**World Class Podcast**
“What We Need To Talk About When We Talk About Taiwan”
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*This transcript has been edited for clarity.*

**McFaul:** You’re listening to World Class from the Freeman Spogli Institute for International Studies at Stanford University. We bring you in-depth expertise on international affairs from Stanford’s campus, straight to you. I’m your host, Michael McFaul, the director of the Freeman Spogli Institute.

Today, I’m talking with Larry Diamond and Oriana Skylar Mastro about Taiwan and what we need to understand about what’s going on there, what’s happening in the future, and whether we go to war or not. That’s what I know all of our listeners want to know.

Larry is the Mosbacher Senior Fellow in Global Democracy here at FSI, and is recognized around the world as a leading expert on democratic systems. He also leads Hoover Institution’s programs on China’s Global Sharp Power and on Taiwan in the Indo-Pacific region.

Oriana is a Center Fellow at the Freeman Spogli Institute for International Studies, where her research focuses on Chinese military and security policy, Asia-Pacific security issues, and coercive diplomacy. She simultaneously serves in the United States Air Force Reserve as a strategic planner at INDOPACOM.

In August a few months ago, the three of us visited Taiwan with some of our colleagues from the Hoover Institution. We met with fellow academics and leaders in Taipei, including President Tsai Ing-wen, for dialogue about the recent rise in tensions across the Taiwan Strait and the future of Taiwan democracy. Today we want to talk about that.

Oriana, Larry, welcome back to World Class.

**Diamond:** Thank you.

**Mastro:** Yes, thank you.

**McFaul:** Let’s start with the question everybody is worried about: How worried should we be that China, in the coming years or decades, — and I think that’s an important distinction to wrestle with — is likely to invade Taiwan, or not?
**Mastro:** I think we should be extremely worried. There are many different campaigns that the Chinese military plans for when it focuses on Taiwan. This is everything from blockades to missile strikes to a full-on amphibious invasion. I think we can be somewhat confident that in the next five years, there's 100% chance of some sort of use of force.

**McFaul:** 100%?

**Mastro:** Yeah. The question is more about the intensity and the level. More and more, Beijing is using their military as a signaling device. So, every time they're going to be unhappy about something like the post Pelosi visit, the next election in Taiwan, a passing of legislation in the United States, we can see them making military moves that are going to be extremely disruptive to the region and dangerous to Taiwan.

The big question is about an amphibious assault. Are they going to take their ships, submarines, and aircraft and try to put boots on the ground in Taiwan? I think here it's more likely than not in Xi Jinping is next term. This is largely because of the military capability that is coming online. For the first time in the history of the People's Republic of China, they actually can do an assault like this.

**McFaul:** That's pretty scary. What do you think, Larry?

**Diamond:** I just want to clarify this, first of all. I hear you saying that sometime between now — October of 2022, as Xi Jinping is getting his third term — and October 2027, or so, when presumably he will try to get his fourth term, you think it's more likely than not that, essentially, the People's Republic of China will invade Taiwan to try and conquer it?

**Mastro:** Right. And I will say that people who go counters to that viewpoint out that China tends to have a long-term view of things. And that is correct. But we're at the end of that long term. They've had this plan in place and the thoughts about when they can do this since 1949. The military modernization started over 25 years ago. They are long term thinking. It's just at some point, you reached the end of that plan, and that's where we are now.

**Diamond:** So, a couple of thoughts. First, Oriana is the expert on the Chinese military.

**McFaul:** Yeah, we'll get to Taiwan in a minute.

**Diamond:** I have long taken what she says very, very seriously. And so, I think we all should be sobered by that. That's point number one.

Number two, I was struck by the fact that our colleague on leave from CISAC as the Undersecretary of Defense Colin Kahl, when asked a few weeks ago about the probability of a
PRC military assault on Taiwan, said, “We do not think it will happen in the next two years.”
Two years

**McFaul:** Yes, he was very precise about that.

**Diamond:** And Oriana, you would probably not disagree with that.

**Mastro:** Right.

**Diamond:** And so, the window between two years and five years is looking like an extremely scary time. And some people think it might be slipping a bit to 2030 instead of 2027. But whatever it is, the future is fast approaching.

And now this gets into what we heard, what we learned, what we discussed in Taipei. I think there is a clock ticking and we urgently need to change Beijing's calculus by so strengthening Taiwan in terms of its military capacity and readiness, and so convincingly signaling our resolve — and hopefully Japan doing the same, and ideally Australia as well — that the Beijing authorities will judge it’s not worth the risk, and that the risk of failure is too high.

Because just as their capacity and readiness is rapidly enhancing, so ours and Taiwan’s will be as well. And this, I think, now requires some discussion among us here as to what we need to do to strengthen our capacity and readiness and to help Taiwan, and, independent of Western Arms and engagement, what Taiwan needs to do to make itself more resilient and more capable in the face of Chinese military threats.

**McFaul:** Right.

**Mastro:** If I could just say one thing in support of your call, and that is: reasons that are not true about why China wants to take Taiwan. I think this is important for strategy. I agree that if we take effective measures, we can convince China to put this off. But that’s because I don’t see any empirical evidence for two other related arguments. The first being that a window of opportunity is closing for Beijing. That it's now or never. That their power has peaked and after 2027 they’ll no longer have the capability to do this. I don’t see a lot of empirical support for this, and more importantly, I don’t see any discussion of that in China. They don’t see their rise as over. So, I think we could push this farther back.

**McFaul:** But not forever, right?

**Mastro:** Not forever.

**McFaul:** But we have some way to push it. We’ll get to what those moves might be in a minute. Go ahead.
**Mastro:** Some people say that Xi Jinping needs Taiwan to stay in power. I think he wants Taiwan. But I think he could stay in power fifteen more years and not get it. It really is about this cost-benefit calculus. The problem is that recently the balance of power shifted in China’s favor militarily. They have an expectation, rightfully so, that economic costs, while they exist, would be limited and acceptable. And so, we have an opportunity to change that thinking, and therefore I think we have an opportunity to push this down the line.

**McFaul:** So let’s ask three questions in a row. First, let’s focus on the Taiwan part and what you both are talking about. And maybe start more generally with what was most striking to you from the trip this time around. What did you learn that you didn’t know before?

**Diamond:** One thing that I learned is that they’re starting the get a lot more serious about the urgency of the situation they face, and the need for them to strengthen their capacity and readiness. I think that Taiwan has been sobered by a series of really serious geopolitical body blows in recent years: the ending of Hong Kong’s autonomy and the “one country, two systems” model with the brutal suppression of Hong Kong’s semi-autonomous system; the rising military incursions into Taiwan’s air defense identification zone and coastal waters, and the whole rising pace of Chinese military intimidation. It’s constant, relentless, and dangerous.

The war in Ukraine, I think, this had a very big impact on Taiwanese public opinion. We had a presentation about that at Hoover just yesterday. It’s had a visible impact on Taiwanese public opinion.

And finally, they saw in the military temper tantrum after the Pelosi visit the reality of Chinese military capacity and aggressiveness. So, what has changed that I think struck me is number one, is that there’s now a very significant public support for restoring serious, or at least semiserious, mandatory military service from right now four months of what's described as summer camp to one year of really serious weapons training. Personally, I think it should be at least two years, and maybe even as an Israel, three years. But at least that's a start. And I've been stunned to see the level of public support for this and mixtures and opinion surveys.

Number two: We learned that Taiwan defense spending is continuing to rise. It was well below 2% of GDP. It's now at 2.1%, and it's set to rise further.

And number three: While there's not consensus in Taiwan in favor of what's called the porcupine strategy of putting much more emphasis in their weapons acquisitions and military strategy on a distributed defense — lots of small lethal mobile weapons, or what’s called in Taiwan the “overall defense concept,” developed by Admiral Lee Hsi-min. Professional and military assessment is moving in that direction, which is the direction that American defense planners would like to see them move in.
I think these are all important changes in Taiwan's mentality and readiness. But they still want to see — and this is the last point I'll make - which we heard from a very high level in the Taiwan government, more demonstrations of American commitment. Their message to us is, “If we see that commitment in one way or another, it's going to reinforce Taiwan's will to fight.”

**McFaul:** How about you, Oriana? What was surprising, what was not? I'm curious how it felt to you.

**Mastro:** I agree with Larry. I have been on a number of these trips, and I was surprised how seriously they are taking the threat for the first time. But I want to be clear about what the “they” is. “They” is the political elites that we spoke to. A lot of those people, cabinet-level people, did suggest they that they too felt like the timeline was more like 2025-2027.

But we also heard from some experts of polling of the people of Taiwan, that the vast majority of them still feel like an attack or an invasion by China is unlikely. And people at the highest levels did voiced concerns about the willingness of the people of Taiwan to fight. The military is 180,000 people right now. It was conveyed to us that there's confidence that those military members would fight, and ideally, they would have the necessary weapons to do so. They're also switching to more urban warfare training, which are all positive developments.

But I continue to be concerned about the overall population. When polled, they did say they would fight, but we were also told there's a bit of a social desirability aspect. No one says, “No, I won't.” But when you look at how many people volunteer for the military, it's minimal.

And in some of our conversations, especially with individuals in the semiconductor industry — I don't know if you remember this exchange —I asked them, “Do you think the United States should put together a noncombatant evacuation operation to get you off this island if China invades?” And the response that we got was something sort of like, “Well, I go to China a lot, and it's not too bad.”

I have concerns about China's ability to co-opt elites in certain sectors and at certain levels more easily than we might think. The number one predictor of whether or not people fight tends to be whether or not they feel trained. So, I think what they're doing with the military is absolutely the right direction. But for a porcupine strategy, I'm hoping they then move to think more about the rest of the population for more that kind of civil defense training that we might see in the Baltic states, for example.

**Diamond:** I would summarize it in this way: they're moving in the right direction, but there's a clock ticking. And we don't know how fast it's ticking. But they need to move faster than they're moving.
McFaul: Pick up on this point about co-option of elites, Larry. I mean, you've been going to Taiwan for decades. You lived there for a year. You’ve written about Taiwan. You’re about to go back to Taiwan, if I’m not mistaken, in a few days. Tell us about the evolution of that, particularly with the KMT the party that's considered closer to the People's Republic. How do you see that piece evolving?

Diamond: I’m not going to describe the KMT as a stalking horse for China. Like all political parties, it’s got a certain range of views. The candidate is offered in the last election that was as accommodationist toward Beijing, has any presidential candidate the KMT has had since democracy dawned on Taiwan. But he not only lost, he was crushed. And I think the KMT drew an important lesson from that and will nominate a candidate more in the mainstream of Taiwan public opinion for the January 2024 presidential election.

There are Chinese interests in Taiwan. They control a certain wing of the Chinese language media in Taiwan. And there are certain actors who are favorable toward Beijing. People draw their own conclusions about how deep that relationship goes.

I think the more important question in Taiwan now is not about penetration of Chinese interests in Taiwan. I think there’s a lot of alertness to that.

McFaul: And that’s grown over time, you’d say?

Diamond: Yes. And I think that Chinese propaganda and disinformation efforts in Taiwan through media that are favorable to them, and through other means, have not been shown to be terribly effective so far.

The other side of this coin is that in the runup to the January 2024 presidential election, the Democratic Progressive Party (DPP) will also have to make its choice of a presidential nominee. President Tsai Ing-wen would like to see the party choose someone like her, who has been fairly restrained and responsible and careful in her language and avoiding the appearance of provocation with Beijing.

McFaul: Explain to our listeners what “provocation” means.

Diamond: Provocation is anything that suggested Taiwan is moving toward independence.

Mastro: Calls for referendums that have happened in the past, or even hinting that they might hold a referendum to ask the Taiwan people what they think about independence.

Diamond: Anything that might change the name of “Taiwan,” or change the name of its representative offices abroad or substantially change the symbols and references to the historical past. The wise thing to do, in my view, is just to preserve the status quo, which
substantial majority of public opinion in Taiwan favors. There's a variation of opinion within the DPP about this as well, so we'll see what happens. But Taiwan will be safer if on the one hand, it strengthens itself in terms of its ability to defend, resist, and deter, and on the other hand, it avoids any appearance of moving toward permanent independence.

**McFaul:** Right. So, final question. We've touched on it a bit, but let's take one more cut at it and one more bite at the apple. We heard in Taiwan that they would like the United States to do more. Spell out what you think “do more” is. Oriana, maybe we start with you with the military piece, but then let's broaden it. I'm interested in what other countries should be doing in order to avoid war or, if that can't happen, at least kick the can down the road.

**Mastro:** So, the bottom line in the military space is right now we're in a situation in which China could move quickly and take Taiwan successfully before the United States could mount a significant difference. This is the main issue. If you look anywhere beyond the Strait, and you thought, “Is the United States and China going to fight a war there?”, the United States wins every time. If you thought about certain scenarios in which it's a more protracted conflict where the United States has time, we still win every time. That's why I think it's unlikely that they start with a blockade and then move to an invasion, because a blockade gives the United States exactly the time it needs to move into place.

**McFaul:** So, more time is to our benefit.

**Mastro:** Right. For the most part, our Pacific forces are not in Asia. A lot of them are in Hawaii, or here in California. When we look at the map, basically we see that the distance between China and Taiwan is like from D.C. to Richmond, Virginia. They can get there very quickly. And one of the lessons they've learned from Ukraine — well, it's not really what they learned, because they knew it already. But it’s been a reminder that, you definitely have to move hard and fast and resolve this before anyone else can get involved.

So, the United States needs a military capability — forward deployed military capability — to be able to stop them and to stall them. And one of the main ideas along these lines are intermediate range ballistic missiles. Ideally, we would have more bases in places to put stuff, but this requires a lot of legwork in terms of diplomatic access before we can open up some of those bases.

In addition to having a greater military detour, we could also go the route of convincing countries to come on board to promise and coordinate in peacetime about what would be significant economic sanctions, like stopping all trade with China if there were an attack.

The problem is, I think most listeners might not realize how far we are from those eventualities. Our allies and partners are extremely reluctant, not because they don't take this threat seriously, but precisely because they do. They want to save their own military
forces for a potential conflict that they have to face with China in the future. And economically, they're so reliant on China. I've heard representatives from the Japanese finance ministry say that they're not going to sanction China significantly if this happens. So, it does require a lot of work on our part. But the bottom line is, if Japan fought with the United States, for example, we would win and that would be enough to deter Beijing. If it looked like countries in the region were going to cease trading indefinitely, that would deter Beijing. But it does take a lot of work that the United States isn't putting in yet.

McFaul: At this moment

Mastro: At this moment.

McFaul: Larry?

Diamond: I will make the following points. First of all, you more than anyone on the Stanford campus, Mike, remember the phrase and the import of President Zelenskyy saying shortly after the invasion, “I don't need a ride. I need weapons.” And I would say right now Taiwan, more than words, needs weapons. And we are suffering enormous delays in the production of the kinds of weapons that Taiwan needs and in the delivery of what they've already bought and what we have promised them. We have to find ways of fixing our military procurement and production system and dramatically narrow the timeline between decision and delivery.

McFaul: Right.

Mastro: For ourselves as well!

Diamond: Absolutely! And for other global contingencies.

McFaul: That's a great point. That's a very clear point we heard in Taiwan. I was very struck by that.

Diamond: Therefore, I believe that we should license the production of some of these weapons systems to Taiwan to be produced in Taiwan and stockpiled there.

Secondly, we need to work with the government and people of Taiwan to help them stockpile certain essential supplies of food, energy and so on, so that if war happens, they can hold out for a time until we can get there.

Third, we need to push them on reorganizing their military and ramping up their readiness: full civilian mobilization to make it less appetizing for Beijing to act and less likely that Beijing will prevail and to buy time.
Finally — and I can't stress this enough — my agreement with what Oriana said about Japan and the increasing conviction I have that the critical maybe the most critical variable in this is which way Japan is going to go. I think a huge amount of American public and private diplomacy now and social and intellectual and political engagement with Japan should be focused on persuading Japanese society, as well as Japanese government, that this is existential for them. If Taiwan is conquered, it's over for Japan, too. Japan is going to become a wholly owned subsidiary of an East Asia, and maybe an entire Indo Pacific region, that is dominated by the communist People's Republic of China. And I think Japan needs to ask itself if that is the kind of region and the kind of world that wants to live in?

**McFaul:** Do you agree?

**Mastro:** Absolutely. Whenever I give these talks, there are people who are like, “Oh my gosh, everything is so dire; war is happening in the next five years.” There are things that can completely change Beijing’s calculus, but it takes a lot of work, and I just don't see us doing the work yet. That's why there's a sense of urgency in the talks I give and in the writings that I put out there to say we don't have that much time. And it takes a long time, for example, to change the minds of the people of Japan and to get them to change their constitution so that they can act in defense of another entity. The administration would say they've made significant progress because they convinced Japan to say the word “Taiwan” in a statement, and it’s not that I disagree with that. It’s just we have to move much more quickly.

**McFaul:** Well, I think you've given us a great topic for a future discussion about Japan. And tragically, I don't think this issue is going away anytime soon. I hope we can get you guys to come back. Thanks, Oriana, thanks, Larry.

**Diamond:** Thank you, Mike.

**McFaul:** You’ve been listening to World Class from the Freeman Institute for International Studies at Stanford University. If you like what you’re hearing, please leave a review and be sure to subscribe on Apple and Simplecast to stay up to date on what’s happening in the world, and why.