the Republic of China (ROC), or Taiwan, have been managed through a fabric of understandings woven around the notion that there is only “one China”. These have allowed the parties to hold different views without clashing. Namely, China claims Taiwan as a part of its territory while Washington holds that the island’s status is undecided. Beijing prefers peaceful unification with Taiwan, but it has never foresworn using military means to achieve its ends, while Washington insists that resolution must happen through a peaceful process and mutual agreement. These views can coexist because of the core unspoken commitment that each of the big powers will refrain from crossing the other’s bottom line: Washington will not pursue Taiwan’s permanent separation from the mainland, and thus it will maintain only unofficial relations with the island, while Beijing will not pursue unification by force of arms.

But as major-power rivalry intensifies, both sides are attaching higher stakes to the Taiwan issue, and taking firmer postures, raising questions about whether they remain committed to the understandings that for years have helped keep the peace in and around the Taiwan Strait. Washington is anxious over the prospect of a Chinese invasion of Taiwan because Beijing’s military capabilities have grown and its intentions appear increasingly aggressive. But Washington’s behaviour may well be making conflict more likely. As U.S.-China competition ramps up, so, too, do the rewards for U.S. politicians looking to gain votes by talking tough about Beijing. The U.S. has provided unprecedented forms of support to Taipei that makes the relationship look increasingly official. Highly publicised senior-level contact between the U.S. and Taiwan has increased in frequency; cooperation in a range of areas, including security, has deepened. Washington has encouraged its allies and partners to be more engaged on Taiwan.

Concerned with what it sees as Washington’s attempt to create the conditions for Taiwan’s permanent separation from the mainland, Beijing has significantly stepped up its operations in the air and on the seas around the island, straining Taiwan’s lim-
ited military resources. China has also staged unprecedentedly large exercises in which its military has rehearsed the opening stages of an attack on Taiwan, further deepening Washington’s suspicions.

Meanwhile, China and Taiwan – which have never agreed on the status of their relationship – have returned their attention to sparring over differences that were once set aside in favour of working together on shared interests. On one hand, a stronger Beijing has become increasingly intolerant of the persistent failure to resolve Taiwan’s status in a manner satisfactory to China. Beijing emphasises that Taiwan’s return to the mainland is a core element of its national objective to restore China’s place at the top of the global hierarchy, and the Chinese military continues to develop the capabilities it needs to be ready for a Taiwan contingency.

On the other hand, the Taiwanese public and political leadership has grown more sceptical of China’s intentions, and mainstream opinion appears steadfastly uninterested in unification with the mainland. In 2016, Taiwan’s Democratic Progressive Party (DPP) swept into power, in part, because of popular unease with the Kuomintang (KMT) party’s conciliatory approach to China. It is favoured to win a third presidential term in 2024. The DPP maintains that Taiwan and China are separate entities, and not part of a single “one China” – a position that clashes with Beijing’s view that Taiwan is one of its provinces. DPP leaders have not accepted the formulation that China uses to characterise the relationship – although they offered a framing aimed at meeting Beijing part way.

In response to the DPP’s position, Beijing cut off cross-strait dialogue, deepened Taiwan’s international isolation, including by picking off its diplomatic allies, and punished the island economically, leading the DPP government to believe that Beijing is no longer willing to be pragmatic over longstanding differences. The DPP government has held a line that Beijing sees as defiant, asserting that Taiwan is already independent, and expanding the island’s unofficial international relationships. All of the above highlights for Beijing the possibility of the island’s permanent separation.

As the barriers to peaceful unification grow, the risk that Beijing may turn to forced unification has risen. In the near term, the risk that China attempts an amphibious invasion remains low, not least because the chances of failure are non-trivial and the likelihood of major costs near certain. China could instead try to blockade Taiwan to get its way, but the prospect of this course leading to unification is even less clear, and the costs would almost certainly be high in terms of international reaction. Still, coercion remains a key element of China’s approach to maintaining control of Taiwan. The island faces everyday political, economic and military pressures from China that harden social divisions and raise the risk of unintended conflict.

The current trajectory is dangerous, but it is not inevitable that cross-strait tensions will end in war. Slowing the escalatory dynamic among the three major parties will, however, require a renewed effort on the part of each to shore up the framework of understandings that has helped to keep conflict at bay. In particular, the U.S. and China should choreograph a series of reciprocal de-escalatory steps. For its part, China should throttle back some of its military activities in the strait – signalling that an invasion is not in the near-term cards. Beijing will be loath to do so, given domestic incentives to appear tough and to show progress on the Taiwan issue. It will need to have gestures from Washington and Taipei to point to.
At the same time, the U.S. should make a series of political gestures clarifying its fealty to its “one China” policy. It should quietly dial down its public shows of support for Taiwan and clarify that even as it strengthens Taiwan’s self-defence capabilities, there are limits to how far U.S.-Taiwan security cooperation will go. These signals will be important for indicating that Washington does not support Taiwan’s formal independence and that it is not opposed to any peaceful outcome the two sides may agree upon. Public assurances will be difficult for the U.S., given the domestic costs of appearing soft on China, particularly in the lead-up to the 2024 presidential election, and will depend, in part, on the strength of the gestures that Beijing is able to offer.

As for Taiwan, its presidential election in January 2024 presents a window of opportunity to resume cross-strait dialogue. The path is clearer in the case of a KMT victory because the party already has an understanding in place with Beijing. In the event of a DPP victory, the two sides should in the months between election day and inauguration seek to identify a mutually acceptable political formulation of the cross-strait relationship. The new DPP president should offer again the formulation articulated by the current DPP administration in 2016, including that cross-strait affairs should be conducted in accordance with the ROC constitution, which contains a notion of “one China”. Beijing should accept both formulations, given its long-term interest in arriving at an understanding with the DPP, especially since a third consecutive DPP term would be a sign of the party’s staying power.

But given Beijing’s distrust of the party, such a détente between the DPP and the mainland is unlikely in the near term, so an alternative may be required to bring about the beginnings of a thaw in relations. Beijing is interested in showing its domestic audience that it is making progress toward unification with Taiwan; to that end, a new DPP government could identify a list of areas where cooperation could resume and deepen if dialogue restarts, to make clear the incentives for Beijing. The degree to which the DPP can and will want to offer additional gestures, or to realise cross-strait cooperation, will necessarily depend on credible assurances from Beijing that it, too, seeks to improve the relationship, such as a reduction in economic, military and political pressures on Taiwan.

Finally, deterring a military attack on Taiwan requires a restoration of mutual assurances, but it also requires a credible threat that China will be biting off more than it wishes to chew if it pursues invasion. To this end, Taipei will need to adapt its defences so that it becomes clear it will have the capacity to fend off an assault long enough for help to arrive from the U.S., even though the question of whether Washington will send this assistance remains intentionally and appropriately ambiguous. To do so, it should clarify its defence strategy, continue to invest in asymmetric capabilities, improve the quality of training for its forces and enhance the resilience of the civilian population.

While this path will be politically difficult for all the parties to follow, their common interest in avoiding a potentially cataclysmic conflict between two nuclear powers should provide useful motivation. Given the stakes for the parties, and all those around the region and the world who would be affected by such a clash, it is essential that they try.

Taipei/Brussels, 27 October 2023
Preventing War in the Taiwan Strait

I. Introduction

The risk of war over Taiwan has grown in recent years.\(^1\) Should tensions over control of the island spiral into direct conflict between China and the U.S., two nuclear powers and the world’s two largest economies, the impact would fall on a spectrum between profound and cataclysmic. Global supply chains and commercial shipping would be significantly disrupted. Taiwan is dominant in the semiconductor industry – it produces 60 per cent of global output, and over 90 per cent of the most advanced chips – and China’s economy is deeply interlinked with the rest of the world. In 2023, 88 per cent of the world’s large container ships transited through the Taiwan Strait.\(^2\)

A blockade of Taiwan alone – such as presumably would occur before an armed conflict – would result in global economic losses topping $2 trillion.\(^3\) If, following Chinese aggression against Taiwan, the G7 were to impose sanctions on Beijing, they would likely impede trade and financial flows worth $3 trillion, while a complete interruption of China’s trade would cost the world $2.6 trillion, or 3 per cent of global GDP.\(^4\)

At the centre of such a storm would be Taiwan, or the Republic of China (ROC), a self-governing pluralist democracy with an advanced economy and a population of 23 million. Taiwan sits on an island 160km east of the People’s Republic of China (PRC), or China, which is governed by the Communist Party of China (CPC). It is recognised as a state by only twelve UN member states and the Vatican, but it has robust unofficial ties with many countries. Among these, Taiwan’s most important relationship is with the U.S., which is its principal security partner.

Taiwan’s unique political status, which arises from the CPC’s longstanding claim that it is a province of China, has deep historical roots. After the fall of China’s last imperial dynasty in 1911, the Chinese Nationalist Party (KMT) established the ROC and sought to run China as a constitutional republic. The KMT faced challenges to its power, including from Japan during World War II and from the CPC, which envisioned the creation of a Marxist-Leninist socialist state. The resulting Chinese civil war led to the KMT’s defeat and the PRC’s establishment in 1949. The KMT retreated to Taiwan – which the Allies had handed to the ROC to rule after Japan’s surrender.

\(^1\) On the growing risk, see Amanda Hsiao, “China’s Military Activities Near Taiwan Aim to Impress at Home and Abroad”, Crisis Group Commentary, 8 October 2021; Amanda Hsiao, “Avoiding the Next Taiwan Strait Crisis”, Crisis Group Commentary, 29 July 2022; and Amanda Hsiao, “Assessing the Implications of the Taiwanese President’s Trip to the U.S.”, Crisis Group Commentary, 13 April 2023.

\(^2\) Kevin Varley, “Taiwan tensions raise risks in one of the busiest shipping lanes”, Bloomberg, 2 August 2022.


\(^4\) Charlie Vest and Agatha Kratz, “Sanctioning China in a Taiwan Crisis: Scenarios and Risks”, The Atlantic Council, June 2023; and “$2.6tn could evaporate from global economy in Taiwan emergency”, Nikkei Asia, 22 August 2022.
in 1945 – relocating the ROC government to Taipei. Two rival Chinas thus emerged, which have functioned as separate political entities ever since.

Throughout the 1950s, the two sides engaged in hostilities, each seeking to take control of territory under the other’s rule. The PRC controlled the mainland, while the ROC government held Taiwan and the outlying islands of Kinmen, Penghu and Matsu, situated in the Taiwan Strait, off the mainland coast. Two crises erupted, in 1954 and 1958, respectively, during which China attacked the smaller islands. Taiwan repelled the attacks and fortified its position. Following the 1954 crisis, the U.S. signed a defence pact with Taiwan – which at the time it recognised as the sole legitimate Chinese state authority – pledging its support in the event of another mainland attack. In 1958, the U.S. intervened by helping Taiwan resupply its forces, breaking through Beijing’s blockade of Kinmen to do so. It even considered the use of nuclear weapons to prevent the mainland from taking the island.

By the late 1960s, both Beijing and Washington were interested in rapprochement, driven by a mutual desire to counterbalance the Soviet Union. Relations warmed slowly against the backdrop of growing international recognition of the PRC as the official government of China. In 1971, the UN General Assembly voted to hand over representation of China to the PRC in the General Assembly and the Security Council from the ROC to the PRC. In 1972, U.S. President Richard Nixon made a historic visit to Beijing, paving the way for the normalization of U.S.-China relations, which happened in 1979. Taiwan’s status was a key sticking point; ultimately, as a condition of renewing ties with Beijing, Washington ended its official relations with Taipei. For over four decades since then, a matrix of political assurances – reflected in arcane customs, phrases and conventions – has structured the tense but peaceful relations among Washington, Beijing and Taipei. But with China’s rising power, increased U.S.-China competition and Taiwan’s growing sense of national identity, this architecture is under strain, with potentially grave consequences.

This report seeks to lay out the political drivers and manifestations of rising tensions between China, on one side, and the U.S. and Taiwan, on the other, to assess the near- to medium-term risks that Taiwan faces, and to suggest steps that decision-makers in Beijing, Washington and Taipei could take to avoid a conflict in the Taiwan Strait. It relies on the traditional view that effective deterrence relies on a combina-
tion of credible threats and robust reassurance. Threats are necessary to signal the potential costs of taking an undesired action; the U.S. (in adjusting its military posture in the Asia Pacific) and China (in continuing to modernise its military) are both seeking to clarify those costs to one another. But if conflict is to be avoided, then assurances – the primary focus of this report – are just as important as a means of informing the other side that its restraint will not result in an intolerable outcome.\footnote{For more, see Thomas Schelling, \textit{Arms and Influence} (New Haven, 2008).}

The report also notes the importance of bolstering Taiwan’s own defences as part of any credible deterrence strategy.

The report draws upon interviews conducted with sitting and former government officials and scholars in Taipei and Washington, as well as with scholars affiliated with government think-tanks in China. Of the dozens of interviews conducted, only a fraction were with women experts, in a reflection of the gender make-up of the national security policy cohorts in the three capitals. The report uses the PRC and China, and the ROC and Taiwan, interchangeably.
II. Why Tensions are Rising: Straining the Status Quo

A stable peace has held in the Taiwan Strait for decades, due in large part to a series of formulas developed by the U.S., China and Taiwan and revolving around the idea that only “one China” exists in the world, with intentional ambiguity baked into what that term means. Because there is no consensus over what the status quo is, the concept is perhaps best defined as the matrix of understandings that has evolved to sustain non-conflict, including the limits that each party imposes upon itself and the others toward this end. For China, the status quo means that Washington and Taipei do not pursue Taiwan’s de jure independence, so that unification (its ultimate goal) remains viable. For the U.S., the status quo means that China does not pursue unification with Taiwan through military force and Taiwan does not pursue de jure independence. For Taiwan, the status quo means that it maintains its de facto sovereignty and a say in determining its political future.

In recent years, however, these understandings have started to unravel under the pressure of heightened geopolitical competition, a sense of identity in Taiwan that is increasingly politically divorced from China, and a growing belief in Beijing that with strength comes both the right and the requirement to resolve the Taiwan issue on its own terms.

A. Ambiguity, Stability and the Status Quo

There has never been full agreement among the three parties on a definition of the status quo. The understandings between the U.S. and China, though defined in written agreements and legislation, created room for differing interpretations of Taiwan’s status and the type of U.S.-Taiwan relationship that accords with the status quo. The understandings reached across the strait have, for their part, eschewed clarity about the political relationship between China and Taiwan. The parties’ tolerance for ambiguity is why the “one China” formulas have proven durable.

1. Understandings between Beijing and Washington

Three joint communiqués signed in 1972, 1978 and 1982 serve as the foundation of the U.S.-China understanding about Taiwan.11 At the heart of the resumption of relations between the U.S. and mainland China was sufficient – but not total – agreement on the concept of “one China.” While both governments agreed that there was only one China in the world and that the PRC was its sole representative, there remained different interpretations of Taiwan’s status, the process by which that status should be determined and the appropriate level of U.S. military support for Taiwan.

Beijing’s position, under its “one China” principle, is that the PRC is the only legal government of China, and that Taiwan is a part of China. Washington’s “one China” policy, on the other hand, acknowledges – but does not recognise – Beijing’s view that Taiwan is a part of China. Washington’s position is that Taiwan’s status remains

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unsettled; thus, it will not prejudge what that status should be or throw its weight
behind a particular outcome. The U.S. does not support Taiwan’s formal independ-
ence or “one China, one Taiwan” – the permanent separation of China and Taiwan –
but if the two sides were to agree on such an outcome or on unification, then Wash-
ington would not object.\(^\text{12}\) The core of the U.S. position is therefore focused on
the process by which Taiwan’s status is settled and the principle that the parties
should agree upon the outcome peacefully.

At the time Beijing normalised relations with Washington, it vowed to stop shelling
Taiwan’s offshore islands, signalling an end to its policy of “liberating” the “renegade
province” by force of arms; its policy has since been to strive for peaceful unification.\(^\text{13}\)
Nevertheless, Beijing has never ruled out military action as a means of resolving
Taiwan’s status. Further, Beijing’s position is that settlement of the Taiwan question
is an internal matter, in which external actors should not interfere.

As part of normalisation, China sought not only the withdrawal of all U.S. forces
and military installations from Taiwan – which the U.S. had completed by 1979 –
but also an end to U.S. arms sales to Taiwan. This last goal was the focus of a 1982
communiqué, in which Washington stated it intended to gradually reduce such sales
– over an unspecified time frame – and that these would not “exceed, either in qual-
itative or in quantitative terms, the level of those supplied” in the years since normal-
isation. Washington also implied, however, that the reduction was predicated on
Chinese intentions to peacefully resolve the Taiwan issue, leaving room for ambigui-
ity about the extent to which it would honour this commitment.\(^\text{14}\)

2. Understandings between Washington and Taipei

At the same time, the U.S. made commitments that signalled the continuity of Wash-
ington’s backing for Taiwan’s existence as a de facto state, with an implied – but un-
defined – limit to that support.

The unofficial relationship is guided, in part, by the 1979 Taiwan Relations Act.
This act authorises as a matter of U.S. domestic law “extensive, close and friendly”
commercial and cultural U.S.-Taiwan relations, through a non-profit entity called
the American Institute in Taiwan that serves as the de facto U.S. embassy.\(^\text{15}\) It also
makes clear that peaceful settlement of Taiwan’s status is in U.S. interest, highlight-
ing that China’s seeking to use non-peaceful means for unification – including boy-
cott or embargo – would be considered a threat to peace and security in the Western
Pacific and a grave concern to the U.S. Accordingly, the legislation authorises Wash-
ington to provide Taipei with defensive arms and to maintain the U.S. capacity
“to resist any resort to force or other forms of coercion that would jeopardise the se-
curity, or the social or economic system, of the Taiwanese people”.

\(^{13}\) “Message to Taiwan Compatriots”, People’s Republic of China, 1 January 1979.
\(^{14}\) The 1982 U.S.-China communiqué implies this linkage, while an internal memorandum from
President Ronald Reagan that made it explicit, saying “the quality and quantity of the arms provid-
ed Taiwan [would] be conditioned entirely on the threat posed by the PRC.” For the memo, see
\(^{15}\) “Taiwan Relations Act”, American Institute in Taiwan, 1 January 1979.
The relationship is also guided by a set of undertakings that the U.S. made to Taiwan in 1982, just as Washington was also committing to Beijing to gradually reduce its arms sales to Taiwan. At that time, the U.S. simultaneously pledged to Taiwan that U.S. policy had not changed, through what are known as the Six Assurances. Among other things, Washington told Taipei that it had neither set an end date for, nor agreed to consult with China on, arms sales to Taiwan.16

Notably, the U.S. has never committed to militarily coming to Taiwan’s aid should China launch an attack. By maintaining uncertainty about its probable course of action – a position known as “strategic ambiguity” – Washington has hoped to deter Beijing from militarily imposing a solution (by leaving open the prospect of a costly conflict with the U.S.) and Taipei from declaring de jure independence (by leaving open the possibility that it would have to face a much more militarily capable Beijing on its own).

3. Understandings between Taipei and Beijing

Peaceful co-existence between Taiwan and China has relied in large part on a willingness by both sides to preserve a flexible notion of “one China” when describing the relationship – despite the fact that the PRC and ROC have functioned as separate political entities since 1949. These formulas have worked by allowing each side to preserve its view of the respective sovereignty of the PRC and ROC.

Both major Taiwanese political parties, the KMT and the Democratic Progressive Party (DPP), view the ROC as a de facto sovereign state that is not part of the PRC, meaning that neither subscribes to Beijing’s definition of the “one China” principle, by which Taiwan is a province of China. The notion of “one China” is implied in Taiwan’s own constitution, but in the sense that the ROC – not the PRC – represents China, including the mainland territory.17 The KMT upholds this view of “one China”, while the DPP sees it as a relic of Taiwan’s authoritarian past – during which the KMT was in charge. The two parties’ divergent understandings of Taiwan’s relationship to the mainland have meant that the KMT has been amenable to rhetorical nods to “one China”, while the DPP has sought to distance itself from the concept without entirely alienating Beijing. Regardless, for both, acknowledgment of “one China” is conditioned on preserving ambiguity about what it means.

For its part, Beijing believes that the ROC ceased to exist in 1949, at which point the PRC supplanted it. In its diplomacy, China has sought to create the impression that the world supports its version of the “one China” principle, though other countries have a range of positions on “one China”.18 In its dealings with Taipei, Beijing has, at times, shown a capacity for flexibility.

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16 The U.S. also said it would not play a mediation role between Taipei and Beijing or pressure Taiwan to enter negotiations. It said it had neither revised the Taiwan Relations Act nor altered its non-position regarding Taiwan’s sovereignty. “Declassified Cables: Taiwan Arms Sales & Six Assurances (1982)”, American Institute in Taiwan, 30 March 2022.

17 The ROC constitution refers to Tibet and Mongolia as areas the ROC represents.

In 1992, after talks between the KMT – then in power – and Beijing stalled due to differences over the definition of “one China”, the two sides set aside the issue to move forward with discussions on functional matters. Taiwan’s representatives stated that both “adhered to the ‘one China principle’ but they differ from each other on the meaning of ‘one China’”. In response, China’s representatives said both “adhere to the ‘one China’ principle and strive to achieve national unification. However, cross-strait negotiations on general affairs will not involve the meaning of one China”. Though Beijing never explicitly accepted Taipei’s interpretation of “one China”, its decision to proceed with practical cooperation in 1993 implied a tolerance for – if not acceptance of – the existence of different interpretations. This understanding was termed the “1992 consensus” in 2000. Both Beijing and the KMT began referencing it regularly in 2005. Between 2008 and 2016, when the KMT held the Taiwanese presidency, it was the basis of nearly two dozen cross-strait agreements.

On the other hand, the DPP – which was formed in 1986 by a group of anti-KMT political movements – takes the position that China and Taiwan are separate entities and not part of a larger “one China”. From the start, the party saw the KMT’s concept of the Republic of China – and with it, the idea that Taiwan and China are bound together – as an external imposition on a distinct, Taiwanese identity that had already begun to form under Japanese colonialism. At first, the DPP called outright for independence and the dismantlement of the ROC through the creation of a Republic of Taiwan. But, following unsuccessful election runs, the party moderated its stance. In May 1999, it declared that Taiwan was already a sovereign, independent state. In doing so, the DPP skirted the issue of declaring formal independence, thereby aligning itself with mainstream views opposed to provoking China.

For the DPP, even paying lip service to a “one China” framing carries the risk of legitimising the idea that Taiwan belongs to China and, therefore, creating a pretext for Beijing to annex it. The DPP rejects the 1992 consensus, arguing that no consensus was actually reached, since Beijing never explicitly accepted the KMT’s proposition that there are different interpretations, and no document was signed. The party was also not at the table in 1992. But despite its aversion to “one China”, the DPP has, at times, acknowledged the framing indirectly, as will be discussed further in

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19 China and Taiwan held their first political meeting through unofficial organisations that were created to represent the two governments – the Straits Exchange Foundation on the Taiwanese side and the Association for Relations Across the Taiwan Strait on the Chinese side. “Regular Press Conference Transcript: MAC Minister Chen’s Comments on Restoring the Historical Truth of the 1992 Hong Kong Talks”, Mainland Affairs Council, 1 January 2019; and “1992 Consensus: The Key to Cross-Strait Peace and Prosperity”, Mainland Affairs Council, July 2015.
20 In 1993, the two sides signed a series of agreements on administrative issues and future discussions, known as the Wang-Koo talks.
21 The term “1992 consensus” was coined by Su Chi, then the chair of Taiwan’s Mainland Affairs Council, and began to be regularly used after a 2005 meeting between KMT chairman Lien Chan and CPC General Secretary Hu Jintao.
22 For more on the formation of Taiwan’s identity, see Ho Ming-sho, “Desinicizing Taiwan: The Making of a Democratic National Identity”, Current History, September 2022.
24 Ibid.
Section II.C below. The relationship between the DPP and Beijing has, therefore, been much more contentious than that between the KMT and the PRC.

B. Probing the Status Quo

The slippery ambiguity of the status quo has afforded the three parties space to jockey for position. At various times in the last four decades, they have taken actions to push the cross-strait dynamic in a preferred direction, but the status quo has held. Its resiliency owes, in part, to the fact that the parties have shown the capacity for flexibility in order to maintain the status quo’s framework of understandings.

A case in point was China’s reaction to U.S. President George H.W. Bush’s approval of the sale of 150 F-16 fighter jets to Taiwan in 1992. At the time, even some in the U.S. saw this move as a repudiation of Washington’s commitment to limit arms sales.26 Bush’s actual motives were more prosaic: he believed, in part, that the F-16 transfers would help him gain votes for re-election. Beijing reacted with “shock and outrage”, delaying planned talks, but it did not substantively downgrade relations.27 The reasons for its circumspection were likely several. China understood, first of all, that Bush’s decision was driven more by domestic politics than a desire to promote Taiwan’s independence. It was hoping that Bush (a proponent of stronger U.S.-China ties) would stay in the White House, anyway. It also wanted Congress to renew its Most Favored Nation tariff status.28

Another episode began in 1995, when Taiwanese President Lee Teng-hui paid a visit to the U.S. – one that Congress had made politically difficult for the Clinton administration to put off – precipitating a crisis in the Taiwan Strait.29 During the visit, Lee gave a speech in which he emphasised Taiwan’s separate sovereign status, including by calling it a “country” or “nation” multiple times – something even the Clinton administration found provocative.30 In response, Beijing engaged in a significant show of military strength, conducting three sets of exercises between July 1995 and March 1996, including testing short-range ballistic missiles close to Taiwan.31 This muscle flexing was intended to deter what Beijing saw as a clear attempt by Taipei – supported by Washington, in its view – to renege on the “one China” framework. In response, Clinton dispatched two U.S. aircraft carrier groups through the Taiwan Strait, an unprecedented display of U.S. power at the time.

At the same time, the Clinton administration, which was interested in a more stable relationship with China, took steps to reassure Beijing of its continued com-

26 General Dynamics was assembling F-16 fighter jets in the populous state of Texas, an electoral prize. Bush, a Republican, was keen to court voters in Texas because a third-party candidate, Texan business magnate Ross Perot, was expected to chip away at the Republicans’ historical advantage in the state. Romberg, op. cit., pp. 150-154. In the event, Bush lost both in Texas and in the national election.

27 Ibid.

28 Ibid.

29 Both houses of Congress passed non-binding concurrent resolutions expressing support for President Lee’s visit to the U.S. in May 1995.

30 Romberg, op. cit., p. 166.

31 The March 1996 exercises were intended to influence that year’s elections in Taiwan.
mitment to “one China”.32 In a 1998 visit to China, Clinton reiterated what has come to be known as his administration’s “three nos” policy, stating that the U.S. does not support: independence for Taiwan; the idea of two Chinas or one China and one Taiwan; or, the notion that Taiwan should be a member of any organisation for which statehood is a requirement. Even though other U.S. officials had previously laid out these positions, the fact that Clinton did so himself, in a public forum in China, sent a message to Beijing that Washington had been deterred by its shows of military force.33

Still, a third sequence of events took place in the next decade. Between 2000 and 2008, Taiwan elected its first DPP president, Chen Shui-bian, to two consecutive terms. Chen said at the beginning of his tenure that he would pursue a moderate cross-strait policy, promising in his inaugural address that he would not declare independence, modify Taiwan’s constitution, promote a referendum for the Taiwanese people to decide between independence and unification, change Taiwan’s official name, or abolish the National Unification Council (a government agency whose mission was to promote unification with China) or its Guidelines for National Unification.

When, later on, Chen went back on some of these promises to deflect domestic pressures, the George W. Bush administration tried to enforce the “one China” status quo by reining Taipei in.34 For instance, when, in 2003, Chen announced that he would hold a referendum, Bush said he opposed Chen’s efforts to change the status quo while standing next to Chinese Premier Wen Jiabao at the White House, much to Beijing’s appreciation.35 Then, in response to Chen’s talk of constitutional reform and decision to abolish the National Unification Council and National Unification Guidelines in 2006, the U.S. turned down Chen’s request to transit through San Francisco and New York on his way to Latin America, instead offering him refuelling stops in Hawaii and Alaska.36 Beijing remained moderate in its response because of what one commentator has described as its “confidence not only in its own gathering attraction (and clout) for people in Taiwan but also, crucially, in the willingness and capability of the United States to keep Taipei on the straight and narrow”.37

32 Romberg, op. cit., p. 169.
34 Chen’s 2002 shift could be attributed to pressure from hardliners in his party, while his 2006 shift was tied to a desire to win back his voter base in response to low approval ratings. Shelley Rigger, “Notes for the Conference on Taiwan and US Policy: Toward Stability or Crisis? The Role of Domestic Politics: Taiwan”, Carnegie Endowment, date unknown; Alan D. Romberg, “The Taiwan Triangle”, China Leadership Monitor, no. 18, 7 July 2006.
35 Though the referendum did not touch on the question of independence or unification, Washington was concerned that it would change the status quo. Brian Knowlton, “Bush warns Taiwan to keep status quo: China welcomes U.S. stance”, The New York Times, 10 December 2003.
36 Romberg, “The Taiwan Triangle”, op. cit.
37 Ibid.
C. **An Unravelling Status Quo**

As with previous rounds of tensions, the current escalatory dynamic regarding the Taiwan issue has emerged due to heightened anxieties among all the parties that one of the others is no longer committed to the status quo. Unlike in earlier periods, however, the parties are more intransigent and repair work is more difficult: China has become stronger, Taiwanese sentiment continues to disassociate from the mainland and Washington increasingly sees Beijing as a strategic rival. The result is lower trust between Taiwan and China as well as between the U.S. and China.

1. **Beijing and Taipei**

Under President Xi Jinping, Beijing has become more impatient for unification and more willing to use coercion to achieve its goals. Beijing conceives of the Taiwan situation as arising out of China’s past weakness, and its expectations for resolving the Taiwan question have got higher as it has grown stronger. Xi has attached greater strategic importance to Taiwan, describing unification as a necessary step for China’s rise to major-power status in more explicit terms than past leaders have. While Beijing was previously content to prevent Taiwan’s independence, it increasingly seeks to show progress toward unification.

Though China’s demands of Taiwan have grown, Taiwanese people have consistently remained uninterested in unification. De jure independence for Taiwan is a political impossibility at present, as it could come about only through a constitutional amendment that both the legislature and public would have to approve. Neither threshold would be easy to reach. Most Taiwanese do not support formal independence — owing to the attendant risk of a Chinese invasion; they prefer to maintain the status quo they associate with de facto independence. Nonetheless, since the 1990s, more and more people are embracing a solely “Taiwanese”, and not “Chinese”, sense of identity, largely out of aversion to China’s undemocratic political system.

Beijing’s actions have deepened this tendency: its 2019 crackdown on dissent in Hong Kong, in particular, convinced many Taiwanese that China could not be trusted to uphold its assurances of autonomy under a “one country, two systems” solu-
tion. Taiwan’s population has always rejected this formula for unification, which Beijing had previously proposed as a possible conceptual vehicle allowing the island to enjoy some self-rule. In recent years, Beijing made the terms even more unpalatable to Taiwan, suggesting that a “two systems” solution would include little to no political autonomy.

In the face of these trends in Taiwan, Beijing has shifted to a more punitive, unilateral approach to achieving its unification objective that no longer relies on Taiwanese sentiment to change substantially in the direction it favours. Rather, the approach is based on the belief that Beijing can bypass and, if need be, override Taiwanese preferences.

Though relations deteriorated after Tsai’s election in 2016, the genesis of this approach likely has roots in Beijing’s experience with the preceding Ma Ying-jeou administration (2008-2016), during which Taiwanese popular resistance to unification became clear. At one level, cross-strait ties flourished under Ma, producing 21 agreements on issues ranging from economics to the more sensitive areas of judicial cooperation and security exchange. In 2010, the two sides signed their first economic deal, the Economic Cooperation Framework Agreement, significantly lowering trade barriers. For China, these agreements were intended to show Taiwan the benefits of deeper ties. But the effect on the Taiwanese population was the opposite. In 2014, as Ma tried to push through an accord opening the island to Chinese investment in service industries, large protests erupted over concerns that economic integration with China was moving too fast and posed a threat to Taiwan’s political autonomy. Beijing was disappointed that increasing economic exchange did not draw Taiwan closer to the mainland or ease political discussions.

The frustration only grew when, in 2016, Taiwan elected Tsai partly because of her DPP’s greater scepticism about China. Beijing has viewed Tsai with considerable distrust, accusing her of pursuing a path that points toward Taiwan’s independence even if her actions are less provocative than Chen’s. The misgivings stem partly from

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44 According to the 1984 Sino-British Joint Declaration, which laid out the conditions of Hong Kong’s transfer to Chinese rule in 1997, Hong Kong was meant to have an autonomous political and economic system until 2047.


46 In the passages on “two systems”, China’s 1993 and 2002 White Papers on Taiwan said Beijing would not send troops or administrative personnel to Taiwan after unification. That language is absent from the 2022 White Papers.

47 Crisis Group interviews, Chinese scholars, July 2023.


50 In 2010, for instance, Ma rebuffed Beijing’s efforts to start political discussions. Mo Yan-chih, “Wikileaks: China using ECFA to push unification”, Taipei Times, 9 September 2011.

51 Crisis Group interviews, Chinese scholars, July 2023.
Tsai’s background – she had key roles in the Lee and Chen administrations, both of which, at points, characterised the cross-strait relationship as between two states. But the fundamental problem for Beijing is that Tsai has not affirmed the cross-strait relationship that it seeks – that Taiwan and the mainland remain part of a larger “one China”. Her efforts to find an acceptable middle ground have fallen flat in Beijing.

In line with her party’s position, Tsai’s government argues that Taiwan is already an independent country and, therefore, does not need to declare independence. In a reflection of the status quo, Tsai also says the “Republic of China and People’s Republic of China are not subordinate to each other”. Beijing finds both positions unacceptable. Tsai has also refused to endorse the 1992 consensus, though she did offer an olive branch in her 2016 inaugural speech, saying she respected the historical fact of the talks that took place in 1992 and the ensuing agreements. She called the talks an “existing political foundation” that produced a “joint acknowledgment of setting aside differences to seek common ground”. She also said her administration would conduct cross-strait affairs in accordance with the ROC constitution and the Act Governing Relations Between the People of Taiwan Area and the Mainland Area – documents that contain the notion of “one China” – essentially nodding to the framing without explicitly endorsing it.

The formulation was likely as far as Tsai could politically go, given her party’s aversion to “one China” framings. Beijing’s rejection of Tsai’s position – which it called an “incomplete test answer” – was a surprise to her administration, not least because it was preceded by back-channel efforts to set expectations. Taipei had also got early signals from the Taiwan Affairs Office – the Chinese government agency charged with executing Taiwan policy – that Tsai’s remarks had “exceeded expectations”. It remains unclear if Beijing was sincerely open to dialogue, but assessed that Tsai’s gesture was insincere, or never actually wanted to grant her administration the semblance of a normal relationship.

52 Tsai was part of a working group under Lee that produced the “state-to-state relationship” formulation and was head of Taiwan’s Mainland Affairs Council under Chen, who at one point called the relationship “one country on each side”.
53 Lawrence Chung, “Tsai Ing-wen says Beijing must face reality that Taiwan is ‘an independent country already’”, South China Morning Post, 15 January 2020.
54 In Chinese, it is 「堅持中華民國與中華人民共和國互不隸屬」. “President Tsai delivers 2021 National Day Address”, Office of the President, Republic of China (Taiwan), 10 October 2021.
55 “Taiwan Affairs Office: The So-Called ‘Neither Side is Subordinate to the Other’ is a Blatant Selling of ‘Two-States Theory’”, Taiwan Affairs Office of the State Council, 13 October 2021 [Chinese].
56 “Full text of President Tsai’s inaugural address”, Commonwealth Magazine, 20 May 2016.
57 The reference to the ROC constitution was likely a response to a February 2016 speech by Chinese Foreign Minister Wang Yi at the Center of Strategic and International Studies in Washington, in which he expressed the hope that Tsai would “accept the provision in Taiwan’s own constitution that the mainland and Taiwan belong to one, the same China”.
58 Crisis Group interviews, Lin Chong-pin, former deputy chairman of Taiwan’s Mainland Affairs Council and deputy defence minister; other former and current Taiwanese officials, July-August 2023.
59 Taipei shared copies of Tsai’s speech with Washington, Tokyo and Beijing ahead of time. Crisis Group interview, former senior Taiwanese official, August 2023. See also Chen Yue, “Tsai’s speech on cross-Strait ties offers ‘an incomplete test answer’: mainland official”, Xinhua, 20 May 2016; and Lin Zhongbin, “Xi Jinping’s adaptations”, United Daily News, 9 August 2023 [Chinese].
There are other sources of friction, besides. For instance, China sees Tsai as encouraging Taiwan’s de-Sinicisation or “cultural independence”. But, perhaps more than any specific position, Tsai’s approach is more threatening to Beijing than her predecessors’ because she has changed the terms of a longstanding cross-strait dynamic, by which Taiwan’s room to develop depended largely on China’s approval. During the Ma years, for instance, Beijing granted Taiwan some space after Taipei affirmed the 1992 consensus. Tsai has instead raised Taiwan’s international standing by securing support from Washington, without asking permission from China.

Absent a clear Taiwanese affirmation of the “one China” framing, Beijing has been uninterested in normalising cross-strait relations, as it fears doing so would legitimise the Tsai administration’s characterisation of the relationship. Since 2016, Beijing has suspended cross-strait communications and turned to a variety of coercive measures to bring Taipei back in line. Between 2016 and March 2023, it peeled away nine diplomatic allies from Taipei, persuading them to switch recognition to Beijing, thereby ending a tacit diplomatic truce under the Ma presidency. Beijing also began to use its weight in international organisations – including the World Health Organization and the International Civil Aviation Organization – to prevent Taipei’s participation as an observer, a departure from the Ma years.

More broadly, Beijing has paired economic sticks with carrots – to make clear to a Taiwanese audience that entities deemed “pro-independence” would be punished, while those that approach China with a friendlier posture would be rewarded. For instance, in 2016, Chinese tour operators began reducing the total number of tourists visiting Taiwan, while Beijing promised eight local Taiwanese officials mainly representing KMT-controlled areas that more tourists would go to their counties. Two years later, Beijing announced a slew of policies meant to give Taiwanese businesses and individuals operating in China similar benefits to those enjoyed by their mainland counterparts and, in 2023, it rolled out a further series of 21 specific

60 Chinese writings allege, for instance, that her government is downplaying China’s influence in Taiwan’s history and widening the ideological gap between the island and China by emphasising Taiwan’s democratic values. Wang Jie, “Resolutely oppose and contain Taiwan’s ‘cultural independence’”, Chinese People’s Political Consultative Conference Daily, 19 November 2022 [Chinese]; Zhou Wei and Wang Fan, “Same Chinese history, different textbooks across the strait”, BBC Chinese, 17 August 2018 [Chinese]; and Fang Jincheng, “The Evolution and Impact of Taiwan’s ‘Localisation’”, Taiwanes Studies, vol. 6 (2020) [Chinese].


63 Between 2009 and 2016, Taiwan was allowed to participate as an observer in the World Health Organization; in 2013, it participated in the International Civil Aviation Organization. “Taiwan fails in bid to join WHO assembly after China pressure”, Reuters, 23 May 2022; “Taiwan rejects China’s main condition for WHO participation”, Reuters, 15 May 2020.

64 “Tourism takes the brunt of cross-Strait relations”, Economist Intelligence Unit, 19 July 2016; J.R. Wu, “China tries to ‘divide and rule’ Taiwan by befriending pro-Beijing towns”, Reuters, 30 October 2016.
measures to make the Fujian province a first-choice destination for Taiwanese.65 Meanwhile, China began sanctioning individuals and companies deemed to be pro-independence, including a number of Tsai administration officials; in 2021, it fined companies associated with the Taiwanese conglomerate Far Eastern Group, likely for their donations to the DPP.66

In a similar vein, Beijing has banned imports of Taiwanese agricultural and fishery products that are reliant on the Chinese market, including pineapples (February 2021), wax apples and custard apples (September 2021), and grouper fish (June 2022), which mainly affects farmers and fishermen in Taiwan’s south who traditionally support the DPP.67 More recently, in April, it suggested that it could end preferential tariffs provided since 2010 in what is likely an attempt to warn voters from supporting the DPP in the 2024 election.68 The economic impact of these measures is contained, as they mainly affect agricultural and fishery products that represent only a small fraction of Taiwan’s total exports to China. They are not strategic in nature.69 But the political message they convey is unmistakable nonetheless.

As for its military profile in and around Taiwan, Beijing has leaned into shows of force, particularly, as discussed in Section III, following U.S. or Taiwanese actions that it sees as disturbing the status quo. These include high-profile trips by U.S. politicians to Taiwan and vice versa. Not only has China followed these visits with a surge in military exercises around Taiwan, but it has used them to create a new normal in terms of its military presence in the strait – significantly increasing the number of warplanes and ships it deploys, at closer proximity, to Taiwan.

Across the political divide in Taiwan, the narrative that Beijing seeks to dictate the terms of the cross-strait relationship, with little regard for the will of the Taiwanese people, has set in.70 For many, Xi’s 1 January 2019 speech, in which he asserted that the 1992 consensus meant that “both sides of the Taiwan Strait belong to one China and will work together toward national reunification”, was a case in point. Many

65 “The Taiwan Affairs Office Introduces the Latest Implementation Status of ‘31 Measures to Benefit Taiwan Compatriots’”, Taiwan Affairs Office of the State Council, 16 May 2018 [Chinese]; “Interpretation of ‘26 Measures’”, Taiwan Affairs Office of the State Council, 4 November 2019 [Chinese]; “China to set up cross-Strait integrated development demonstration zone”, Xinhua, 12 September 2023.
66 Ten people are on China’s sanctions list so far, including Taiwan’s premier Su Tseng-Chang, President of the Legislative Yuan You Si-Kun, Foreign Minister Joseph Wu and Taiwan’s representative to the U.S., Bi-Khim Hsiao. See “Authorised Spokesperson of the Taiwan Affairs Office Announces the Imposition of Sanctions on Listed ‘Taiwan Independence’ Diehards and Other Personnel”, Taiwan Affairs Office of the State Council, 16 August 2022 [Chinese]; “Firms under Taiwan-based Far Eastern Group, major DPP donor, fined for violations in mainland”, Global Times, 22 November 2021.
67 Russell Hsiao, “China Ramps up Economic Coercion on Taiwan Ahead of 2024 Elections”, Global Taiwan Brief, vol. 8, no. 8, 19 April 2023.
68 “Taiwan accuses China of election interference with trade probe”, Focus Taiwan, 20 August 2023.
69 Crisis Group interviews, Taiwanese officials, February 2023. See also Su-Lin Tan, “Beijing’s new trade restrictions on Taiwan after Pelosi’s visit are a drop in the ocean”, CNBC, 10 August 2022.
believe the speech was an attempt – albeit a miscalculated one – to capitalise on the
DPP’s significant losses in local elections at the end of 2018.71

It was also something of a turning point. While Xi’s characterisation of the 1992
consensus is consistent with China’s long-held position, Xi’s choice to underline it,
in a speech that emphasised the inevitability of “reunification” and proposed to de-
velop a Taiwan-specific “one country, two systems” solution, raised questions about
whether Beijing was removing the ambiguity inherent in the 1992 consensus.72 Xi’s
speech gave the DPP a way to link said consensus to “one country, two systems” –
a concept widely derided by the Taiwanese population. As a result, it has become
enough of a poison pill that even KMT candidates avoid referring to it for fear of the
political costs.73

The Tsai administration, which sees itself as projecting continued good-will and
Beijing as meeting it with continued rejection, dismisses the idea that new or re-
freshed assurances will result in improved relations.74 The administration’s view is
rather that Beijing engages in dialogue and cooperates with Taipei when that is in its
interest, a determination it makes, like all its policy changes, only at the behest of Xi
himself.75 Officials believe that tacit understandings with Beijing no longer hold and
ambiguities no longer work.76 The implication for Taipei is that its decision-making
should not be guided or constrained by Beijing’s “red line diplomacy”, as China will
only keep demanding more from Taiwan. Rather, it should stay its own course.77

The KMT, on the other hand, remains optimistic that tacit understandings, ambi-
tguities and dialogue can help reduce cross-strait tensions. The party insists that Bei-
jing remains open to a dynamic in which it and Taipei hold different interpretations

71 Crisis Group interviews, Taiwanese officials and scholars, December 2022-July 2023. The speech
was given on the 40th anniversary of China’s “Message to Compatriots in Taiwan”.
72 “Regular Press Conference Transcript: MAC Minister Chen’s Comments on Restoring the Histor-
ical Truth of the 1992 Hong Kong Talks”, Mainland Affairs Council, 1 January 2019. Hours after
Xi’s speech, Tsai said Taiwan has never accepted the 1992 consensus. She also characterised Bei-
jing’s definition of the consensus as the “one China” principle along with “one country, two systems”,
implying that no room exists for another interpretation. The KMT also expressed its concern, saying
“one country, two systems” is not an implied part of the 1992 consensus. Even former President Ma,
who embraces the consensus, said Xi’s interpretation diverges from the KMT’s. “President Tsai is-
sues statement on China’s President Xi’s ‘Message to Compatriots in Taiwan’”, press release, Office
of the President Republic of China (Taiwan), 2 January 2019; “Xi Jinping proposes ‘Two Systems
Taiwan Plan’, Kuomintang; it is not included in the 1992 consensus”, Liberty Times, 4 January 2019
[Chinese]; “Ma Ying-jeou: Xi Jinping’s views on the ’1992 Consensus’ are different from those of the
Kuomintang”. Liberty Times, 3 January 2019 [Chinese].
73 The KMT subsequently tried to reframe the 1992 consensus to make it more politically palatable,
but because of differences within the party, it made only the minor adjustment of framing the con-
sensus as based on the ROC constitution. Crisis Group interview, KMT official, December 2022. See
also Jesssica Drun, “The KMT Continues to Grapple with its ‘1992 Consensus’”, Global Taiwan
74 Crisis Group interviews, Mainland Affairs Council official, July and October 2023.
75 Ibid.
76 Ibid. Tsai herself said: “We’re facing a very different situation now and the type of ambiguity that
the previous governments wanted to use to preserve some sort of space for both sides is no longer
there”. “President Tsai interviewed by BBC”, Office of the President Republic of China (Taiwan), 18
January 2020.
77 Crisis Group interviews, Taiwanese officials, February 2023.
2. Washington and Beijing

The loss of confidence between Washington and Beijing over Taiwan is fundamentally linked to a shift in the military balance of power in Asia that increasingly tilts in China’s favour. This evolution has engendered strategic rivalry. Rising Chinese capabilities have sown anxiety in Washington: how long will the U.S. remain the leading power in Asia? Will it be able to fulfil security commitments to regional allies and partners, including Taiwan? China’s growing assertiveness regarding the long-standing unresolved sovereignty issues in its neighbourhood, including its claims in the South China Sea and along its border with India, as well as its increasing use of economic coercion globally, have fuelled U.S. concerns about how Beijing intends to leverage its military and economic strength.

From Beijing’s perspective, military modernisation and economic growth are elements of its rightful development. It views itself as correcting for a period of “humiliation” in Chinese history from the First Opium War in 1839 to World War II. China sees itself as being on a trajectory to resume its proper place at the top of the global hierarchy – a concept referred to as “national rejuvenation”. The leadership considers exercises of power natural for a country of China’s stature as well as necessary for deterring what it sees as defiant acts by neighbours that could erode Chinese claims and interests.

But from Washington’s point of view, acts of coercion in the name of Chinese national interest and security indicate both China’s intention and its capacity to alter the post-World War II international rules-based order, which the U.S. itself sometimes honours in the breach, but which has been a bulwark of U.S. power nonetheless. In turn, Beijing perceives Washington’s efforts with other countries to push back against China as a cynical attempt to contain its rise in order to maintain U.S. primacy.

Under the spotlight of competition, Taiwan has become the central stage on which both Washington and Beijing project their strategic anxieties. For Washington, China’s growing military power has put into question whether the U.S. could prevail in case of a Chinese military invasion of Taiwan, should it choose to intervene. Many in the U.S. increasingly see the defence of Taiwan as a test of Washington’s ability to uphold its security commitments in the face of Chinese assertiveness. Following Russia’s invasion of Ukraine, some also increasingly link it to global efforts by democracies invested in the current order to hold the line against revisionist, authoritarian states.

For Beijing, unification with Taiwan has always been part of a promise made by the CPC to the Chinese people to defend China’s sovereignty and territorial integrity. It is therefore a measure of the party’s legitimacy. But Taiwan’s strategic importance

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78 Crisis Group interviews, KMT official, December 2022 and June 2023.
79 China refers to the intervening years as the “century of humiliation”. For more on this narrative, see, for example, Alison A. Kaufman, “The ‘Century of Humiliation’ and China’s National Narratives”, testimony before the U.S.-China Economic and Security Review Commission, 10 March 2011.
has also grown in Beijing’s eyes as leaders come to see the return of the island as a test of China’s ability to break through Western containment. It is therefore inextricably linked to their concept of China’s rise. Taiwan sits along a chain of islands stretching from the Japanese to the Indonesian archipelagos enclosing the waters surrounding China. Beijing has long viewed U.S. influence along this chain as constricting its ability to project power beyond its near seas. At the same time, many in Chinese foreign policy circles believe that Washington is goading Beijing into a conflict over Taiwan to set back China’s development.80

These mutually heightened anxieties have led decision-makers in Washington and Beijing to the conclusion that clearer, more vigorous shows of strength are necessary to deter the other side. Beijing’s military capabilities and more demonstrative approach to cross-strait relations, discussed above, are indications to Washington that it could turn to military means to achieve its goals. In an attempt to deter such a course of action, Washington has provided more substantive and explicit political and military support to Taiwan, a shift that the Trump administration initiated and the Biden administration has carried forward.

Against this backdrop, bilateral exchanges and contact between the U.S. and Taiwan have taken place at higher levels in precedent-breaking ways, making the unofficial relationship appear increasingly official. A call between Tsai and Donald Trump in December 2016 marked the first time a U.S. president-elect or president had spoken with Taiwan’s leader since U.S.-China normalisation.81 In August 2020, U.S. Secretary of Health and Human Services Alex Azar visited Taipei, the highest-level post-normalisation trip by a U.S. cabinet official.82

U.S. government guidance on limiting executive branch contacts with Taiwanese officials was largely removed under the Trump administration, with some but not all restrictions reinstated under Biden.83 But, during the Biden era, congressional engagement has become much higher-profile. In August 2022, then-Speaker of the House Nancy Pelosi became the most senior U.S. official to visit Taiwan since 1997, when then-Speaker Newt Gingrich went.84 In addition to being the leader of the lower house of the U.S. Congress, the speaker is second in line to the presidency, behind only the vice president. Pelosi is also a member of President Biden’s own Democratic Party, suggesting to some that he must have had some influence over her decision to go. In May 2023, Tsai met Pelosi’s successor from the opposition Republican party, Speaker Kevin McCarthy, in California; it was the highest-level reception that a Taiwanese leader has ever received on U.S. soil.85

Cooperation is expanding in a number of areas. In March 2021, the two sides signed a coast guard memorandum of understanding.86 They then inked the first

80 Crisis Group interviews, Chinese scholars, March and June 2023.
82 “US health chief Alex Azar to make ‘historic’ visit to Taiwan”, Al Jazeera, 5 August 2020.
83 For instance, U.S. and Taiwanese officials are permitted to meet in U.S. federal buildings, which had not been the case prior to Trump. Matthew Leep, “U.S. unveils new rules for government contacts with Taiwan”, AP, 10 April 2021.
84 Hsiao, “Avoiding the Next Taiwan Strait Crisis”, op. cit.
85 Hsiao, “Assessing the Implications of the Taiwanese President’s Trip to the U.S.”, op. cit.
86 “AIT and TECRO sign MOU to establish a coast guard working group”, press release, American Institute in Taiwan, 26 March 2021.
agreement under the U.S.-Taiwan Initiative on 21st Century Trade in June 2023.87 Military exchange and defence cooperation has also significantly deepened. The number of U.S. military advisers on rotational deployment to Taiwan to provide training to its armed forces increased from around 30 in 2022 to 200 in 2023.88 Training has expanded to include the U.S. National Guard, and the U.S. navy sails through the Taiwan Strait almost monthly.86

As concerns arms sales, the Trump administration broke with previous practice and sold Taiwan long-range missiles that can strike China’s east coast.90 For its part, the Biden administration has played an increasingly proactive role in shaping Taiwan’s weapons purchases, encouraging Taipei to buy the types of equipment that it believes conform with an “asymmetric” defence strategy (discussed further in Section IV) that could repulse a Chinese invasion.91 In 2023, Congress authorised $2 billion in loans to Taiwan through the foreign military financing program for five years.92

On the diplomatic front, Washington has worked to internationalise its Taiwan strategy by encouraging other countries to increase their unofficial cooperation with Taipei.93 By being more outspoken itself, it has also created political space for other countries to express their desire for non-conflict over Taiwan. Governments and international groupings are increasingly willing to talk about Taiwan in official statements. In May 2021, the G7 summit communiqué for the first time mentioned the

87 The agreement covers customs administration and trade facilitation, good regulatory practices, services domestic regulation, an anti-corruption initiative, and small- and medium-sized enterprises. “USTR announcement regarding U.S.-Taiwan trade initiative”, U.S. Trade Representative, 18 May 2023.
88 Nancy A. Youssef and Gordon Lubold, “US. to expand troop presence in Taiwan for training against China threat”, The Wall Street Journal, 23 February 2023; and “Military sources say around 200 U.S. advisers currently in Taiwan”, Focus Taiwan, 17 April 2023. The number of troops Taiwan is sending to the U.S. for training is also reportedly increasing to a battalion; a platoon or company was sent in the past. “Taiwan’s plan to send battalion to U.S. shows progress in exchanges”, Focus Taiwan, 22 February 2023.
90 The Trump administration approved several packages of offensive weapons to be sold to Taiwan, including 135 Standoff Land Attack Missile Expanded Response (SLAM-ER) Missiles and eleven High Mobility Artillery Rocket System (HIMARS) in October 2020, breaking with the previous practice of selling Taiwan weapons strictly of a defensive nature. See Bonnie Girard, “With New Offensive Weapons Package, Trump Administration Goes All-in for Taiwan”, The Diplomat, 30 October 2020. It should be noted that Taiwan already possesses some capability of its own to strike the Chinese coast in its Hsiung Feng IIE missile. See “Missiles of Taiwan”, Center for Strategic and International Studies, August 2021.
91 Lara Seligman, Alexander Ward and Nahal Toosi, “In letters, U.S. tries to reshape Taiwan’s weapons requests”, Politico, 10 May 2022.
92 Congress also approved up to $1 billion worth of assistance under the Presidential Drawdown Authority, and $500 million for an annual regional contingency stockpile. In July, a $345 million drawdown was announced, marking the first time this mechanism was used to supply Taiwan with weapons. “Taiwan in the National Defence Authorization Act (NDAA), 2023”, U.S.-Taiwan Business Council, 23 December 2022; and “Memorandum on the Delegation of Authority Under Section 506(a)(3) of the Foreign Assistance Act of 1961”, White House, 28 July 2023.
93 Including via the Global Cooperation Training Framework, a platform created in 2015 meant to allow Taiwan to share its expertise in a variety of fields.
importance of peace and stability across the Taiwan Strait, and in a departure from
the past, Japan and South Korea both mentioned Taiwan in their bilateral statements
with the U.S., respectively in April and May 2021.94 Foreign delegations are also visit-
ing Taipei in record numbers.

In seeking to reassure Taipei of its support, the U.S. has also begun to character-
ise its relationship with Taiwan in ways that elevate its strategic importance, at times,
raising questions about whether U.S. policy has changed. In December 2021, Assis-
tant Secretary of Defense for Indo-Pacific Security Affairs Ely Ratner attached stra-
tegic significance to keeping Taiwan secure, calling it a “critical node within the first
island chain ... that is critical to the region’s security and critical to the defence of
vital U.S. interests in the Indo-Pacific”.95 Biden himself has said four times that his
administration would defend Taiwan should China attempt to invade, even if in each
case officials later clarified that the U.S. policy of strategic ambiguity remains
unchanged.96 In September 2022, Biden asserted that Taiwan should make its own
judgement about independence, again breaking with traditional post-normalisation
U.S. policy, which stresses that an outcome should be mutually agreed upon.97

Domestically, expressions of support for Taiwan through draft legislation have
become a way for members of the U.S. Congress to score political points by signal-
ing toughness on China.98 The content of some bills has also raised questions about
whether U.S. policy has changed.99 For instance, a draft of the Taiwan Policy Act of
2022 included a provision removing existing restrictions on interactions between U.S.
and Taiwanese officials that, in the first, place were created precisely to ensure the
relationship remains unofficial.100

These actions have only fed the escalatory dynamic between the U.S. and China.
From Beijing’s perspective, Washington’s increasing shows of support for Taiwan
indicate a hollowing-out of the U.S. “one China” policy and suggest that the U.S.
seeks to keep Taiwan permanently separated from the mainland. Its response has
been to increase political and economic pressures on Taipei, as discussed above, and
to escalate military exercises around Taiwan. Through military signalling, Beijing
seeks not only to express its opposition to specific actions taken by Taiwan and the
U.S., but also to heighten a sense of risk in order to induce caution on the part of
decision-makers in Taipei and Washington, to deter deeper forms of cooperation and
additional actions that – from Beijing’s point of view – will make unification with Tai-

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94 Ken Moriyasu, “Biden and Suga refer to ‘peace and stability of Taiwan Strait’ in statement”, Nik-
kel Asia, 17 April 2021; and Hwang Joon-bum, “S. Korea-US joint statement mentions ‘Taiwan’,
leaves China out”, Hankyoreh, 24 May 2021.
95 “Statement by Dr. Ely Ratner Assistant Secretary of Defense for Indo-Pacific Security Affairs”,
U.S. Senate Committee on Foreign Relations, 8 December 2021.
96 In August 2021, October 2021, May 2022 and September 2022.
97 “Biden tells 60 Minutes U.S. troops would defend Taiwan, but White House says this is not offi-
98 According to a search using Govtrack.us, the number of bills introduced on Taiwan has increased;
the 116th Congress (2019-2021) introduced 45 bills while the 117th Congress (2021-2023) intro-
duced 54.
wan more challenging. Shows of military strength are also meant to deter Taiwanese from formally declaring independence.101

Recent Chinese military drills around Taiwan have been unprecedented in intensity, frequency and scale. A key turning point was Pelosi’s visit to Taipei in August 2022. In response, Beijing conducted massive exercises over six days, firing eleven long-range ballistic missiles over Taiwan, breaching the median line with People’s Liberation Army (PLA) ships and planes, and rehearsing a blockade of the island. (The median line, which cuts across the Taiwan Strait, had served for decades as an understood boundary behind which China and Taiwan each restricted their military activities.102) Beijing also deployed drones into the airspace of Taiwan’s offshore islands and conducted cyberattacks on government websites.103 A second milestone of a sort came in April 2023 when, in response to Tsai’s meeting with Speaker McCarthy in the U.S., China conducted significant exercises that involved activities close to Taiwan’s contiguous zone (ie, 24 nautical miles off its shore), a Chinese law enforcement presence in the Taiwan Strait and drills off of the island’s east coast.104

Outside of major exercises, the PLA’s presence around Taiwan is constant and steadily increasing. Sorties by PLA planes into Taiwan’s de facto Air Defence Identification Zone (ADIZ) take place on a near-daily basis and have risen in frequency since 2020, when Taiwan’s defence ministry began to publish data.105 After Pelosi’s visit in 2022, median line crossings have also become a regular feature. As of September 2023, 1,372 PLA planes had been detected either crossing the median line, or in the south-western and eastern parts of the ADIZ in 2023. In comparison, Beijing conducted 972 sorties in 2021 and 1,737 in 2022.106

PLA activities in Taiwan’s ADIZ and across the median line serve multiple objectives. First, as mentioned previously, these sorties are, at times, linked to particular U.S. decisions and therefore aimed at signalling Chinese concerns and raising the cost of future U.S. actions.107 Secondly, these activities create dilemmas for the Taiwanese

101 China describes reserving the use of force option as guarding against interference by outside forces and Taiwanese separatists. See for instance China’s 2022 White Paper on Taiwan.

102 In September 2020, Beijing rejected its existence. See “The Taiwan Affairs Office: There is No So-called ‘Median Line’ between the Two Sides of the Taiwan Strait”, Taiwan Affairs Office of the State Council, 30 September 2020 [Chinese].

103 Johnson Lai and Huizhong Wu, “China conducts ‘precision missile strikes’ in Taiwan Strait”, AP, 5 August 2022; “Cyber attacks reported in stores, gov’t facilities during Pelosi visit”, Focus Taiwan, 3 August 2022.

104 Hsiao, “Assessing the Implications of the Taiwanese President’s Trip to the U.S.”, op. cit.

105 ADIZs are government-designated airspaces within which all aircraft are expected to comply with identification and reporting procedures; they do not represent territorial airspace. Taiwan’s ADIZ technically covers parts of the mainland, but the government only counts sorties that enter the south-eastern portion of the ADIZ, using the median line as the starting boundary. The data is published daily on the ministry’s website or the Twitter account @MoNDefense. Hsiao, “China’s Military Activities Near Taiwan Aim to Impress at Home and Abroad”, op. cit.


107 Apart from the aftermath of Nancy Pelosi’s visit, on 25 December 2022, China sent 71 warplanes, the most ever recorded in a day, into Taiwan’s ADIZ, shortly after the U.S. Congress passed that year’s National Defence Authorization Act. The next 9 January, 57 Chinese aircraft crossed into Taiwan’s ADIZ, shortly after the destroyer USS Choong-Hoon transited the strait and the U.S. an-
government and military. Constant pressures force the Taiwanese military to remain vigilant and to dispatch its own fighter jets to challenge especially intrusive exercises, in part to demonstrate to the Taiwanese public the military’s capacity to defend the island. But sending up planes is costly, both in the short term and in the long run, as it takes up time and money that could otherwise be devoted to bolstering defences that would be needed in the event of a Chinese invasion.\textsuperscript{108} Thirdly, such drills provide the PLA with training, for instance letting its personnel get familiar with the Bashi Channel, a chokepoint that connects the Taiwan Strait to the Pacific Ocean, and control of which is hence important for denying external forces entry to the first island chain in the event of a conflict.\textsuperscript{109}

Washington sees Beijing’s mounting military activity as confirmation of the latter’s malign intent toward Taiwan, which strengthens voices calling for the U.S. to increase its symbolic and substantive shows of support for Taiwan. Such demonstrations, in turn, help create an echo chamber in Beijing, where officials increasingly believe that unification by force may be necessary.\textsuperscript{110}

\textsuperscript{108} In 2021, Taiwan’s air force requested 29.2 billion New Taiwan dollars (1 billion in U.S. dollars) for “maintenance and operational facility procurements” in the annual budget, representing a 56 per cent increase in expenditures since 2016 when the Tsai administration took over. Lawrence Chung, “Taiwan reveals high cost of PLA aggressive sorties with air force budget boost proposal”, \textit{South China Morning Post}, 7 September 2021.

\textsuperscript{109} Additionally, the channel’s deep waters make it ideal for submarines.

\textsuperscript{110} Zhao Tong, “How China’s Echo Chamber Threatens Taiwan”, \textit{Foreign Affairs}, 9 May 2023.
III. What Could End the Status Quo: Scenarios and Risks

As noted above, the status quo has traditionally comprised different elements for each of the principal actors in the Taiwan Strait. For China, it is critical that Taiwan not pursue de jure independence, which would obstruct unification, its ultimate goal. For Taiwan, the key is to maintain de facto sovereignty, thus keeping a say in determining its own status. As for the U.S., it seeks an equilibrium in which China does not pursue forceful unification and Taiwan does not declare formal independence. Within this matrix, all the parties constantly try to improve their respective positions without going so far that the others walk away from the framework altogether, potentially leading to conflict. Yet this game is dangerous: the more any party feels it is losing the ground it most cares about, the more the conflict risk rises.

For purposes of assessing whether this risk is still growing, a key consideration will be how a militarily more capable China responds to a shifting environment in which the barriers to peaceful unification have got higher thanks to a stronger sense of Taiwanese identity and Washington’s efforts to strengthen Taiwan’s de facto sovereignty.

On one hand, despite the challenges, peaceful unification remains Beijing’s stated preference. China appears to remain confident that, with time and a cross-strait power balance that continues to shift overwhelmingly in its favour, Taiwanese “compatriots” will come around to seeing unification as an “inevitable historical trend”. In 2021, Xi remarked that “time and momentum are always on our side”. Similarly, Xi’s report to the 20th Party Congress and 2019 speech on the 40th anniversary of the “Letter to Taiwan Compatriots”, and the 2022 White Paper on Taiwan all convey the belief that reunification is inexorably approaching.

On the other hand, China’s war-fighting capacity has increased. Moreover, Beijing has long believed that the threat of force – replete with clearly escalatory shows of military might – is important for deterring Taiwan from moving toward formal independence and inducing caution in how Washington engages with Taipei. This mindset may increase the risk of conflict due to misjudgement or miscalculation.

It is also not certain how long China’s current preferences will hold. Its decision-making about whether and how to apply force to compel unification will be both fundamentally political and also contextual – in that it will take into account various factors above and beyond the advancement of its military capabilities, including the domestic and international situation that the country faces. Beijing will not necessarily attack Taiwan simply because it has the military ability to do so. Nor, however, is

111 “Subduing the enemy without fighting? U.S. expert: China still pursues ‘strategic patience’ in dealing with the Taiwan issue”, Taiwan Network, 24 June 2022 [Chinese].
112 Kinling Lo and Kristin Huang, “Xi Jinping says ‘time and momentum on China’s side’ as he sets out Communist Party vision”, South China Morning Post, 12 January 2021.
113 For instance, Xi’s report to the 20th Party Congress says: “the wheels of history are rolling on toward China’s reunification and the rejuvenation of the Chinese nation.” Amanda Hsiao and Ivy Kwek, “The Foreign Policy Implications of China’s Twentieth Party Congress”, Crisis Group Commentary, 21 October 2022.
114 Lu Mei and Zhu He, “Sun Yafu: If you want peace, you cannot ask for ‘Taiwan independence’”, Hua Yu, 17 August 2022 [Chinese].
it likely to hold back from launching an assault, regardless of its capacities at the time, if it feels Taiwan has crossed its red line, namely declaring de jure independence.\textsuperscript{115}

While Beijing’s most likely course will be to proceed deliberately so long as Taiwan does not cross this line (which is unlikely for the reasons noted above), it will also continue weighing the costs and benefits of different strategies for preventing de jure independence and achieving unification. The primary coercive strategies it can be expected to consider, and the attendant risks, are as follows.

A. Full Amphibious Invasion Scenario

China clearly wants to have the option to launch an all-out military invasion of Taiwan as a means of achieving unification. At present, the political, economic and military costs of such an undertaking would almost definitely be high, and the chances of success – defined as swiftly and decisively securing Taiwan – would be uncertain.\textsuperscript{116}

For China, the objective would be to score a quick victory, a fait accompli, before the U.S. can fully respond.\textsuperscript{117}

An all-out invasion would involve a complex amphibious operation in which large numbers of Chinese troops and amounts of equipment would be transported across the Taiwan Strait, which spans 70 nautical miles at its narrowest. This operation would be preceded by, or take place concurrently with, attacks on Taiwan’s air and missile defences, as well as its navy, and would likely involve missile strikes on key infrastructure and government offices and a blockade that cuts the island off from key imports and external assistance.\textsuperscript{118}

At present, it appears that the PLA is not yet prepared to carry out a successful amphibious invasion. Several scholars point to limitations in the PLA’s ability to transport sufficient soldiers and equipment by sea and air across the strait in timely fashion.\textsuperscript{119} Of course, the situation is not static; the PLA is actively working to fill these gaps and the cost China might pay depends on the degree to which the U.S. and Taiwan develop their own capabilities. Both are doing so. According to U.S. officials, the Chinese leadership has instructed the military to be ready for an attack by 2027, although they emphasise that Beijing has not necessarily decided to invade in that year or any other.\textsuperscript{120}

The biggest risk – and active deterrent – to any Chinese effort to unify with Taiwan by force is the possibility of entering a direct conflict with the U.S. While Wash-
ington officially maintains a policy of strategic ambiguity, there are many reasons to expect that it would be drawn into the fight. The U.S. would likely believe its credibility as an Asian power and security guarantor for treaty allies in the region to be at stake. Appearing to take a back seat to Beijing amid exacerbated U.S.-China rivalry could create massive domestic political blowback. President Biden’s multiple statements suggesting that the U.S. would send troops to defend Taiwan in case of an invasion (even if subsequently qualified by his staff) are also hard to dismiss.121

The outcome of a military clash is anyone’s guess. Wargames, with all their limitations, point in both directions. Some recent ones suggested that the U.S. and Taiwan could jointly repel a Chinese invasion, but they assumed Japan’s participation (not a given) and indicated heavy losses for both the U.S. and China.122 Others predicted Chinese victory.123 The uncertainty means that an invasion remains high-risk for Beijing, given that the military costs appear certain.

Just as significant from the perspective of deterrence are the economic and human costs that China would likely have to bear should it invade. According to one estimate, a year-long war, factoring in U.S. sanctions, would reduce China’s GDP by 25 to 30 per cent, with the three coastal provinces nearest to Taiwan – Guangdong, Fujian and Zhejiang (which together contribute around 22 per cent of China’s GDP) bearing the worst impact.124 China would also likely face a food security crisis due to its continued dependency on soybeans imported from the U.S.125 Such economic shocks could derail Beijing’s plans to achieve “national rejuvenation” and to become an economic and military power on par with the U.S. by 2049. They could also, paired with the domestic fallout of Chinese casualties, create political instability that challenges the CCP’s hold on power.

More broadly, the near-term geopolitical climate is not especially propitious for a Chinese invasion, not least because growing threat perceptions of China among Western countries and in parts of Asia will make it easier for the U.S. (as Taiwan’s main security partner) to bring together a supportive coalition.

121 Given the anticipated scope and duration of a conflict with China, it is likely that the president would seek congressional authorisation prior to using military force. David Brunnstrom and Trevor Hunnicutt, “Biden says U.S. forces would defend Taiwan in the event of a Chinese invasion”, Reuters, 18 September 2022.
122 Recent simulations suggest the U.S. and Japan would lose “dozens of ships, hundreds of aircraft and thousands of lives”, with the U.S. sustaining damage to its global military position. Two of three iterations of the base scenarios saw Chinese forces being unable to capture major cities and running out of supplies within ten days, losing an average of 138 ships, including 90 per cent of amphibious forces, and 161 fixed-wing aircraft. Mark F. Cancian, Matthew Cancian and Eric Heginbotham, “The First Battle of the Next War: Wargaming a Chinese Invasion of Taiwan”, Center for Strategic and International Studies, January 2023.
123 Tara Copp, “‘It failed miserably’: After wargaming loss, Joint Chiefs are overhauling how the U.S. military will fight”, Defense One, 26 July 2021.
125 “$2.6 tn could evaporate from global economy in Taiwan emergency”, Nikkei Asia, op. cit.
B. Blockade Scenario

A standalone blockade scenario absent a full invasion is unlikely to be effective as a means of achieving unification. The idea would be to starve and intimidate Taiwan into submission by blocking its sea lanes of communications and trade, including by disrupting its energy imports (over 97 per cent of the island’s energy is imported).\textsuperscript{126} This approach bears similarity to a strategy called the “Beiping model” that has been discussed with more frequency in Chinese academic circles following Pelosi’s visit.\textsuperscript{127} This strategy follows Sun Tzu’s counsel about “subduing the enemy without fighting” by “surrounding but not destroying”.

But achievement of Beijing’s objective – defined as forcing Taiwan to the table to begin unification talks – is not assured. First, it is unclear how the Taiwanese population and leadership would react: instead of capitulation or panic, the population could rally in defiance. Secondly, thanks to Taiwan’s stockpiles, it would take time for the blockade to inflict pain, allowing the island to look for ways to appeal to its international partners for assistance and for external actors to develop a response.\textsuperscript{128} It is unclear how long China could sustain a siege, if Taiwan and its partners were to find ways around a blockade, and a protracted campaign would be contrary to the PLA’s goal of winning a quick war. Third, the economic costs of a blockade – over $2 trillion worth of disruption by one measure – would be exorbitant for not just Taiwan, but for China and the world as well.\textsuperscript{129}

Rather than using it as a means of unification, Beijing might consider imposing a temporary blockade as a means of deterrence in response to what it perceives as provocation or escalation by the U.S. or Taiwan.\textsuperscript{130} For example, it could temporarily impose control in the air and maritime space surrounding Taiwan, restricting the movements of both military and civilian ships and aircraft. China’s coast guard could also impose a stop-and-search regime on cargo vessels and fishing boats to prevent

\textsuperscript{126} Taipei is estimated to have in its strategic reserves 39 days’ worth of coal, 146 days’ worth of oil and eleven days’ worth of natural gas. Lisa Wang, “Energy supplies sufficient, ministry says”, \textit{Taipei Times}, 4 August 2022.

\textsuperscript{127} First proposed by Chinese leader Mao Zedong as one of the options for unifying Taiwan (as opposed to the Tianjin model, which refers to a full invasion), the Beiping model refers to the CCP’s victory against the Kuomintang (KMT) in 1949 at the city of Beijing (now Beijing), where the KMT army was simultaneously surrounded by a CCP blockade and undermined by infiltration within its own ranks. After the fall of the neighbouring Tianjin to the CCP, the KMT army’s morale diminished, leading to their capitulation. See: “The People’s Liberation Army exercises demonstrate the ability to comprehensively block Taiwan, and the “Beiping Model” can be put in action!”, \textit{Taiwan Network}, 12 April 2023 [Chinese]; “What else do we need to do to liberate Taiwan with the ‘Beiping Model’?”, \textit{Hongsewenhuawang (Red Culture)}, 14 August 2022 [Chinese].

\textsuperscript{128} For instance, the U.S. could break the blockade by attempting an “evacuation” of U.S. citizens in Taiwan or by bringing in supplies. Taiwan could use drones, fishing boats and sea mines to complicate the situation. Crisis Group interview, Ou Si-fu, research fellow, Institute of Defense and Security Research, December 2022.


\textsuperscript{130} For instance, Beijing could justify such measures by saying it seeks to prevent U.S. military equipment from reaching Taiwan. As a practical matter, however, it would be difficult for China to separate military from non-military cargo, so the consequence would likely be a full blockade.
them from reaching the island. Further, Beijing could increase its military presence in the waters by conducting large-scale air and maritime operations, while the coast guard and maritime militia would swarm ships in the vicinity.\(^{131}\) Such a visible show of force, however, would likely result in a rallying effect around Taiwan and additional defensive measures by the island and its partners, making it harder for China to pursue the option of unification by force.

C.  

**Everyday Coercion Scenario**

The default scenario – and the one that Taiwan currently lives with – is that the island will face daily pressure from China in the form of military, economic and influence operations.

This scenario is less escalatory, and thus lower-risk, than invasion or blockade, but it is hardly free of hazard. The chance of an unintended military collision, in particular, has gone up significantly in recent years. As previously noted, PLA activities in Taiwan’s ADIZ and across the median line take place on a near-daily basis. In narrower parts of the Taiwan Strait, Chinese warplanes can reach Taiwan’s coast in minutes. With the PLA operating much closer to its shores, Taiwan’s response time is decreasing, heightening the risk of miscalculation, and therefore of an unintended collision. The dangers are made more acute by the lack of crisis management mechanisms shared by China and Taiwan, as well as the contentious political environment, which may incline decision-makers on either side to mistakenly read hostile intent in the other’s actions.\(^ {132}\)

Also as noted, Beijing tries to maintain divisions in Taiwan’s already polarised polity by providing economic benefits for those who call for a conciliatory approach to the mainland and penalising those who do not. Besides economic statecraft, China conducts influence operations with the aim of sowing social discord.\(^ {133}\) These operations seek to breed fatalism regarding Taiwan’s future – by reducing confidence in the U.S. commitment to Taiwan and playing up China’s military strength. They also seek to increase discontent with the ruling DPP, including over governance issues, and by alleging that the party is pushing Taiwan toward war and harming the economy in pursuing a provocative cross-strait policy.\(^ {134}\)

At the same time, Beijing aims to advance a pro-unification agenda in Taiwan by amplifying China’s official narrative, promoting pro-China news and showcasing the benefits of unification. Beijing uses a variety of tools to tell the tales that suit its interests, including through a network of pro-China grassroots leaders associated with the United Front Work Department. This department under the CCP’s central com-


\(^ {132}\) Crisis Group interview, Taiwanese official, February 2023.

\(^ {133}\) No fewer than 2,900 instances of disinformation were recorded between Pelosi’s visit and local elections in November 2022. Manipulation of key news items in the leadup to the local elections was also observed. See Sarah Zheng, “Worse than spy balloons? Taiwan is more concerned with Chinese hacking”, Bloomberg, 14 February 2023.

\(^ {134}\) See analyses by the Information Operations Research Group.
mittee is tasked with monitoring, influencing and disseminating party ideology among targeted groups.135

It is difficult to gauge the impact of Chinese coercion and disinformation on Taiwanese sentiment. These efforts are a part of a much larger information environment in which Chinese influence is just one factor. Other factors include Taiwan’s own propaganda and efforts to push back against disinformation and the actions and narratives of other external actors. Perhaps partly for this reason, despite China’s efforts, the percentage of Taiwanese who prefer unification in the near or long term has consistently stayed under 10 per cent since the 1990s.136 The persistent trend among the overwhelming majority of Taiwanese is to prefer the status quo.137

Still, Taiwanese sentiment remains divided and ambivalent in many respects when it comes to preparing for a possible war. One series of polls shows the percentage of respondents who believe the U.S. will come to Taiwan’s assistance varying from 34.5 to 65 percent between 2021 to 2023.138 Polls also yield conflicting results as to whether Taiwanese themselves are willing to fight should war break out, suggesting either that many people are undecided or that their feelings might change depending on conditions. In a December 2022 poll conducted by the Taiwan Foundation of Democracy, 71.9 per cent of respondents said they were willing to take up arms to resist China’s unification efforts, but in an October 2023 poll by Global View Monthly, 54 percent of respondents said they were not willing to fight or allow family members to fight in a war with China.139

Morale appears to ebb and flow. One survey suggested that Russia’s invasion of Ukraine – and the Western response – has boosted Taiwanese willingness to fight in a war.140 At the same time, anecdotal accounts of Taiwanese middle-class people

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135 Groups on the United Front Work Department’s radar include the Chinese diaspora and ethnic and religious minorities, as well as individuals of interest from Taiwan, Hong Kong and Macau. In Taiwan, the department often works through leaders active in community-based organisations. Some of these grassroots leaders have formed fringe political parties, including the pro-China New Party and Chinese Unity Promotion Party. Erin Hale, “China spinning a ‘web’ of influence campaigns to win over Taiwan”, Al Jazeera, 13 June 2023.

136 Factoring in both those who favoured “Unification as soon as possible” and “Maintain status quo, move toward unification”. “Taiwan Independence vs. Unification with the Mainland (1994/12-2023/06)”, op. cit.


138 Liu Shuting, “National defence poll shows decline in suspicion of the U.S., some reflections”, Institute of National Defense and Security Research, 26 April 2023 [Chinese]; “If the CCP Invades Taiwan by Force, Taiwanese Confident the U.S. Will Send Troops to Help Defend Taiwan”, Taiwan Public Opinion Foundation, 21 February 2023 [Chinese].

139 “Taiwan Foundation for Democracy poll: more than 70 per cent of people are willing to fight China’s unification by force”, Central News Agency, 30 December 2022 [Chinese]; “Global Views 2023 Cross-Strait Peace Survey: Nearly 60 per cent of the people hope that the two sides of the Taiwan Strait will maintain the status quo, reaching a record high”, *Global Views Magazine*, 10 October 2023 [Chinese]; and Austin H.E. Wang and Nadia Eldemerdash, “National Identity, Willingness to Fight, and Collective Action”, *Journal of Peace Research*, vol. 60, no. 5 (December 2022).

140 A huge spike was observed in a March 2022 survey that asked Taiwanese respondents if they are willing to defend Taiwan if China attacks. Lawrence Chung, “After Ukraine, more Taiwanese willing to fight for island, survey finds”, *South China Morning Post*, 15 March 2022.
moving their savings overseas as a backup plan underline existing trepidation.\textsuperscript{141} The anxieties could be self-fulfilling. The more Taiwanese appear irresolute or fatalistic, the greater chance they could send a signal to Beijing that Taiwanese resilience would be low in the event of an invasion or blockade.

\textsuperscript{141} Kathrin Hille, “‘People are nervous’: Taiwan’s wealthy shelters money overseas in fear of China conflict”,\textit{ Financial Times}, 4 July 2023.
IV. Safeguarding the Status Quo

At present, there is no feasible long-term political resolution of Taiwan’s status that could reconcile the sharply divergent interests of Beijing, Taipei and Washington. Where the three parties do converge, at least for now, is around an interest in avoiding armed conflict. Until conditions change sufficiently to allow for a peaceful, political solution to emerge, the best path to preserving stability in the Taiwan Strait is to shore up the status quo. Doing so will require the three parties to take a series of reciprocal, incremental steps to signal to one another willingness to stay within the framework of understandings that have helped keep a lid on tensions over past decades. At the same time, Taiwan will need to boost its resilience so that it can credibly convey the costs of overturning the status quo by trying to take over the island by force.

A. Boosting Assurance

1. De-escalating between the U.S. and China

First, stabilising the competitive U.S.-China relationship is the best way to create a more permissive environment for both sides to contain escalation around Taiwan. This task will take some work. Since rivalry between the two powers began heating up during the Trump administration, the relationship has been moving in the direction of greater and greater friction.

As mentioned previously, the U.S. sees China as threatening its primacy, while China views the U.S. as preventing its rightful rise to the top of the global hierarchy. Washington is concerned about China’s gross human rights abuses and attempts to replace the rules-based order with one more favourable to Beijing. Against this backdrop, the U.S. watches with suspicion Beijing’s deepening strategic ties to Moscow and growing influence in the developing world. For its part, China sees the U.S. as trying to hem it in through new defence partnerships (including the AUKUS deal with Australia and the UK) and reinvigorated ones, including with South Korea, Japan and the Philippines. Beijing is worried about the Biden administration’s pursuit of aggressive industrial and export control policies it sees as designed to keep the U.S. up and China down in key technologies.

Tensions were high at the beginning of the Biden administration, but in late 2022 Xi and Biden met in person for the first time, bespeaking a desire on both sides to calm the competitive relationship. Plans to advance that effort were derailed when a Chinese surveillance balloon drifted over the U.S., seemingly off course, in late February. The public outcry in the U.S. contributed to a spike in friction between the two governments, delaying plans at the time to have U.S. Secretary of State Antony Blinken visit China.

Since then, the two sides have worked quietly to patch things up, and, at least for the moment, the bilateral relationship appears to be moving in a better direction, with more visits and the establishment of a regular economic dialogue. The sides have pencilled in a Xi-Biden summit on the sidelines of the Asia-Pacific Economic Cooperation meeting in November; should it take place, they would amplify the signal that they are both interested in finding ways to lower the temperature.

There is still more that could be done. As Crisis Group has previously recommended, a worthy step would be to return to more regular security and defence dis-
Discussions with an eye to decreasing the odds of an unintended conflict.142 (The key obstacle has been China’s reservations about initiatives that would make it more comfortable for the U.S. military to operate on its perimeter.) The two sides have also expressed interest in developing guiding principles for the overall relationship, a process that may help sketch out the outer bounds of competition.143

As for specific steps relating to Taiwan, a future leaders’ meeting also provides an opportunity for the two leaders to convey assurances privately and publicly. The two sides could, in the leaders’ remarks following the meeting, highlight Washington’s non-support for Taiwan’s de jure independence and Beijing’s preference for peaceful unification. While senior U.S. officials have publicly repeated that the U.S. does not back independence for Taiwan, a public statement by Biden would carry more weight.144 For Xi, a possible move would be to reiterate previous language to the effect that China “will strive for the prospect of peaceful reunification with utmost sincerity and efforts”.145 In framing their remarks, both sides could make clear that their words should be understood in the context of long-held positions and policies concerning cross-strait dynamics.

The next step would be for each side to put concrete actions behind these words. China could scale back its military activity around Taiwan. As a first step, it might reduce the number of ships and planes passing close to Taiwan’s contiguous zone. As Taipei does not publicise these sorties at present, Beijing would have deniability in cutting down on them. Such a step could also be easily reversed if Beijing is dissatisfied with the concessions it receives in return. Following assurances from the U.S., China could then begin to limit its activities around the median line and in Taiwan’s ADIZ.

Part of the logic here could be internal. Beijing must understand that shows of military force may reinforce a sense in Taiwan that formal independence would be disastrous (which, as noted, the population already appears to understand) but will not make Taiwanese warm to the idea of unification. If the mainland truly wants to preserve a peaceful unification option, Beijing would have to move beyond muscle flexing, instead increasing the attractiveness of the model it is offering to Taiwanese. It would need to persuade them that their political preferences will be credibly accommodated – something that will take years of reassurance in the wake of what it has done in Hong Kong.

Beijing should also consider the risk that the deterrent effect of Chinese military exercises on a Taiwanese independence bid will diminish – and indeed may already be becoming background noise for Taiwanese society – and could backfire militarily as well. While the PLA’s activities have certainly created dilemmas for Taipei, forcing

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143 The Chinese statement about the Xi-Biden meeting on the sideline of the G20 in Bali in 2022 stated that the two leaders agreed to develop principles to guide the U.S.-China relationship. “Xi, Biden hold candid, in-depth exchange of views on bilateral ties, major global issues”, Xinhua, 14 November 2022.
144 This position has not been reflected in White House statements following Xi-Biden discussions. Chinese statements, however, report that Biden has asserted U.S. non-support for Taiwanese independence in a number of meetings with Xi.
145 “President Xi Jinping Had a Virtual Meeting with U.S. President Joe Biden”, Ministry of Foreign Affairs of the People’s Republic of China, 16 November 2021.
it to divert resources from preparations for a potential full invasion, they have also generated more political will behind building up Taiwan’s defences. Moreover, the potential for an unintended incident is ever present.

But, if Beijing is going to take this step, there will have to be an external logic as well. If nothing else but to manage the domestic optics of appearing to soften its approach on Taiwan, it will need to be able to point to measures by Washington and Taipei that it can hold up as progress. Particularly because of inconsistencies in how the U.S. has talked about its “one China” policy in recent years, it is important that the administration take visible steps to be more disciplined in how it publicly characterises the policy. A full elaboration in a written statement or in remarks by a senior official of the components contained in the Three Communiqués, the Taiwan Relations Act, and the Six Assurances could help set the record straight.

Timing will be a challenge. Such a statement should be made after Taiwan’s presidential election in January 2024, to avoid influencing the conversation in the preceding campaign. U.S. domestic politics may dictate that the statement needs to wait for January 2025, after the next electoral cycle in the U.S., but whoever gains the White House should understand that putting a floor under the sensitive issue of Taiwan with China would serve U.S. interests. The more the Chinese do in terms of ratcheting back military activity around Taiwan, the more latitude Washington will have to deliver a speech that reassures Beijing in tone and content. The elements that Washington chooses to emphasise have always depended on circumstances.

As the U.S. considers what might go into such a statement, officials should consider that what Beijing most wants to hear is Washington’s non-support for independence and non-opposition to peaceful unification. The former has and should continue to be stated; the latter, however, has not been explicitly stated in public by a U.S. administration before. Given U.S. perceptions of its strategic interests in Taiwan, there is almost no chance it will break with this precedent, and that is all to the good: both China and Taiwan could see in it a sign of diminishing U.S. interest in the island, which could prove dangerous. Still, Washington should consider highlighting publicly that its policy has always emphasised peaceful resolution of the differences between China and Taiwan – and therefore focused on process rather than presupposing any particular outcome. For instance, the administration could say it supports a “peaceful and mutually agreeable cross-strait outcome” that has the “assent of the people of Taiwan”.

Both leading up to and following this statement, Washington should turn over a new leaf with respect to its implementation of the “one China” policy – becoming more disciplined and eschewing loud, symbolic actions that are unnecessary and ultimate-

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146 Washington does not want to be seen as backing any one candidate. The various political camps in Taiwan could use a significant U.S. statement of cross-strait policy to criticise one another.
147 In a 1997 trip to China, former Speaker of the House Gingrich did say he holds out hope that the island will be reunited peacefully with the mainland someday. The Clinton administration said he was speaking for himself. Seth Faison, “Gingrich warns China that U.S. would step in to defend Taiwan”, The New York Times, 31 March 1997.
148 This wording was included in the Trump administration’s characterisation of U.S. “one China” policy in 2017 in response to a query from Congress. The phrase “assent of the people of Taiwan” was introduced by President Bill Clinton in 2000. Bush, op. cit.
ly more costly than beneficial to Taiwan. Meetings between U.S. and Taiwanese officials do not have to be made public, and visits to Taiwan by administration officials should be limited.

One of the challenges here will be bringing Congress on board with this approach. The administration will need to take more proactive steps to explain its intentions to lawmakers as well as to elaborate its cross-strait policies. Partisanship in Washington – which will only become fiercer as the 2024 presidential election approaches – means that the Biden administration likely sees extra risk in sharing information that could be used to paint it as soft on China. However it chooses to manage its relations with Congress, the White House cannot sidestep the importance of congressional behaviour to Beijing, which closely follows developments in the U.S. legislature.149

The most straightforward approach (though it is hardly guaranteed of success) would be to increase the number of consultations with relevant committees and individual members of Congress, identifying and working with allies who align with the administration’s approach, and coordinating with messengers that members may be more receptive to, including Taiwanese representatives. For its part, Taipei should be a stronger advocate of its own interests and continue to discourage posturing coming out of Washington that is not to its benefit.150 In particular, the administration should stress the low value – and potentially high costs – of symbolic gestures of support, such as high-level visits to Taiwan or provisions in legislation that elevate the U.S.-Taiwan relationship to an official status. It should not hesitate to press this point upon its co-partisans: it is not clear, for example, that President Biden used the full extent of his leverage with Speaker Pelosi to discourage her visit to Taiwan.151

Finally, as discussed below, both sides will have to respect boundaries with respect to the military dimension of cross-strait dynamics. Given China’s build-up and increasingly threatening posture, it can only expect that Washington will support Taiwan in bolstering its defences for fear that it will otherwise invite Beijing to try its hand at forcible unification. (Crisis Group’s suggestions for what exactly should be done are set forth below.) But the political trappings of this effort will be important. Washington must take care to heed its commitments to Beijing provided under the Three Communiqués even as it seeks to follow through on its commitments to Taiwan. Maintaining communications with Beijing on this issue could help Washington identify red lines to stay away from. Washington could also develop internal guidelines that lay out the limits of U.S. military support for Taiwan.

In general, Washington should avoid the appearance of a return to the ROC-U.S. military alliance that was in place in the 1950s, which would suggest to Beijing that the U.S.-Taiwan political relationship is becoming more official. Ending that alliance and removing all U.S. troops and military assets from the island was a core condition of U.S.-China normalisation, discussed above. As such, the U.S. should make clear to

149 Crisis Group interviews, Chinese scholars, March 2023.
150 Taiwan is generally loath to turn down offers of support from the U.S., its only security guarantor. It did, however, work with Washington to persuade former Speaker McCarthy to receive Tsai in California in April instead of visiting Taiwan.
151 See the discussion of the Pelosi visit in David Ignatius, “President Biden should not run again in 2024”, The Washington Post, 12 September 2023.
Beijing that its current presence of military personnel in Taiwan is not permanent, but on a rotating basis.

Substance over symbolism should also be a key principle. Washington and Taipei should be sensitive to the fact that Beijing will come under domestic pressure to respond if their cooperation becomes too public; in 2021, the highly publicised landing of two U.S. military planes in Taipei whipped up nationalist sentiment in China.\(^{152}\) Washington should refrain from overt shows of military support – such as having the U.S. navy conduct port calls in Taiwan – and seek to conduct trainings in the U.S. rather than Taiwan when it can. If China visibly scales back its military activity around Taiwan for a prolonged period, the U.S. could also consider reducing the number of navy transits through the Taiwan Strait. A first step could simply be to refrain from conducting transits that are too close to the mainland’s territorial sea, a seeming point of sensitivity for China.\(^{153}\)

2. Returning to an interactive cross-strait dynamic

Taiwan’s forthcoming presidential election raises the risk of increased Chinese coercive pressure, particularly if a DPP president is elected, which at this point seems likely. But it can also provide a window of opportunity to recalibrate the cross-strait dynamic. The next Taiwanese president should seek to resume cross-strait dialogue, which remains important not because it will necessarily change Beijing’s cross-strait approach, but because talking can help to reduce the likelihood of miscalculation and misreading of intentions. Dialogue can also facilitate an increase in people-to-people exchanges, which could gradually help ease distrust between the two governments. But a resumption of dialogue fundamentally depends on Beijing’s willingness to return to a more flexible, pragmatic approach.

The path forward for a KMT president is clearer. Should KMT candidate Hou You-yi win, he would presumably commit to uphold the 1992 consensus, opening the door to the resumption of dialogue.\(^{154}\) Of course, a return to the 1992 consensus will pose domestic challenges, given that popular sentiment has turned against it. While cross-strait tensions may subside temporarily, a KMT president will eventually have to fend off pressures from Beijing to begin political discussions, which will create friction in the relationship. Still, a return to dialogue would be a significant positive step.

If DPP candidate Lai Ching-te is elected, the period between election day and inauguration (May) will be important for signalling of intent and preferences between Beijing and Taipei. Besides Beijing’s general distrust of the DPP, Lai’s recent and past rhetoric also raises questions as to whether he will adopt a more confrontational posture toward China. In July, Lai suggested either a desire to make the U.S.-Taiwan

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153 Chinese scholars note that in December 2022 a U.S. P-8A Poseidon maritime patrol aircraft passed through the Taiwan Strait less than 15 nautical miles from China’s territorial sea, the closest a U.S. vessel had come in recent years. Cao Qun, “China-U.S. Air Game over Taiwan Strait: Potential Conflicts and Crisis Management”, Maritime Security and Development Policy Report, Collaborative Innovation Center of South China Sea Studies, May 2023.
154 Hou You-ih has said he supports the 1992 consensus that is consistent with the ROC constitution. Hou You-ih, “Taiwan’s Path Between Extremes”, *Foreign Affairs*, 18 September 2023.
relationship official or an unfamiliarity with U.S. policy when he said: “When Tai-
wan’s president can enter the White House, the political goal that we’re pursuing will
have been achieved”.155 Should he win the election, Lai and his team should seek to
quietly engage interlocutors in Beijing who have authorisation from the Chinese
leadership. Part of the outreach should be focused on identifying a formulation of the
cross-strait relationship that is acceptable to both sides, even if it does not precisely
track the 1992 consensus.

It also will be important to remind Beijing of why it should be interested in dia-
logue. China is interested in demonstrating progress toward unification with Taiwan
to its own domestic audience. Political discussions with Taipei are not possible in the
near term, and Beijing should accept this reality. But, because cross-strait ties have
been curtailed for so long, the baseline for demonstrating progress in a way that could
appeal to the Chinese public is usefully low. A new DPP administration could privately
communicate to China a list of specific issues where it would like to see cooperation
resume and where it thinks progress could be made – in the right conditions – as a
way of nudging Beijing back toward dialogue.

It is not too difficult to imagine such a list. For instance, the parties could resume
cross-strait tourism and student exchange without preconditions. Law enforcement
cooporation appears to have continued despite the absence of high-level dialogue,
and it could deepen.156 Collaboration between the two coast guards, which conducted
a series of joint rescue exercises during the Ma era, could also be explored.157 Even
with an uptick in tensions, the two forces appear to have a working understanding at
sea.158 Given the pressures that Beijing faces from U.S. export controls, Taipei could
also offer to explore with Washington potential areas of flexibility regarding semi-
conductor and chipmaking equipment flows between Taiwan and the mainland.159
Arrangements could be structured so that actual cooperation takes place only after
sufficient reciprocal gestures from Beijing.

Crucially, Beijing will still need assurances that a resumption of cross-strait co-
operation will not come at the cost of legitimising the DPP’s position that Taiwan
and China are not part of “one China”. To this end, if he is elected, Lai should go as
far as Tsai did in offering a gesture to Beijing, by stating in his inaugural speech that

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155 Demetri Sevastopulo and Kathrin Hille, “Washington presses Taiwan presidential frontrunner
156 In February 2023, the two sides worked together to send two individuals suspected of homicide
back to Taiwan. Xie Ligong, “Xie Ligong’s view: The deportation of the suspects in the 88 mass shoot-
ing case to Taiwan will reopen a window of opportunity for both sides of the Taiwan Strait”, The
Storm Media, 28 February 2023 [Chinese].
158 According to publicly available information, Chinese maritime law enforcement has never tried
to stop Taiwan’s interdiction of Chinese fishing vessels in the South China Sea and the Taiwan Strait.
Crisis Group interview, Eli Huang, Taiwanese scholar, September 2023.
159 In August, the U.S. granted Taiwanese and South Korean chipmakers a one-year exemption to
continue selling advance semiconductor technology and equipment to China. Rintaro Tobita, “U.S.
to extend China chip export waivers for Taiwan, Korea chipmakers”, Nikkei Asia, 24 August 2023.
Taiwanese firms are also allegedly helping the Chinese firm Huawei build infrastructure for chip-
making plants. Jane Lee and Debby Wu, “Taiwan to probe suppliers helping Huawei with China
chip plants”, Bloomberg, 5 October 2023.
he will not declare formal independence, that the 1992 meetings are a historical fact
and its outcomes a political foundation for the relationship, and that cross-strait
affairs will be conducted according to the ROC constitution and the Act Governing
Relations Between Taiwan and the mainland.

How Lai, if he is elected, talks about the cross-strait relationship in general will
also be important. He will likely speak to the growing threat that China poses to the
island and the steps his administration will take to shore up Taiwan’s defences. But,
to convey good-will, he could also acknowledge the historical, cultural and people-
to-people ties that connect Taiwan to the mainland, while scaling back rhetoric that
emphasises the de facto separateness of Taiwan and the mainland. Given the friendly
international environment Taipei currently enjoys, lowering the frequency with which
a new government repeats that “Taiwan is already a sovereign, independent state”
should come at an acceptably low cost at home and to its international profile.160

The DPP could also consider publicly elaborating on the constitutional amend-
ment process that a declaration of formal independence would require, thereby un-
derlining that it is currently a political impossibility. Such messaging could be useful
for reassuring Chinese decision-makers and the Chinese public of the improbability
of the outcome they seek to prevent. It would also undercut Chinese propaganda
painting the DPP as incorrigibly extreme.

Parts of the DPP and its voter base will not be supportive of such gestures, but
such shows of circumspection at the start of Lai’s term would be a substantial public
good with political benefits at home and abroad. For one, the majority of Taiwanese
prefer the status quo, and they will want to see that Lai can manage the cross-strait
relationship. Washington, too, will be looking for signals from Lai that he will toe a
moderate line.

But if momentum is to be sustained and relations improved, then gestures from
the DPP must be reciprocated with assurances from China, which Beijing has been
loath to offer since 2016. Given Beijing’s heightened sensitivities around Taiwan, and
the degree to which it has embraced a coercive approach, a major shift in its cross-
strait posture appears unlikely. It is nevertheless important to envision pathways
to repairing relations, if only to remind the parties that they exist. If Beijing wants
a “one China” framing to remain a touchstone of cross-strait relations, while also
strengthening its ties with the party – which at that point will have just won its third
successive term, demonstrating impressive staying power. Beijing’s distrust of the
DPP, however, as well as its desire to be seen as setting the terms of the relationship,
would be significant impediments to this outcome, at least at the outset of a new DPP
administration.

160 Cindy Wang and Joel Weber, “Taiwanese presidential frontrunner talks China and chips: Tran-
script”, Bloomberg, 15 August 2023.
There is another option, however. Beijing could reciprocate DPP efforts to thaw relations in more deniable and reversible ways by resuming cross-strait dialogue and cooperation at lower, functional levels. In February and March, Taiwanese representatives working on cross-strait anti-crime cooperation and tourism were received by representatives in the mainland, after requesting a visit.\(^{161}\) The trip was not a signal that China’s top-level cross-strait approach was shifting. Rather, it reflected direct engagement by the responsible mainland offices themselves, which decided to respond to overtures from Taipei out of their own bureaucratic interests, given that cross-strait cooperation is their raison d’etre.\(^{162}\) Building on this precedent, Beijing could make a good-will gesture by quietly encouraging additional offices to receive Taiwanese counterparts and to begin responding to communications from the Taiwanese side. Such a change would be noteworthy: outreach from Taiwan has generally gone unanswered since 2016.\(^{163}\) The resumption of cross-strait group tourism and student exchanges would also help make the environment less frosty.

Finally, Beijing should reduce the military, economic and political pressures it is putting on Taiwan, particularly if Taiwan’s next president credibly demonstrates that he seeks to repair the relationship. In addition to helping reset relations with the U.S., a reduction of Chinese coercion would make it more likely for a new DPP administration to be interested in deepening cross-strait cooperation and offering additional assurances that Beijing may seek down the line.

B. **Boosting Taiwan’s Resilience**

Alongside assurance, the credible threat of force is the other half of the deterrence equation. While this report has focused on the former, the latter requires at least some discussion, particularly to the extent that it concerns Taiwan’s own security posture.

1. **Taiwan at the epicentre**

As noted, Taiwan sits at the epicentre of geopolitical competition between the U.S., long the dominant Pacific power, and China, which seeks to erode U.S. primacy so that it can achieve its regional objectives. The Chinese military modernisation effort has since the 1990s focused on developing the capabilities necessary to take over Taiwan and ward off U.S. military intervention.\(^{164}\) China’s ability to frustrate and impose costs on a U.S. intervention has grown, as it has developed capabilities that could allow it to attack U.S. forces deploying in the Western Pacific, aircraft carriers, bases, satellites and computer networks.\(^{165}\) China’s plans to expand and upgrade its

\(^{161}\) Crisis Group interview, Mainland Affairs Council official, October 2023.

\(^{162}\) Ibid.

\(^{163}\) Yimou Lee, Sarah Wu and Greg Torode, “Analysis – China’s freeze on Taiwan contact fuels worry as tensions build”, Reuters, 17 November 2022.


\(^{165}\) Saunders and Wuthnow, op. cit.
nuclear arsenal could be intended partly to deter or limit U.S. intervention and use of nuclear weapons in a Taiwan contingency.\textsuperscript{166}

For its part, the U.S. is actively adapting its fighting concepts, military posture and the conventional weapons it has in response to the challenges that Chinese capabilities pose. The Department of Defense has labelled a Taiwan contingency as its “pacing scenario”.\textsuperscript{167} In 2022, it announced a strategy of “integrated deterrence” that emphasises the use of “all instruments of U.S. national power” and cooperation with allies and partners. The strategy also notes the need to develop weapons that are dispersed, mobile, expendable and survivable in response to Chinese capabilities.\textsuperscript{168} For 2024, the department put in a request for $9.1 billion under the Pacific Deterrence Initiative, a 40 per cent increase from the previous year. Much of the Initiative spending is aimed at sustaining U.S. military advantages over China.\textsuperscript{169}

The question of whether and under what circumstances the U.S. would use this new capability has not been resolved, as discussed, and it cannot be if strategic ambiguity is to be sustained. But even so, the public posture of ambiguity requires the U.S. to field a credible military deterrent, which Washington is working apace to ensure that it has. The effectiveness of that deterrent, however, also requires a capable partner in Taiwan. Here, there are question marks.

2. Boosting resilience

As noted above, China’s preferred scenario in the event of an armed invasion is likely a lightning war that quickly subdues the population before any outside power can come to the island’s aid. While U.S. intervention cannot be assumed, if the threat of it is to have any currency, then Taiwan must have the capacity to hold out until it can be mobilised. Right now, Taiwan is not optimally postured to do that. While the cross-strait military balance of power overwhelmingly favours China over Taiwan in quantitative and qualitative terms, there are still steps the latter can take to improve its position.\textsuperscript{170} Under Tsai, Taiwan has increased its defence budget for seven consecutive years and made a number of defence reforms, but more work is needed.\textsuperscript{171} As discussed previously, Washington should support these efforts in limited, low-


\textsuperscript{167} Terri Moon Cronk, “Testimony: DOD is laser focused on China pacing challenge, meeting our commitments under the Taiwan Relations Act”, Department of Defense News, 8 December 2021.


\textsuperscript{170} For instance, Taiwan has about 89,000 ground forces personnel, while China has 420,000 in areas surrounding the Taiwan Strait. “Military and Security Developments involving the People’s Republic of China 2023”, op. cit., p. 185.

\textsuperscript{171} The budget remains limited, however, in comparison to what other nations of similar size are spending. In 2022, Israel spent 4.5 per cent of GDP on defence, while Singapore spent 2.8 per cent. Taiwan’s 2024 budget of 606.8 billion New Taiwan dollars (19 billion U.S. dollars) is its highest ever in absolute amount, but represents only 2.5 per cent of Taiwan’s GDP. David Sacks, “Taiwan announced a record defense budget: But is it enough to deter China?”, Council on Foreign Relations, 30 August 2023.
profile ways that heeds its “one China” policy, seeking to address and manage Chinese sensitivities.

First, Taiwan needs to take bigger, faster steps toward an asymmetric defence strategy aimed at denying a swift Chinese amphibious invasion. Washington has for years encouraged Taipei to do so. In 2017, General Chief of Staff Admiral Lee Hsi-Min proposed such a strategy, labelling it the Overall Defence Concept (ODC).172 The ODC’s core is a recommendation that Taiwan purchase large amounts of small, mobile, lethal, cost-effective weapons that can be deployed easily and would give Taiwan its best odds of holding off a Chinese amphibious landing long enough for U.S. military support to arrive.173 The ODC focuses on keeping the battle in the littoral zone (close to Taiwan’s shores) and the beachhead where the PLA will be vulnerable to Taiwanese strikes, as well as on developing a homeland defence strategy involving the wider Taiwanese population. Also known as the “porcupine strategy”, the ODC’s aim would be to make Taiwan, a mountainous island, into a fortress difficult to penetrate, bristling with small but lethal weapons.

Shifting to an asymmetric strategy remains an eminently logical approach given the island’s resource constraints. But while Taipei pursues such a strategy in name and is taking steps to produce and purchase more small, mobile, lethal missiles and sea mines, as well as smaller vessels, it is not clear it is pursuing a truly asymmetric strategy.174 Taiwan, in practice, still invests a considerable amount in conventional capabilities at the expense of asymmetric ones.175 It is also not clear whether the government has embraced asymmetric warfighting concepts.176 Taiwan’s reluctance to fully embrace an asymmetric strategy may reflect a deep worry in Taipei that moving in this direction would mean putting all of Taiwan’s eggs in one basket – i.e., a strategy that depends on U.S. military intervention, even though such a commitment is, by definition, absent from U.S. strategic ambiguity.

While the existential question of how Taiwan will defend itself is for the island’s authorities to decide, and the unknown variable of U.S. intervention makes it all the harder, there are some considerations that proponents of an asymmetric strategy – in both Taipei and Washington – might impress on those who resist the idea. The first is to make the case, noted earlier in this report, that if the right deterrence structure is in place, there is no need to be fatalistic about a Chinese invasion – at least in the near term. The risk is there, of course, but there is at least a plausible path to

175 A Taiwanese scholar estimated that 50 per cent of the budget was spent on conventional capabilities, while the ideal ratio would be 40 per cent. Crisis Group interview, Su Tze-yun, December 2022. The ROC navy’s acquisitions remain focused on traditional large assets. Tim Fish, “Taiwan’s navy caught between two strategies to counter Chinese threat”, USNI News, 7 June 2023.
deterrence if Washington and Taiwan strike the right notes with their political strategy and the right balance with their defence posture. But Taiwan will need to be in a place where it can hold off an attacking force for a decent interval.

Another oft-heard concern is that an asymmetric strategy does not sufficiently take into account the reality that Taiwan has to fend off increasing pressures from China – especially its activities across the median line and in Taiwan’s ADIZ – which requires conventional military equipment.\(^{177}\) There is a logic to placing deterrence of the existential threat of a Chinese attack over the psychological and reputational costs that these grey zone tactics pose. Nevertheless, Taiwan is very reasonably concerned that if it does not intercept PLA planes that cross the median line, the PLA will perceive weakness and push into the contiguous zone.\(^ {178}\)

But there may be a way to reconcile these tensions, at least partly. In order to free up resources to pursue an asymmetric strategy, Taiwan could be more selective in dispatching aircraft in response to Chinese crossings of the median line, for instance by prioritising breaches in the narrowest part of the strait, or exploring more cost-effective options, such as deploying drones.\(^ {179}\) Informal exchanges among Taiwan, the Philippines and Japan about how to manage grey zone dilemmas – for instance between retired officials and scholars – could also prove useful, given the experience both Manila and Tokyo have acquired in responding to similar Chinese pressures in the South and East China Seas.

Secondly, Taiwan and the U.S. together should maintain the current momentum around building up Taiwan’s short- and medium-range munitions reserves, particularly surface-to-air missiles and anti-ship missiles, as well as sea mines. Given that external resupplies to Taiwan would be challenging during a Chinese military offensive, having a Taiwanese-managed weapons stockpile would be critical for the island’s ability to hold out. That said, policymakers should refrain from building a regional contingency stockpile in Taiwan that is U.S. property and managed under U.S. legal procedures and personnel, as is currently allowed by the 2023 National Defense Authorisation Act. Beijing would likely view that move as a provocative step toward a permanent U.S. military presence in Taiwan.\(^ {180}\)

Thirdly, as a complementary step, Taiwan should improve the training of its regular, conscript and reserve forces. On paper, Taiwan boasts 180,000 active-duty military personnel and a reserve force of about two million. But, training in Taiwan’s military – particularly its army – is reportedly ineffective, with recruits spending most of their time completing menial tasks rather than combat training.\(^ {181}\) Many complain about the program’s shortcomings in preparing them for war and the rigidity of mili-

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\(^ {178}\) Crisis Group interviews, Taiwanese defence experts, December 2022 and September 2023.

\(^ {179}\) Crisis Group correspondence, Ben Lewis, independent researcher, September 2023.

\(^ {180}\) Crisis Group correspondence, Chieh Chung, 25 April 2023.

itary culture. Conscription is highly unpopular. As for the reserves, only a fraction of the members are required to attend an annual refresher course, and only a portion of those actually attend.

The government took a small step toward reforming conscription in December 2022, increasing the period of service from four months to one year and revising the syllabus to include more combat training. It also extended refresher training programs for reservists from one to two weeks. But there remain questions about whether Taiwan has the trainers or equipment needed to carry out the curriculum reform. Expanding U.S. training of Taiwanese troops in the U.S. – rather than in Taiwan – including by the National Guard and under the International Military Education and Training program, as is taking place, is important for providing bottom-up training that has proven successful in other places.

Fourthly, Taiwan will also need to strengthen other forms of resiliency. In particular, because of the near certainty that, in an invasion, China would conduct cyber and electro-magnetic attacks to disrupt Taiwan’s ability to communicate, the island will need to strengthen its infrastructure to ensure that it can remain connected to the outside world after the first waves of attack. Reducing energy dependency by stocking more fuel reserves will also be important. Given the potential power crunch that the island faces in 2025 with the planned closure of its last two nuclear reactors, Taipei should consider postponing the shutdowns, as well as expanding its liquid natural gas storage capacity. The same logic applies to other critical supplies such as food and medicine. Taiwan has achieved only 31.3 per cent self-sufficiency in food,

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182 Crisis Group interview, Chieh Chung, September 2023.
183 According to an audit by Taiwan’s Legislative Yuan (the highest legislature body), between 2016 and 2019, about 700,000-800,000 reservists were required to undergo an annual refresher course, but only an average of 40 per cent of them attended. “Chapter 16 – the recall rate of scheduled reserve military personnel in recent years has been limited, the average annual exemption rate is as high as 20 per cent, which may be detrimental to the maintenance of reserve combat capabilities”, 2019 National Audit overall evaluation report, Legislative Yuan, September 2020 [Chinese].
184 In the past, Taiwan’s conscription system required all men upon turning 18 to serve two (for the army) to three years (for the navy and air force), but the duration was gradually shortened – to one year by 2008, and to four months in 2013. David G. Brown, “Reconceiving Taiwan’s Reserve Forces”, Institute for National Defense and Security Research, 22 June 2020; “2-week reservist program to be expanded to 22,000 men in 2023: Military”, Focus Taiwan, 6 December 2022. As per Taiwanese law, all retired personnel might be recalled for duty up to four times within their first eight years of retirement. See “Press conference reference materials, first week of November 2021”, Ministry of National Defence, Taiwan, 2 November 2021.
185 Crisis Group interviews, Taiwanese defence experts, February 2023.
188 The operating licenses of the two nuclear reactors are set to expire in July 2024 and May 2025. Taiwan, which is heavily reliant on gas, has stores to last eleven days; in the summers, this amount falls to seven days’ worth. Kwangyin Liu, “Taiwan’s looming 2025 power crunch”, Commonwealth Magazine, 28 June 2023.
and it imports about 50 per cent of its active pharmaceutical ingredients from Chi-
na. It should quickly find ways to replenish its stores. A greater investment in civil
defence preparedness, building on past civil society initiatives, would also be wise.

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189 “Composite food self-sufficiency rate – measured in calories”, Agricultural Statistics Visualize
Query System, Ministry of Agriculture, Taiwan [Chinese]; and Eason Chen, Herel Hughes and Sally
190 Joseph Yeh, “Military releases new civil defense handbook amid backlash”, Focus Taiwan, 13
June 2023.
V. Conclusion

For decades, China, Taiwan, and the U.S. were willing and able to set aside their differences over the island’s status and how to settle it. At various turns, tensions rose, but the parties time and again showed a capacity to pull themselves – and one another – back from the edge. The willingness to live with those differences, and with continued irresolution, reflected a shared appreciation that conflict should be avoided and that with patience a peaceful solution might over the long term present itself. The foundation for this status quo was the mutual understanding that while each of the parties would naturally seek to further its own interests in the interim, none would breach the bottom lines of the others.

But changes in the larger environment have made it more difficult for the three parties to stay within the boundaries of this status quo, and it is increasingly the worse for wear. The result is an increasing risk of armed conflict – something that none of the parties appears to want. Taipei, Beijing and Washington can still choose to manage this risk by providing each other with reinforced reasons to believe that waiting for a peaceful solution remains the best path forward. For too long, they have allowed themselves to slip down a long, slow slide into potentially catastrophic confrontation. Now is the time to begin moving step by step in reverse – preserving the status quo and ensuring that the parties do not fritter away the opportunity to keep the peace across the Taiwan Strait.

Taipei/Brussels, 27 October 2023
Appendix A: Map of Taiwan Strait
Appendix B: About the International Crisis Group

The International Crisis Group (Crisis Group) is an independent, non-profit, non-governmental organisation, with some 120 staff members on five continents, working through field-based analysis and high-level advocacy to prevent and resolve deadly conflict.

Crisis Group’s approach is grounded in field research. Teams of political analysts are located within or close by countries or regions at risk of outbreak, escalation or recurrence of violent conflict. Based on information and assessments from the field, it produces analytical reports containing practical recommendations targeted at key international, regional and national decision-takers. Crisis Group also publishes CrisisWatch, a monthly early-warning bulletin, providing a succinct regular update on the state of play in up to 80 situations of conflict or potential conflict around the world.

Crisis Group’s reports are distributed widely by email and made available simultaneously on its website, www.crisisgroup.org. Crisis Group works closely with governments and those who influence them, including the media, to highlight its crisis analyses and to generate support for its policy prescriptions.

The Crisis Group Board of Trustees – which includes prominent figures from the fields of politics, diplomacy, business and the media – is directly involved in helping to bring the reports and recommendations to the attention of senior policymakers around the world. Crisis Group is co-chaired by President & CEO of the Fiore Group and Founder of the Radcliffe Foundation, Frank Giustra, as well as by former Foreign Minister of Argentina and Chef de Cabinet to the United Nations Secretary-General, Susana Malcorra.

Comfort Ero was appointed Crisis Group’s President & CEO in December 2021. She first joined Crisis Group as West Africa Project Director in 2001 and later rose to become Africa Program Director in 2011 and then Interim Vice President. In between her two tenures at Crisis Group, she worked for the International Centre for Transitional Justice and the Special Representative of the UN Secretary-General in Liberia.

Crisis Group’s international headquarters is in Brussels, and the organisation has offices in seven other locations: Bogotá, Dakar, Istanbul, Nairobi, London, New York, and Washington, DC. It has presences in the following locations: Abuja, Addis Ababa, Bahrain, Baku, Bangkok, Beirut, Caracas, Gaza City, Guatemala City, Jerusalem, Johannesburg, Juba, Kabul, Kyiv, Manila, Mexico City, Moscow, Seoul, Tbilisi, Toronto, Tripoli, Tunis, and Yangon.

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October 2023
Appendix C: Reports and Briefings on Asia since 2020

Special Reports and Briefings
COVID-19 and Conflict: Seven Trends to Watch, Special Briefing N°4, 24 March 2020 (also available in French and Spanish).
A Course Correction for the Women, Peace and Security Agenda, Special Briefing N°5, 9 December 2020.
Ten Challenges for the UN in 2021-2022, Special Briefing N°6, 13 September 2021.
7 Priorities for the G7: Managing the Global Fallout of Russia’s War on Ukraine, Special Briefing N°7, 22 June 2022.
Ten Challenges for the UN in 2022-2023, Special Briefing N°8, 14 September 2022.
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