

A strategy for staying out: Recalibrating US support to Taiwan

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When the United States crafted its current policy of strategic ambiguity toward Taiwan, it left open the possibility of directly defending the island—but did not guarantee it. At the time, in 1979, the cost of any U.S. commitment to Taiwan was low. U.S. military dominance in the Taiwan Strait was largely assured, and the U.S. ability to deter and defeat any coercive threat to Taiwan at a sustainable price seemed nearly certain.¹

These conditions no longer hold. China's massive military buildup has shifted the cross-Strait military balance in Beijing's favor, dramatically raising the costs and risks of a U.S. intervention to defend Taiwan. A war over Taiwan today would be expensive and deadly and would carry the potential for nuclear escalation, even if the United States prevailed.

Since Taiwan is not a vital U.S. interest, maintaining the current level of commitment creates economic and military liabilities for the United States that exceed the strategic benefits. The United States should therefore replace strategic ambiguity with an explicit policy of nonintervention, while restructuring its regional posture and engagement to protect core American interests.

This paper develops this argument and outlines an alternative U.S. approach to Taiwan. It proceeds in three sections. The first explains why the current U.S. approach to Taiwan has become increasingly costly and risky. The second outlines why defending Taiwan is not necessary to protect core U.S. interests. The third lays out a nonintervention approach to Taiwan and the process for implementing the policy change.

America's unsustainable commitment to Taiwan

If China were to blockade or attack Taiwan and a U.S. president called on the American military to intervene, it would be among the hardest campaigns ever attempted. To respond to an invasion of the island, for instance, the United States would need to project military power across thousands of miles of ocean, for weeks on end, while penetrating China's anti-access/area denial capabilities.² China's task would also be extraordinarily difficult. It would need to accomplish a daunting amphibious landing in hopes of placing enough personnel on Taiwan to mount a ground assault of the island that takes control of Taiwan's major cities.³

Win or lose, the costs would be astronomical. The death toll would likely be in the tens or hundreds of thousands per combatant, and there would be the risk of nuclear escalation.⁴ Both the United States and China could lose dozens of warships and hundreds of aircraft, at least.⁵ The global economic toll could reach into the tens of trillions of dollars, due to the demands of warfighting and the disruption to major international trading routes, investments, and financial markets.⁶

In the face of such daunting consequences and projections about China's continued military buildup, there are indications that some U.S. policymakers doubt the U.S. ability to defeat a Chinese invasion of Taiwan (and maybe even to deter one at reasonable cost). Most notably, the 2025 National Security Strategy (NSS) acknowledges that "the American military cannot" maintain the capabilities to deter China along the first island chain without the help of allies. Because the contributions of allies to a coalition defense of Taiwan remain unclear (and the United States could very well find itself fighting alone), this is a

worrying admission.⁷ The NSS also acknowledges that China could, in some scenarios, "achieve a balance of forces so unfavorable to [the United States] as to make defending that island impossible."⁸

Some U.S. foreign policy experts and U.S. government officials argue that the solution to China's growing military advantages is simple. They maintain that the United States could reverse current trends and sustain both a credible deterrent and a force capable of defeating a Chinese invasion of Taiwan with more investment in U.S. military capacity and modernization.⁹ However, it is not clear that this is feasible given current U.S. fiscal realities. The current U.S. military budget, much of which is invested or allocated with an eye toward China (defined as the "pacing threat"), stands at about \$1 trillion, or about half of U.S. discretionary spending.¹⁰ Political obstacles make some paths to larger defense budgets—such as raising taxes, reforming entitlements, or simply taking on more debt—more difficult and unlikely than in the past.¹¹ Reallocations within the Pentagon's budget to truly prioritize Asia have been promised for over a decade and now seem both improbable and insufficient to address the challenges at hand. And even if Washington increased defense spending, China could respond in kind. The result would be an arms race that might only increase the risk and potential cost of war.

If Taiwan's continued autonomy were of existential importance to the United States, with direct and severe implications for the security of the U.S. homeland and U.S. economic prosperity, then these costs and risks could be justified. U.S. policymakers would have to find the money needed to maintain a credible deterrent and accept that if deterrence fails, the United States could very well find itself at war to defend this island.

This is not, however, the case. While the cross-strait status quo is beneficial for the United States, maintaining Taiwan's autonomy is not required to protect core U.S. interests. As current

Undersecretary of Defense Elbridge Colby said in his confirmation hearing, Taiwan is “very important” to the United States, but it is not an “existential” interest.¹² This admission alone makes the current U.S. policy strategically unwise because it risks that the United States would enter an economically and militarily devastating and possibly nuclear war with China over an issue that is not of core and vital importance to U.S. physical or economic security.

U.S. strategic interests in Taiwan

U.S. policy currently does not formally articulate a national interest in keeping Taiwan separate from China indefinitely. Instead, the U.S. position opposes unilateral changes through coercion and supports a peaceful resolution of cross-Strait differences—regardless of what that resolution entails. The Taiwan Relations Act, signed in 1979, in fact, suggests that the prevailing American concern at the time was not Taiwan’s autonomy but rather “peace and stability” in the Western Pacific, both because of the region’s economic importance and its strategic location close to U.S. allies.¹³

Recently, however, a growing number of experts and U.S. government officials have suggested that maintaining Taiwan’s autonomy is an important U.S. policy goal in and of itself. Assertions that Taiwan is a “critical node” for U.S. strategic posture in Asia or that Taiwan’s separation from China is vitally important for U.S. economic prosperity have fed a belief that Taiwan’s autonomy is the lynchpin of American military and economic dominance at least in Asia and perhaps globally.¹⁴ The Pentagon’s focus on a U.S. defense of Taiwan as the “pacing scenario” only reinforces the perception that regardless of stated policy, preserving Taiwan’s separation from China is of high importance for the United States.¹⁵

Advocates of Taiwan’s strategic importance justify their position in military and economic terms. Neither holds up to scrutiny. It is certainly true that Washington has interests at stake in Taiwan and that a successful Chinese unification effort would have implications for the United States. But those implications are manageable and do not warrant the costs of war with China or the risks involved in continuing military efforts to prepare for such a war.

In the military domain, some U.S. officials and military analysts maintain that if China were to seize Taiwan, it would accrue significant advantages that would challenge the U.S. ability to protect regional allies, navigate key maritime chokepoints, and access lucrative Asian markets. For many, the biggest concern is that after a successful unification, Beijing could use the island as a kind of military base, stationing submarines and ships on Taiwan’s eastern coast, where deeper water and a forward location would make them harder to track, and setting up missiles and radars in Taiwan’s highest elevations, improving range and targeting for precision strikes. These gains would make it easier for China to project power across the Philippine Sea, putting at risk U.S. forces in Guam and making it harder for the United States to operate freely in the Western Pacific.¹⁶

Subsequent research has challenged the scope of these benefits, however. When it comes to using Taiwan as a base, for instance, even locating its submarines on the eastern side of the island would not allow China to evade all forms of U.S. undersea and satellite detection, at least for now. At some point soon, China’s submarines will be advanced enough to operate more stealthily—regardless of what happens with Taiwan.¹⁷ Basing missiles and radars on Taiwan would offer China some advantages in terms of range and targeting precision, but again, only on the margins, especially given that most Chinese targeting will be done by China’s advanced satellite network in the future.¹⁸ In fact, some analysts argue the ability to dominate water and airspace far into the Pacific is a prerequisite for China to successfully seize Taiwan, not a consequence of it.¹⁹

While it is hard to settle these debates in the abstract, it seems unlikely that China's successful unification with Taiwan would be sufficient on its own to decisively shift the regional military balance in Beijing's favor. This is particularly true if Washington stays out of a war over the island, thus preserving its military power in the region and outside of it.²⁰ In other words, a successful Chinese unification campaign would not prevent the United States from maintaining a balance of power that allows it to match (though not surpass) China.²¹

Still, for some observers, even if taking Taiwan alone would give China only modest military benefits, the broader military implications could be significant. Unification with Taiwan might serve as a jumping-off point for additional Chinese military conquest, for example, of Japan's outlying islands, or it might facilitate more effective Chinese economic and political coercion of its neighbors. With unification accomplished, some analysts argue that China would be able to concentrate the bulk of its military power elsewhere in the region or outside of it.²²

In fact, China's road to regional hegemony would be quite difficult (though not impossible), due to both geography and the nationalism of its neighbors.²³ Even operating from Taiwan, taking countries like Japan, South Korea, or the Philippines by force (or even seizing Taiwan's outlying islands) would be exceedingly challenging for China, given the region's maritime geography and these countries' growing defenses. China might have more luck with economic coercion and political control, but it still seems unlikely that countries like Japan and South Korea would choose to bandwagon with China so easily. These states have long traditions of independence and tensions with their Chinese neighbors. More likely, these countries would react by arming themselves to the teeth, strengthening their position vis-à-vis China. This would not be a bad outcome for the United States and could lessen the overall U.S. security burden.

China's economic and industrial gains from a successful seizure of Taiwan would be more substantial. There are two considerations: U.S. access to markets in the region and the fate of Taiwan's semiconductor industry, on which both the United States and China continue to depend.²⁴ Trump's 2025 NSS articulates both concerns, noting that the island's economic importance is a result of "Taiwan's dominance of semiconductor production, but mostly because Taiwan provides direct access to the Second Island Chain ... Given that one-third of global shipping passes annually through the South China Sea, this has major implications for the U.S. economy."²⁵

Both issues deserve serious examination. It is true that Taiwan lies on important global shipping routes, but even if China seized Taiwan and cut off U.S. access to the Taiwan Strait or the South China Sea, it is unlikely that this would successfully shut the United States out of Asia's economic markets entirely. With these waterways closed, the United States could still safely navigate the straits in Southeast Asia and operate in the Philippine Sea to the east of Japan to access trading ports in East Asia. Furthermore, it is not clear why China would seek to block the United States from access to the region's waterways and markets in the first place, since disrupting global trade in this way would be militarily difficult and would harm China's own economy in significant ways.

Loss of access to Taiwan's advanced semiconductors would be a more serious blow to the United States, but this alone is not a reason to maintain the current U.S. commitment to Taiwan. Importantly, the risk that war over the island might cut off access to Taiwan's semiconductors does not only fall on the United States. Since Beijing also depends on TSMC, the world's largest chipmaker, at least for the time being, it is likely deterred from attacking the island to maintain access to this technology. Beijing understands that a war over the island would probably destroy Taiwan's semiconductor manufacturing facilities and equipment.²⁶ Furthermore, the intellectual

property that TSMC uses does not live on the island and could be withheld if the factories did fall into Chinese hands.²⁷

The key question is one of relative dependence. Although U.S. companies continue to be TSMC's largest customers, the United States also owns the intellectual property and the software used to design the most sophisticated semiconductors. This gives it an advantage in building domestic resilience in this area. China's indigenous capabilities continue to lag behind. If a war were to result in loss of access to TSMC, the United States could likely recover more quickly.²⁸ It would need to expand its manufacturing and packaging capacity (both of which would take time), but it would have access to the required technologies, while, at least for now, China would not. U.S. vulnerability in this area will also decline over time. According to industry estimates, by 2032, the United States should be able to produce about 30% of the most advanced chips, giving it additional resilience in this area.²⁹ Some Trump administration officials have put forward even more bullish timelines.³⁰ China's dependence on TSMC, then, gives the United States a window to prepare its own domestic production capabilities.³¹

To summarize, a change in the cross-Strait status quo would be survivable for the United States. Even if China successfully seized Taiwan after the United States declined to defend the island, core U.S. interests would be protected, and the United States would retain presence in Asia's economic and political domains.

China would undoubtedly get some military benefits from unification, but the United States would still have advantages in intelligence and the space and undersea domains. Moreover, it could still ensure U.S. freedom of navigation across most of the Western Pacific and the security of the homeland with investments along the second island chain in Guam, Palau, Micronesia, the Marshal Islands, and Australia. U.S. access to key maritime chokepoints and economic markets would be preserved, even if China restricted

passage through the South China Sea. Some U.S.-China economic decoupling might occur if trade links were disrupted, but over time, markets and trade routes would adjust. The United States might find itself trading much more with Latin America or rediscovering its economic ties with Europe, but its long-term economic prosperity would remain robust.³² The United States would need to rapidly scale up domestic production of semiconductors, but the scale of any disruption would depend on the timeline, being much less pronounced as the United States builds domestic capacity. The consequences of a successful Chinese seizure of Taiwan are, therefore, manageable.

To give itself the ability to protect U.S. core interests while staying out of war over Taiwan, however, the United States will need a new policy toward the island. This must be paired with a new regional strategy intended to reassure other U.S. allies while stabilizing U.S.-China ties. The remainder of this paper outlines such a strategy.

A nonintervention approach to Taiwan

The goal of a new U.S. policy toward Taiwan should be to end the U.S. commitment to the island, shifting the burden of its defense to Taiwan itself and adjusting the U.S. regional posture to protect U.S. interests, no matter how cross-Strait differences are resolved. The new U.S. position should explicitly be one of nonintervention, in which the United States would state definitively that it would not send military forces to fight for Taiwan, but might offer intelligence and logistics support in the event of a conflict, to the extent it can do so without getting pulled into a war.

To support this policy and preserve U.S. economic interests, the United States will need to reposition U.S. forces, build resilience in high-tech manufacturing at home, and invest in the physical and economic security of allies like

Japan and the Philippines. Because this shift will take some time to implement, Washington also has some stake in delaying a Chinese military invasion of Taiwan in the near term, using economic and diplomatic tools, and giving China incentives to move toward a peaceful resolution of cross-Strait differences.

Shifting to a nonintervention stance when it comes to Taiwan would require acknowledging that without a direct U.S. intervention, Taiwan might not be able to deter a Chinese invasion or defend itself should China attack. Taiwan has some advantages, including its geography—it is surrounded by water and its terrain is inhospitable to invaders. Moreover, if Taiwan adopted a truly asymmetric defense strategy and invested heavily in its military and defense industrial base, increasing its stockpile of missiles three or fourfold, acquitting million of drones and acquiring the HIMARS and air defense systems promised in pending U.S. aid packages, it might be able to persuade China that it is simply too risky and too costly to try to achieve unification by force, at least for the foreseeable future.³³ But moving in this direction will require significant investment from Taiwan and large amounts of political will. At this point, it is not clear that either the necessary funds or the political initiative exists.³⁴

Critics will argue that a U.S. nonintervention strategy effectively consigns Taiwan to a future under China's thumb. According to this group, even if Taiwan invests heavily in its own defense, spending 5% or even 10% of GDP on a military buildup, it will still not be able to credibly deter, much less defend, against a Chinese attack or even a blockade intended to choke the island without direct U.S. support. Fully evaluating this claim's accuracy is difficult, but in the end, the answer is not relevant to U.S. strategic calculations. It is not in the U.S. interest to incur the risks or costs of a potential future war with China over Taiwan, even if this means China achieves unification.

It is also possible that Taiwan might choose not to invest more heavily in defense but instead to pursue a modus vivendi with China, as has been suggested by some opposition politicians. This might result in a political resolution of cross-Strait tensions. Such an outcome may be more likely if the United States reduces its support, as many argue that Taiwan's will to fight is based on its belief in a U.S. backstop. Ultimately, the United States should accept such political accommodation and let the island's people determine its path forward and take steps to protect U.S. interests, regardless of what Taiwan chooses. This would be consistent with U.S. policy and is possible, so long as Washington takes steps now to make its own regional position more resilient.

TIMING

Ideally, the U.S. shift from its current Taiwan policy to one of nonintervention would be phased to give Taiwan time to build the military capabilities necessary to delay, deter, or, in a best-case scenario, deny China its military objectives, and the United States time to reassure and strengthen relationships with regional allies.

This may not be possible, however, leaving U.S. policymakers with no choice but to make a faster policy change than might otherwise be desired. For starters, a phased approach creates an interim period of high risk. Paying the costs to defend Taiwan is not in U.S. interests, nor is continuing to incur the risk of such a war by maintaining the current policy of strategic ambiguity any longer. As long as U.S. policy and posture remain unchanged, there is a reasonable chance that if Taiwan is attacked, the United States will have to intervene, either because it is dragged in by a Chinese strike on nearby U.S. forces or due to political factors and inertia, as noted above. Because these risks and costs exceed the benefits of the status quo for the United States, Washington should shift its posture and its policy as quickly as feasible to remove Taiwan as a liability to U.S. strategic interests.

A phased approach would also be difficult. Once the United States begins force posture changes to support a nonintervention stance, its old position of strategic ambiguity will lose its credibility, and its intentions will likely be telegraphed to allies and adversaries, in the region and outside it. Posture changes will also make it harder for the United States to defend Taiwan, forcing a policy change, if only due to feasibility.

Finally, while giving Taiwan time to arm itself sounds good, it is not clear that Taiwan is ready and willing to invest what would be required to build a credible deterrent in a reasonable timeframe. The slowness of U.S. defense production is partly to blame, but the bigger problem is that political polarization in Taiwan's government seems likely to hold up the funding that would be required to finance weapons purchases on the scale needed.³⁵

If a phased approach is not possible, then the United States should make no formal announcement of its shift to a nonintervention policy initially, as a sharp policy change could be destabilizing. Instead, Washington should simply move ahead with the steps needed to make a nonintervention approach viable as quickly as feasible, including changing its military force posture in the region and making investments to secure its interests in the region, including in relationships with allies. At some point, a formal notification to allies and to China of the U.S. shift in policy will be required, but it should occur only once U.S. forces are repositioned, and initial moves to reassure regional partners are underway. By that point, the direction of U.S. policy should be clear, and any announcement will simply affirm strategic adjustments already largely completed.

IMPLEMENTATION

To shift to a policy of nonintervention toward Taiwan, the United States will need to do five things.

1. Reposition U.S. forces away from vulnerable locations near China's coast, moving them back to the second island chain.

2. Reinforce preparedness of key allies like Japan and the Philippines.
3. Shift responsibility for Taiwan's defense to Taiwan by encouraging an asymmetric defense and offering arms sales, intelligence, and investment.
4. Accelerate semiconductor reshoring.
5. Stabilize the U.S.-China relationship by seeking reciprocal de-escalation and encouraging nonmilitary solutions to the Taiwan issue.

First, the United States will need to adjust its posture to reduce the risk that it might be drawn into war through miscalculation, to make its own position more survivable and resilient to future Chinese challenges, and to secure U.S. economic interests in the region and U.S. relationships with other allies.

At present, if China were to decide to attack Taiwan or even to try to enforce a blockade, it might be difficult for the United States to stay out of the conflict. U.S. forces are currently based near Taiwan, in Okinawa, Japan, and Luzon in the Philippines. There are even 500 military trainers based on Taiwan. Many experts expect that in case of a full-scale invasion, China might move to attack U.S. bases in Japan first, to limit the U.S. ability to offer support.³⁶ Even if Beijing did not take this step, any casualties among U.S. forces on Taiwan could be enough to drag the United States into war. Right now, these forces are intended to deter Chinese military action, but if the United States were to adopt a nonintervention strategy, having a tripwire in place would be unnecessary and undesirable.

To remove the risk of accidental war and make the U.S. regional posture more resilient, Washington should move U.S. forces from Taiwan and locations nearest China's coast to more secure sites elsewhere in the region. For example, the United States should move most U.S. military personnel and hardware out of bases on Okinawa and shift them to U.S. bases in

northern Japan, Guam, and other second island chain locations. In addition, the United States might move U.S. soldiers away from Luzon and to other U.S. operating locations in the Philippines while also removing provocative offensive platforms like the Typhon missile system from the first island chain. Washington should also take U.S. military trainers out of Taiwan and return them to the United States, where they could continue training Taiwanese soldiers if desired.³⁷ These changes would reduce the number of U.S. military personnel and the amount of hardware within range of Chinese short- and medium-range missiles. They would, thus, be de-escalatory and shift the United States to a more defensive and sustainable regional posture, but one that is still well-calibrated to protect U.S. interests.

The United States should also make targeted investments to emphasize flexibility and power projection with a light footprint to secure U.S. access to regional economic markets and maritime routes while also reassuring regional allies of the U.S. commitment to them. For example, while the United States might reduce the U.S. military presence in Okinawa, it could increase air and naval presence in northern Japan. Keeping submarines and naval vessels in Australia, South Korea, and Singapore, and conducting periodic transits through Southeast Asian maritime chokepoints, would also ensure freedom of navigation for commercial and military vessels across the Western Pacific. The Pentagon should reinforce and expand military infrastructure along the second island chain, including airfields and ports, and increase the forward positioning of uncrewed air and sea vessels and long-range bomber aircraft.

Of course, these moves alone would not rule out the risk of unintentional escalation with China, especially if Beijing increases its military coercion of Taiwan or military pressure directed at U.S. allies. Political engagement with China will also be needed.

Second, to demonstrate its commitment to other allies and reduce the blow to U.S. alliances from a changed U.S. position on Taiwan, the United States should take steps to reinforce the preparedness of key partners like Japan and the Philippines so that they are better able to defend themselves. This will mean prioritizing these two countries for defense sales, coproduction arrangements, and military exercises. Especially important will be that these countries acquire asymmetric capabilities that they can use to resist Chinese coercion.³⁸ Joint planning, for example, on how Japan and the United States can cooperate to protect commercial shipping in the region in the event of a Chinese blockade of Taiwan, would demonstrate U.S. long-term and continuing support to these allies and the region. These activities could also reduce allied uncertainty or fears that the United States intends to accept a Chinese sphere of influence that includes all of Asia. Finally, to help regional allies resist Chinese economic and political coercion, the United States will need a revitalized economic and diplomatic strategy to increase investment, trade ties, and political support.

Building allied preparedness and investing in allied relationships will take time—longer than military posture changes. This means that the U.S. formal shift to a nonintervention stance will likely come before efforts to bolster allies are complete. As a result, the United States will want to offer clear signs of bipartisan support for continuing activities aimed at ally resilience.

Third, the United States will need to recalibrate its relationship with Taiwan. It would be ideal if the United States were able to discuss the future of its support to Taiwan privately, including what it will not provide—direct military support—and what it might provide, including intelligence and logistics support. This would allow Taiwan to make informed decisions about its own investments ahead of any public announcement. However, it is likely that anything that is told to Taiwan in private will leak. Washington should still communicate clearly with Taiwan about its intention to burden-shift, but it should also carefully

consider framing. Clear messaging to Taiwan's leaders and U.S. allies that stresses continued U.S. commitment to the region and to its allies, a preference for peaceful resolution of cross-Strait differences, and long-term U.S. interests in Asia will be important.

To live up to the terms of the Taiwan Relations Act, Washington should be willing to continue to supply Taiwan with defensive weapons and even to offer Taiwan a priority place in the arms production queue. It can encourage Taiwan to spend more on defense and offer certain types of military and economic assistance that could help the island resist Chinese gray zone coercion. For example, it could help guide Taiwan's defense investments by limiting defense sales to materiel that will support an asymmetric defense strategy. It could make some types of military assistance conditional on Taiwan's level of defense spending or on reforms to Taiwan's military recruiting and training.³⁹

The United States could also help Taiwan with investments in its critical infrastructure, build communications networks that can help the United States share intelligence with Taiwan, or support the development of logistics hubs that might enable U.S. resupply during a conflict, if a president deemed this to be in U.S. interests. It could also facilitate investments in Taiwan's defense industrial base to help Taiwan produce more of its own defense equipment.

However, if Taiwan's government decides to spend less on defense or pursue a political modus vivendi with China, the United States should not interfere. This means accepting that China may achieve its unification objective, either through political accommodation or through coercion of some kind. Washington can push for the former but should avoid intervention even if China pursues its aim with force.

Fourth, the United States will have to address its dependence on Taiwan for semiconductors, building resilience and shifting as much production as possible to the United States or allies

elsewhere. As noted above, in the near term, China is also dependent on semiconductors produced in Taiwan, which may give Beijing reason to defer a move on Taiwan. This gives the United States a narrow window to build its domestic resilience in this area. It is already on this path. Yet it should seek to accelerate the timeline where possible, investing in both skilled workers and production capacity, while also stockpiling older chips as a "good enough" fallback option to mitigate economic damage in case of temporary shortages in more advanced chips. Because this process will take some time, the United States has some incentive to delay any military conflict in the Taiwan Strait for as long as possible. It can do this with diplomatic or economic initiatives.

Finally, shifting to a nonintervention approach will require adjusting the U.S. relationship with China as well. The United States should aim to use political and economic tools to encourage China toward political solutions to the Taiwan issue or at least to delay any military moves for as long as possible, even as it steps back from its commitment to the island.⁴⁰ Though the United States would give up some of its leverage by reducing its military presence along the first island chain, the United States still has some ability to influence Chinese behavior. It could, for example, seek reciprocity from China for some of its posture moves, especially those of high value to Beijing. China might agree to reduce its military exercises near Taiwan in return for commitments on the removal of U.S. intermediate-range missiles from Japan and the Philippines.

In the political domain, Washington should indicate that in shifting its position on Taiwan to one that avoids direct military intervention, the United States is not changing its stance on the importance of noncoercive resolution to cross-Strait differences or planning to cede all of Asia to China's influence. The United States could make clear that there would be steep economic and diplomatic consequences for China if it were to use military force against Taiwan. The United States could also offer China incentives

to support peaceful approaches to unification, including better trade terms, reduced tariffs or sanctions, or access to U.S. technologies.

Political signals could be used to urge Chinese restraint as well. Reaffirming that the United States does not support Taiwan's independence would be an easy first step. Harder but more meaningful to China (and so more useful as a possible bargain with Beijing) would be a more significant shift in U.S. policy, such as stating that Washington opposes Taiwan's independence.⁴¹ Such moves might be tied to a Chinese commitment to engage in a serious cross-Strait dialogue aimed at finding political solutions to disputes. This might not prevent war, but it could delay a conflict by encouraging Chinese patience, thus serving U.S. interests.

Of course, this strategy comes with some risks. The biggest is that any change in U.S. posture accelerates and worsens cross-Strait escalation rather than lessening it. Reducing U.S. military support for Taiwan could cause Taiwan to act rashly, such as by seeking a nuclear weapon—a move that would nearly guarantee a Chinese strike. Alternatively, it might be China that acts quickly, seeing a window of opportunity and no obstacles in its way, to make a military move on Taiwan or simply to double down on political and economic coercion.

But these outcomes are not guaranteed. Even if the United States acknowledged that it would not intervene, China would still have to contend with a range of geographic, military, and economic challenges were it to initiate an invasion of Taiwan.⁴² Unless Beijing is fully confident of its chances for success and so long as the door to unification does not appear to be closing, it is hard to see why China's leaders would deviate from the current strategy of increasing coercion to shrink Taiwan's littoral spaces and flexibility.⁴³ If anything, the United States stepping back from its long-time support to Taiwan should reduce China's concerns and make Beijing more patient, rather than less.

The bottom line is that the United States' interests are not served by keeping its military forces and its position in Asia entangled in Taiwan's fate. For every argument that a reduction in U.S. military power might increase the risk of war, there is an argument that it is the presence of U.S. military power so close to China's coast that is the true source of cross-Strait instability. It is hard to say whether retrenchment will increase the risk of war or create a path to peace. But removing an implicit U.S. security guarantee would force Taiwan to confront its geopolitical reality more directly. The United States will be better off with a policy that explicitly rules out a direct defense of Taiwan.

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