Thinking through America's baseline priorities on Taiwan

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Taiwan's future lies at the heart of the U.S.-China geopolitical rivalry. Much of the debate in Washington over how—or even whether—to counter Beijing's aggression against Taiwan is rooted in implicit and often poorly specified assumptions about why Taiwan matters to both countries. For the United States, the rationales for supporting Taiwan have shifted over the decades, from its strategic location to its symbolic value, economic importance, and democratic political system—but all these interests remain relevant today. For the Chinese Communist Party, by contrast, the "Taiwan question" has always been primarily about sovereignty and regime legitimacy, and its chief priority is to compel acquiescence to Beijing's right to rule over the island and its people. And in Taiwan, while there is no evidence of rising support for unification, neither is there a groundswell of support for de jure independence if it triggers a war.

Thus, there remains space to preserve peace across the Taiwan Strait. Neither the United States nor the PRC is willing to go to war with the other to change the cross-Strait status quo. Instead, as they have been for decades, Washington and Beijing remain engaged in a long-term contest of coercive bargaining over Taiwan's status. The intentions, capabilities, and bottom lines of both sides are inherently ambiguous, and both are trying to shape their adversary's perceptions to their own advantage. To make the American commitment to preserving the peace more credible, U.S. strategy should seek to clarify the vital American interests at stake in Taiwan to the American people, to Beijing, to partners and allies, and to the Taiwanese people themselves.

Why Taiwan matters to the United States

Since 1950, the United States has been Taiwan's main security provider. Over the last 75 years, successive U.S. administrations have justified this support with at least one of four rationales: geography, symbolism, economic interests, and political interests. Although the weight given to these factors has shifted over time, all remain relevant concerns to the United States today.[1]

GEOGRAPHY

First, Taiwan matters because of its strategic geography.[2] It lies in the first island chain directly south of Japan and north of the Philippines. Both countries are long-standing U.S. defense treaty allies, which have territorial disputes with Beijing—Japan over the Senkaku Islands, the Philippines over the South China Sea—that have become increasingly acrimonious in the Xi Jinping era. The People's Republic of China's (PRC) control over Taiwan would weaken both states' defense postures and could force a fundamental restructuring of the U.S.-led security order to counter Beijing's revanchism. Taiwan also straddles sea lanes through which about $2.5 trillion in trade—one-fifth of global trade—passes through. That number includes nearly a third of Japan's trade and over a quarter of South Korea's, as well as most of their energy supplies, creating a potential chokepoint for these important U.S. economic partners—and for the United States.[3]

Given Taiwan's strategic location, Washington has had a long-standing goal dating back to the Truman administration of preventing any force hostile to U.S. interests from occupying the island. This concern faded somewhat after 1979, as the United States switched diplomatic recognition to the PRC, and later as the Soviet Union collapsed and the Cold War ended. But it has reemerged in recent years as a point of emphasis for some observers, who argue that PRC control over Taiwan could tip the regional power balance decisively in Beijing's favor.[4] For instance, Taiwan absorbs much of the strategic planning and modernization efforts of the People's Liberation Army (PLA), and if the PRC were unconstrained by the need to deter Taiwan independence, it might be more aggressive in asserting territorial claims in other parts of the region. It could also more easily expand its power projection capabilities to become a global, rather than simply a regional, military rival. Even if Beijing continued to limit most of its military activities to the Western Pacific, PLA forces operating out of Taiwan—and especially the use of Taiwan's east coast ports by the PLA Navy submarine fleet—could have dire implications for the U.S. Navy's ability to operate and sail in the waters of the region.[5]

SYMBOLISM

Second, Taiwan matters because of its symbolic value as both an alternative economic and political model to the PRC and a signal of U.S. credibility. Ever since the United States intervened in June 1950 to prevent a PLA invasion, Taiwan has been a chief beneficiary of the U.S.-led regional order. The United States provided Taiwan with significant aid and preferential access to U.S. markets. As a result, Taiwan's economy grew rapidly, and the island was gradually transformed from a poor, insecure, authoritarian regime into a rich, resilient, liberal democracy that today is a high-tech economic powerhouse.

Taiwan has also become an important symbol of the U.S. commitment to maintain regional peace and stability despite China's rise. After the switch in diplomatic recognition from Taipei to Beijing in 1979, it became U.S. policy to attempt to integrate the PRC into the regional order as well. But that policy proceeded without abandoning Taiwan, and the United States continued to oppose a military resolution of Taiwan's disputed status, as the Taiwan Relations Act and subsequent U.S. policy make clear. In the face of the PRC's growing comprehensive power and coer-

cive activities, Washington's continued support for Taiwan stands as a costly signal of American resolve to uphold the regional order.

ECONOMIC INTERESTS

Third, Taiwan's economy is now vital to the United States. Taiwan in 2024 was the seventh-largest U.S. trading partner, with about $185 billion in bilateral trade.[6] Taiwanese companies are dominant players in the global semiconductor industry, and today over 90% of the leading-edge chips used to power everything from iPhones to automobiles are manufactured by Taiwanese firms in Taiwanese factories. This list includes not only the globally strategic TSMC, but also a whole ecosystem of firms with specialized expertise in design, testing, and packaging, and involvement in fabricating memory, logic, application-specific integrated circuits, systems on a chip, and analog and mixed signal chips.

For all the effort Washington has made to mitigate this strategic vulnerability—subsidizing chip production, diversifying supply chains, and cajoling companies to build factories in the United States—the changes that have resulted have been only at the margins. American companies still rely heavily on Taiwan-made chips, and this dependence has only increased in recent years with rapid advancements in artificial intelligence; in December 2025, the value of Taiwan's total exports to the United States surpassed those of the PRC for the first time in many years, driven mostly by surging demand for semiconductors.[7] As a consequence, access to Taiwan's tech products is now a central element of U.S.-China tech competition.

The potential economic costs of a military conflict over Taiwan are enormous. Taiwan's dense tech ecosystem would probably not survive military action, and the impact on the United States of this destruction has been conservatively estimated at $2 trillion.[8] Conversely, if the PRC were able to assert control over these world-leading industries without significant economic disruption, Beijing would acquire a massive new chokepoint to exploit in its economic competition with the rest of the world. The PRC's willingness to use its dominance in rare earths to exert leverage over trading partners offers an ominous preview of what this world would be like.[9]

POLITICAL INTERESTS

Fourth, Taiwan's democracy still matters. The U.S. interest in Taiwan's political development has never been solely about Taiwan itself, but also about presenting an attractive alternative to the path the PRC has taken over the last 75 years. Taiwan today is a liberal democracy in a part of the world where that is rare, and it is also a Chinese-speaking democracy that offers a stark contrast with the Marxist-Leninist party-state system across the Strait. A prosperous, democratic Taiwan stands as a powerful counterpoint to claims that the Chinese Communist Party must have a monopoly on power to prevent political chaos and economic calamity.[10] Taiwan's people have never been subject to PRC control, and they remain far richer on a per-capita basis, with a far lower level of inequality, than their mainland Chinese counterparts.

Taiwan is also better governed. Its democratic system managed to contain the spread of COVID-19 and enjoy a long period of zero domestic transmission of the virus without the draconian lockdowns and pervasive repression employed by Beijing.[11] The Taiwanese state imposes a far lower tax burden on its citizens and provides much more comprehensive social services in return than does the PRC.[12] The destruction of Taiwan's democracy would snuff out the possibility that advocates for political reform on mainland China could take inspiration from Taiwan, as Hong Kongers did prior to 2020.[13] And it would almost certainly accelerate the decline of democracy in the region and beyond.[14]

Why Taiwan matters to the Chinese Communist Party

For the Chinese Communist Party (CCP), the "Taiwan problem" is primarily about sovereignty. The CCP justifies its monopoly on power by asserting that it is redressing China's historical weakness and returning its borders to those of the Qing empire at its greatest extent, which included Taiwan—what it calls "restoring territorial integrity." The party's legitimacy also rests on the idea that the PRC replaced the Republic of China (ROC) regime as China's sole representative in the international system. For decades, the CCP's chief objective toward Taiwan has been to compel international acceptance of the PRC's claim to exclusive sovereignty over the island and its people.

However, Taiwan's current de facto autonomy is not itself a cause for war for the CCP. The party has survived in power in mainland China for 75 years without exercising control over Taiwan, and it has prospered for the last 45 years in part because it did not exercise control.[15] In 1979, CCP leaders chose to tolerate Taiwan's continued autonomy (and accept an implicit U.S. security backstop) in order to establish diplomatic relations with the United States. That decision produced massive benefits for the regime by opening the door to the PRC's participation in the global economy. As long as those benefits continue to flow—as they did in 2025, for instance, through a $1.2 trillion trade surplus with the rest of the world—and as long as the United States can credibly threaten to limit those benefits if Taiwan is attacked, then the CCP has a compelling reason not to seek unification through military force.

Instead, what is a cause for war is formal independence for Taiwan—that is, a de jure declaration that Taiwan is not "part of China," and wide recognition of Taiwan as a sovereign state in the international system. The CCP has spent several decades insisting to both domestic and foreign audiences that unification is inevitable and that the "Taiwan question … is at the core of China's core interests."[16] Anything that definitively ends the possibility of unification is a threat to the regime's survival, and under the last four leaders, going back to Deng Xiaoping, the CCP has gone to great lengths to signal its resolve to prevent independence.[17]

Finally, under Xi Jinping, there is more continuity with his predecessors than is commonly appreciated in the United States. Beijing's approach has continued to follow the dual-track strategy put in place under Hu Jintao in 2005: "soft" economic inducements and selective engagement with China-friendly forces on the island, paired with "hard" threats to deter moves toward independence and maintain Taiwan's diplomatic isolation. Xi has modified Taiwan policy only on the margins, as a reaction to the shifting U.S.-China power balance and trends in Taiwan domestic politics and public opinion.[18] The claim that Xi has "shown an impatient determination to resolve Taiwan's status in a way that his predecessors never did,"[19] and that he has moved PRC policy from deterring Taiwan independence to compelling unification,[20] are not well substantiated.[21]

Chinese analysts still describe Beijing's Taiwan policy as having two parts: "opposing Taiwan independence" (fandui taidu) and "promoting peaceful unification" (tuijin heping tongyi) rather than "compelling" it (poshi tongyi).[22] And the increase in PLA military activity near Taiwan began not with Xi's rise to general party secretary in 2012, but instead followed the inauguration of the Democratic Progressive Party's Tsai Ing-wen in 2016. It is Beijing's perceptions of shifts in domestic politics in Taiwan and U.S. policy, rather than Xi's personal timeline or perceptions of a closing "window of opportunity," that are the primary drivers of its actions toward the island.[23]

HOW TAIWAN'S DEMOCRACY MATTERS

Ever since Taiwan completed its transition to democracy in 1996, public opinion there has also mattered for the trilateral relationship. Taiwan's leaders are accountable to their own citizens; no elected official can stray too far from mainstream opinion without risking an electoral backlash, and both Beijing and Washington have limited influence over what Taiwanese think. As the Kuomintang strategist Su Chi has put it, democratization has produced a "tail that wags two dogs."[24]

The basic patterns from public opinion in Taiwan are clear. First, there is almost no support for joining the PRC under "one country, two systems"—the formula that Beijing has offered for "peaceful unification." There is slightly higher (5%-10%) support for unification with "China" at some point in the future, and there is a significant minority (20%-30%) that supports independence now or at some point in the future.[25] The more interesting questions are the conditional ones. About 70% of Taiwanese would support independence if it did not result in a war with the PRC. But about 40% would also support unification if the PRC's political and economic system looked more like Taiwan's—that is, if living standards were similar, and if it were a democracy.[26] Finally, Taiwanese "will to fight," whether measured as support for increased defense spending, lengthening conscription, contributing to civilian resilience, or enlisting and taking up arms, depends crucially on the belief that the United States would come to Taiwan's assistance. Those who are confident that the United States would respond to the use of force are far more willing to support costly measures to strengthen Taiwan's defenses than those who are not.[27]

The patterns in Taiwan's party politics are less clear, and Beijing can still find reasons for optimism there. For the last decade, there has been a consensus among outside observers that the China-friendly Kuomintang (KMT) is in long-term (perhaps terminal) decline, and the Democratic Progressive Party (DPP) is the new natural ruling party. Moreover, there is an expectation that each subsequent generation is more likely to identify as exclusively Taiwanese (as opposed to Chinese) and to support independence. However, these trends are no longer so obvious.[28] Although the ruling DPP won its third consecutive presidential election in 2024, Lai Ching-te only obtained 40% of the vote, and the party lost its majority in the legislature. The KMT's support rate has recovered from its 2020 nadir, and the Taiwan People's Party (TPP), which emerged as a centrist "third force" in 2020, has surprised many observers by cooperating closely with the KMT to check the DPP government. Most startling are recent trends in public opinion among the youngest adults, who appear to be less supportive of the DPP and less supportive of independence, and who hold more positive impressions of mainland China than older cohorts.[29]

To sum up the current picture: the DPP is not dominant, the KMT is not dead, the TPP's future is uncertain, and a majority of voters under 30 are disillusioned with the DPP and open to alternatives. The electorate's long-standing pragmatism will remain a significant check on elected leaders from all parties. While there is no evidence of rising support for unification, neither is there a groundswell of support for de jure independence if it triggers a war. Combined with the shifting power balance across the Strait, Beijing still has reasons to believe that long-term trends favor its interests.

What should the United States seek to do, and not to do, in its Taiwan policy?

I have argued that the United States has a vital interest in preserving Taiwan's de facto autonomy. Likewise, the PRC has a vital interest

in limiting that autonomy. The CCP leadership—and Xi personally—can live with a Taiwan that is not moving toward de jure independence, as long as the path to eventual unification is not irrevocably blocked. To put the point bluntly: neither the United States nor the PRC is willing to go to war with the other to change the cross-Strait status quo. The United States and China are not "destined for war," and conflict over Taiwan is not inevitable. There is space to preserve peace across the Taiwan Strait.

However, both sides are also in a long-term game of coercive bargaining over Taiwan. In coercive diplomacy, it is rational for both sides to be ambiguous about their intentions, their capabilities, and their bottom lines. If the United States were to clarify its position toward Taiwan—either to explicitly pledge to defend it, or to completely foreswear military support—it would undermine the U.S. bargaining position. Providing a formal guarantee to defend Taiwan would be interpreted in Beijing as permanently closing off any path to unification and would likely trigger the reaction it is intended to prevent. And declaring unequivocally that the United States will not fight China over Taiwan would lead to fatalism and collapse of morale in Taiwan, and to sharply rising pressure from Beijing to negotiate a political takeover. Likewise, if Beijing were to halt its military modernization and swear off the use of force, it would undermine its own bargaining position, opening the way for Taiwan to pursue independence with implicit U.S. backing. Thus, although it makes many observers uncomfortable, some ambiguity is inherent in both Washington's and Beijing's Taiwan policies.[30]

Furthermore, in coercive bargaining, much of the contest is about shaping an adversary's perceptions. To this end, Beijing is trying to influence beliefs in Washington about its Taiwan strategy, just as Washington is trying to influence beliefs in Beijing. The CCP has incentives to overstate the importance and urgency of "national unification," its capabilities, its resolve, and the costs it is willing to bear to achieve control over Taiwan. Washington needs to recognize that it is a target of a long-term effort to erode support in the United States for defending Taiwan. This is how Beijing wins without fighting.

The keys to preserving peace across the Taiwan Strait, then, depend on strengthening U.S. credibility on at least four dimensions. First, the U.S. interest in preventing unilateral changes to the cross-Strait relationship must remain convincing, not only to observers in the PRC, but also to American leaders and to the American people. The robust economic ties between Taiwan and the United States, especially but not only in the strategically important semiconductor industry, are one way in which this interest is made clearer to all.

Second, Beijing needs to be reassured that the United States will not oppose unification if the process is peaceful and voluntary. This reassurance does not require the United States to accept Beijing's claims about Taiwan as Chinese territory, but it does require reinforcing, through both words and deeds, that moves toward Taiwan independence do not align with U.S. interests. High-profile but purely symbolic acts of support, such as visits by high-level U.S. officials, acts of Congress supporting Taiwan independence, and enhanced "transit stops" by Taiwan leaders, undermine U.S. credibility on this dimension. Military training, arms sales, and other forms of security cooperation, by contrast, reinforce the message that cross-Strait changes must be peaceful and that the United States will not allow Taiwan to be coerced into negotiations. It is also long-standing U.S. policy to link these efforts to the cross-Strait security environment; if, in the future, Beijing is willing to engage with the Taiwan government and reduce its own coercive activities, this link should be made explicit by a commensurate reduction in U.S. military activities in the region.

Third, partners and allies need to be reassured that the United States will continue to work together to advance shared economic and security interests. With partners and allies, the defense of Taiwan is a manageable problem;

without them, it becomes impossible. A U.S. partner that is more unpredictable and unreliable is one that encourages other regional powers to consider concessions toward China, especially on the Taiwan issue. More burden-sharing to address the China challenge is good; more hedging from formerly "rock solid" allies is bad. Washington and Taipei are fortunate that leaders in Japan, South Korea, the Philippines, and Australia have all signaled an increasing willingness to risk Beijing's wrath in support of collective defense.

And finally, Taiwan's leaders and the Taiwanese people need to be reassured that Taiwan's fate is still important to the United States. Rhetoric that frames Taiwan as a free-rider on the U.S. security umbrella or as a bargaining chip to be used in U.S.-China relations undermines U.S. credibility in Taiwan and contributes to fatalism there. Conversely, deepening people-to-people ties, educational exchanges, trade and investment, and high-tech cooperation strengthen confidence in Taiwan, contribute to its economic and social vitality, and position it to survive and thrive in the long term.

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