

Innovating Strategic Ambiguity

Empowering Taiwan's Defense amid a Persistent Threat from China

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Abstract

This article explores the imperative for Taiwan to proactively adapt its island defense strategy to effectively counter the aggressive actions of the Chinese Communist Party (CCP) and maintain a strong deterrent capability. Urgent implementation of asymmetric approaches is advocated, positioning Taiwan as a resilient “porcupine” in the face of mounting threats. Delaying such measures only escalates the risk of decisive CCP intervention. The study highlights the integral role of Taiwan’s Overall Defense Concept (ODC) in advancing whole-of-society strategies, while emphasizing the need for policy adjustments and a heightened focus on strategic ambiguity in coordination with the United States, to optimize the deterrence value of the ODC. By fostering third-party training innovations, prioritizing defense capabilities to deter People’s Liberation Army (PLA) actions, and bolstering Taiwan’s confidence in protracted engagements, both Taiwan and the United States can effectively address the gaps in Taiwan’s defense posture. Successful implementation of the ODC and the whole-of-society approach will contribute to upholding the existing status quo and safeguarding US security interests.

The United States employs a policy of strategic ambiguity when addressing the Taiwan issue, which is rooted in the Shanghai Communiqué and the “US concession not to support either a ‘one China, one Taiwan’ or ‘two Chinas’ framework.”¹ This approach was further refined with the Taiwan Relations Act (TRA). The TRA codified US military support and any potential military response into US law, requiring the president “inform the Congress promptly of threats to the security or the social or economic system of the people on Taiwan,” and the “President and the Congress shall determine the appropriate action in response,” leaving any potential US response unknown.² The United States supports the status quo between China and Taiwan through strategic ambiguity, while attempting to deter the increasingly aggressive and invasion-capable People’s

¹ Adam P. Liff and Dalton Lin, “The ‘One China’ Framework at 50 (1972–2022): The Myth of ‘Consensus’ and its Evolving Policy Significance,” *China Quarterly* 252 (2022), 984, <https://www.cambridge.org/>.

² House, “H.R., 2479–Taiwan Relations Act. 24 1979.” 96th Congress, Congress.gov, 10 April 1979, <https://www.congress.gov/>.

Liberation Army (PLA). Taiwan's President Tsai Ing-wen stated in 2016, "We will not succumb to pressure from China. . . . Taiwan is a sovereign, independent country."³ Her statement highlights the complex dynamics in cross-strait relations, where Taiwan perceives itself as distinct from mainland China while the Chinese Communist Party (CCP) views its existence as a threat. As the PLA's military capabilities continue to grow, there is a pressing need to reassess Taiwan's defensive strategy to effectively deter China. A key recommendation is to invest in asymmetrical warfare capabilities, training, and a comprehensive whole-of-society approach as outlined in Taiwan's 2017 Overall Defense Concept (ODC) to disrupt PLA calculations.⁴ However, the current Taiwanese policy and US strategic ambiguity pose challenges to maximizing the deterrence value of the ODC, thus impacting US security interests. This article will delve into the background of the ODC, explore the cultural dimensions related to its implementation, assess the implications for US security interests, and propose lines of effort to preserve the status quo within the Taiwan Straits.

Background

Taiwan's ODC outlines strategies to counter the military advantages of the CCP through innovation and asymmetry, although it leaves certain aspects, such as guerilla-type territorial defense forces and urban warfare, undetermined. In his treatment of the invasion threat to Taiwan, Ian Easton divides the operationalization of the ODC into three distinct phases. The first phase, "Mobilization and Force Preservation," involves Taiwan reacting to a surprise PLA attack by activating reserves, declaring martial law, and emplacing defenses. Simultaneously, military forces dig in and disperse to survive an initial assault. The second phase, "Joint Interdiction," sees the military reemerge to decisively defeat PLA forces in the littoral zones and at the landing beaches, employing sea mines and missiles.⁵ The final phase, "Homeland Defense," envisions a protracted urban war of attrition, where Taiwanese forces and citizen soldiers engage in demolishing "bridges, tunnels, supply depots, fuel stores, airport tarmac and anything else that might be of aid"⁶ and impeding the PLA. Estimates suggest that Taiwanese forces could hold

³ Quoted in Charles Hutzler, "China Can't Make Taiwan 'Bow to Pressure,' Island's Leader Says," *Wall Street Journal*, 4 October 2016, <https://www.wsj.com/>.

⁴ Drew Thompson, "Winning the Fight Taiwan Cannot Afford to Lose," in *Crossing the Strait: China's Military Prepares for War with Taiwan*, ed. Joel Wuthnow et al. (Washington DC: National Defense University, 2022), 337.

⁵ Thompson, "Winning the Fight Taiwan Cannot Afford to Lose," 327

⁶ Ian Easton, *The Chinese Invasion Threat* (Manchester: Eastbridge Books, 2019), 180–209.

out unassisted for at least 30 days,⁷ while the uncertain US response to Chinese aggression looms. While these three phases propose a robust strategy to deter a Chinese invasion, the implementation of the ODC fails to fully harness the will to fight within Taiwan.

One of the challenges in implementing an asymmetric strategy lies in Taiwan's focus on high-end conventional forces, which potentially indicates an underestimation of the national will to fight on the island. In August 2022, President Tsai announced a 14-percent increase in Taiwan's defense budget to more than USD 19 billion.⁸ However, Taiwan's emphasis on acquiring conventional systems and upholding previous contracts for US equipment aligns more closely with a traditional defense in depth approach, even if such systems are less survivable than dispersed asymmetric capabilities.⁹ As Jimmy Quinn observes, "Taiwan's defense establishment is in the throes of a debate about how to balance the imperative of buying legacy weapons systems—jets, warships, and tanks—with that of turning the island into a 'porcupine,' bristling with missiles and militias, to prevent the People's Liberation Army from seizing the country and to wage an asymmetric guerrilla campaign against it if it does."¹⁰ The ongoing debate over the asymmetric approach and the challenges in implementing it highlight the potential bias toward an overly optimistic strategy of defeating the People's Republic of China (PRC) in the strait, while potentially underestimating the value that a motivated populace brings during the "Homeland Defense" phase.

Taiwan's decision to transition to an all-volunteer military force and end mass conscription further undermines the deterrence value of the ODC. Until 2009–2011, under the Ma Ying-jeou administration, Taiwan maintained a credible strategic reservist force that required mandatory two-year terms of conscripted military service.¹¹ However, since 2013, draftees are only required to do four months of military training, while the military shifted toward a fully volunteer force. The implementation of an all-volunteer force has proved to be myopic, given the escalating tensions across the strait, and has diminished the ability to credibly execute the "Homeland Defense" phase. In 2022, Taiwan extended mandatory military service to one year to support an asymmetric defense of the island. President Tsai emphasized, "As long as Taiwan is strong enough, it will be the home of democracy

⁷ Easton, *The Chinese Invasion Threat*, 210.

⁸ Jimmy Quinn, "Taiwan Needs Quills," *National Review* 74, no. 20 (2022), 3.

⁹ Thompson, "Winning the Fight Taiwan Cannot Afford to Lose," 332

¹⁰ Quinn, "Taiwan Needs Quills," 2.

¹¹ Thompson, "Winning the Fight Taiwan Cannot Afford to Lose," 335

and freedom all over the world, and it will not become a battlefield,”¹² highlighting the increased role of asymmetry in deterring the CCP. Nevertheless, Taiwan must overcome institutional inertia toward legacy weapon systems and effectively integrate the Taiwanese people into the ODC.

An invasion that progresses into the “Homeland Defense” phase would require significant resolve and hope for long-term success, which hinges on the culture and social dimensions of the Taiwanese people. As Clausewitz aptly describes, a nation under siege is “like a drowning man who will clutch instinctively at a straw, it is the natural law of the moral world that a nation that finds itself on the brink of an abyss will try to save itself by any means.”¹³ This understanding compels policy makers to grapple with the difficult choices surrounding a potential invasion of Taiwan.

One of the recommended means in the ODC is the formation of a territorial force consisting of reservists who are “trained for localized operations with decentralized command, as the nature of warfare will be urban and guerrilla.” US government officials directly reiterated this suggestion to President Tsai in 2020.¹⁴

Support for the territorial force proposal is evident in a survey conducted by the Taiwan International Strategic Study Society (TISS) in March 2022. The survey revealed a 30-percent increase, with 70.2 percent of Taiwanese respondents expressing willingness to defend Taiwan if China took military action following the February 2022 Russian invasion of Ukraine. Additionally, the same survey indicated an increased willingness among respondents to extend mandatory military service and undergo a two-week reservist training program to enhance military readiness.¹⁵

Similar sentiments were reflected in the Taiwan National Security Studies Survey (TNSS), which was conducted in December 2022 among adults over 20 years old. The TNSS survey found that 65.8 percent of respondents believed that a majority of Taiwanese people would likely or definitely join the war effort in the event of a Chinese invasion.¹⁶ These findings from the TISS and TNSS

¹² Yimou Lee and Ann Wang, “Taiwan to extend conscription to one year, citing rising China threat,” *Reuters*, 27 December 2022, <https://www.reuters.com/>.

¹³ Carl von Clausewitz, *On War*, ed. Micheal Howard and Peter Paret (Princeton, New Jersey: Princeton University Press, 1976), 64.

¹⁴ Thompson, “Winning the Fight Taiwan Cannot Afford to Lose,” 335

¹⁵ Keoni Everington, “30% more Taiwanese willing to fight for country after Russian invasion of Ukraine,” *Taiwan News*, 17 March 2022, <https://www.taiwannews.com.tw/>.

¹⁶ Institute of Political Science at Academia Sinica, “Taiwan National Security Survey,” Taiwan National Security Studies, Duke University, trans. Google Translate. 2022, 24, <https://sites.duke.edu/>.

surveys suggest that there is substantial support among Taiwanese citizens for defending their homeland.

The Taiwanese people increasingly view themselves as independent and separate from mainland China, which poses challenges of peaceful reunification. According to a 2020 survey by the Pew Research Center, “In Taiwan, most people have negative views about mainland China. Just 35% of adults give positive marks to mainland China, while about six-in-ten hold unfavorable views.”¹⁷ Furthermore, only 27.5 percent of Taiwanese respondents identify as Chinese and Taiwanese, 67 percent identify solely as Taiwanese, and less than 6 percent of the population seeks unification with mainland China.¹⁸ These statistics illustrate Taiwan’s distinct identity and the potential for its citizens to resist by any means to preserve their nation.

A 2022 study titled “National Identity, Willingness to Fight and Collective Action” examined how individuals’ identification as solely as Taiwanese or having a dual identity (Chinese and Taiwanese) influences their resolve and willingness to fight in a China–Taiwan war, based on their perception of others’ willingness to fight through collective action. The data revealed that individuals with an exclusive Taiwanese identity were twice as likely to engage in a China–Taiwan war, and the willingness of “fence-sitters” increased when they believed that “the majority of Taiwanese people will resist.”¹⁹ This study demonstrates that Taiwan’s identity is distinct from mainland China and suggests an increased potential for citizens to resist and protect their nation.

While recent data indicates that the Taiwanese people may be willing to fight against an invasion, there are doubts about the willingness of the United States to intervene on their behalf, which weakens Taiwanese resolve. Strategic ambiguity leaves the Taiwanese people hostage to CCP coercion and uncertain of US support. At the same time, “effective hostage-taking requires guarantees that the hostage survives if the demands are met.”²⁰ As Thomas Christensen argues, “successful deterrence requires both threat and assurance.”²¹ Therefore, the Taiwanese people, as the hostage in this context, require assurances of their survival to effectively deter

¹⁷ Kat Devlin and Christine Huang, “In Taiwan, Views of Mainland China Mostly Negative,” *Pew Research Center*, 12 May 2020, <https://www.pewresearch.org/>.

¹⁸ Chen Yu-Jie, “‘One China’ Contention in China–Taiwan Relations: Law, Politics and Identity,” *China Quarterly* 252 (2022): 1025–44, doi:10.1017/S0305741022001333.

¹⁹ Austin Horng-En Wang and Nadia Eldemerdash, “National identity, willingness to fight, and collective action,” *Journal of Peace Research*, 7 December 2022, <https://doi.org/>.

²⁰ Thomas J. Christensen, “The Contemporary Security Dilemma: Deterring a Taiwan Conflict,” *Washington Quarterly* 25, no. 4 (Autumn 2002), 10.

²¹ Christensen, “The Contemporary Security Dilemma,” 7.

China. In 2020 55.1 percent of Taiwanese people believed that the United States would intervene on Taiwan's behalf, but that number dropped to 42.7 percent in 2022. Furthermore, almost half, 47.3 percent, considered that the United States would not participate at all when viewed through the lens of the Ukraine situation. Most significantly, only 34.7 percent in the TISSS survey and 26.9 percent in the TNSS survey believe Taiwan can stand against China without US support.²² Recognizing that approximately a third of Taiwanese people believe they could defend Taiwan without US aid highlights a fundamental flaw in strategic ambiguity. In the absence of stronger assurance and hope from the United States, the Taiwanese people could find themselves confronted with a difficult choice. On one hand, they may face the prospect of a devastating war of attrition with limited chances of success. On the other hand, they might consider a less painful but also less free reunification with the mainland. Maintaining the status quo in the Taiwan Strait aligns with the interests of the United States. However, the strategy of strategic ambiguity, while urging Taiwan to prioritize deterrence, also undermines the certainty of US assistance in the event of a conflict.

Implications

Outlined below are three essential areas for potential U.S. strategic endeavors within the Taiwan Strait, which offer both security implications and opportunities.

Equipping

The Taiwanese military and political leaders understand the role of asymmetric strategies. However, they face resistance to change that the United States must help overcome by equipping credible defensive deterrents throughout all three phases of Taiwan's defense. Within the military dimension, Taiwan must fully embrace, equip for, and train for a comprehensive whole-of-society approach as outlined in the ODC. To facilitate this, the United States must invigorate the necessary processes and industrial support to meet these goals. Taiwan should prioritize acquiring asymmetric defense capabilities rather than focusing solely on procuring traditional legacy systems, "turning the island into a 'porcupine,' bristling with missiles and militias."²³ Through the TRA, the "United States will make available to Taiwan such defense articles and defense services in such quantity as may be necessary to enable Taiwan to maintain a sufficient self-defense ca-

²² Everington, "30% more Taiwanese willing to fight"; and Institute of Political Science at Academia Sinica, "Taiwan National Security Survey," 19.

²³ Quinn, "Taiwan Needs Quills," 2.

pabilities.”²⁴ By leveraging the TRA and collaborating with partner nations, the United States should prioritize the shift toward asymmetric warfare, emphasizing more survivable and dispersed systems. It is essential for the United States to develop lines of effort that align industrial capacity, partner capabilities, and budget constraints within Taiwan while swaying US public opinion to recognize the value of investing in deterrence rather than risking conflict in the Taiwan Straits.

Whole-of-Society Approach

The establishment of a territorial force of reservists is an increasingly important priority in Taiwan, and it requires a revitalization of a more martial culture supported by US policy. The willingness of the Taiwanese people to fight, as evidenced by surveys and the growing requirements for mandatory military service, indicates a positive cultural shift that supports the development of a territorial defense force. To ensure the effectiveness of this force as a credible deterrent, Taiwan must enhance its training capacity and resource allocation. The United States, leveraging its network of allies and partners, is well-positioned to facilitate training opportunities and provide training spaces in partner nations, thereby enhancing Taiwan’s asymmetric capabilities while minimizing tensions with the CCP. To achieve its security objectives, the United States could encourage various regional partners like Singapore, South Korea, or Japan to train Taiwanese reservists in high-payoff defensive and disaster relief tasks, addressing gaps in Taiwan’s defensive capabilities. If implemented effectively, off-island training would enhance efficiency, rapidly bolster deterrent capacity, and strengthen positive regional relationships, thereby complicating the calculations of the PLA.

Strategic Assurance

To ensure credible deterrence, the United States must balance between China’s interests and the need to provide legitimate assurances of Taiwan’s ability to withstand a Chinese invasion. The United States should evaluate its strategic ambiguity policy and utilize the TRA to equip and train Taiwan in a manner consistent with US interests, fostering the determination and capability of the Taiwanese people to resist. The fact that only a third of Taiwan’s population believes they could defeat China without US assistance suggests that there may be a threshold of violence or threat level at which the Taiwanese population might consider submitting to the CCP.

²⁴ H.R. 2479, Taiwan Relations Act.

Given the constraints of strategic ambiguity, the most realistic option for the United States to reassure Taiwan and maintain its resolve to fight is to provide sufficient capacity for Taiwan to defend itself and win—or at the very least, avoid defeat. A strong and confident Taiwan aligns with US interests in effectively deterring Chinese actions. US policy should prioritize comprehensive armament, training, and support of the whole-of-society approach until the military and cultural changes outlined by the ODC become deeply ingrained within the Taiwanese people.

Conclusion

Taiwan stands at a critical juncture, confronted by the aggressive power of an assertive CCP. It is imperative for Taiwan to undertake a strategic redesign of its island defense to effectively respond to this challenge. Delaying the implementation of asymmetric approaches and failing to transform into a metaphorical porcupine only heightens the risk of decisive action by the CCP.

The asymmetrical strategies outlined in the ODC provide a foundation for the whole-of-society concept, but they necessitate policy changes within Taiwan and updates to US strategic ambiguity to fully leverage the deterrence value of the ODC. By embracing these strategies and making necessary adjustments, Taiwan and the United States can bridge the gaps in Taiwan's defense capabilities, prioritize equipping to mitigate Chinese military superiority, and instill greater confidence in Taiwan's ability to defend itself.

A key aspect of this effort lies in innovating third-party training programs, wherein regional partners can play a crucial role in enhancing Taiwan's defensive readiness through high-value defensive and disaster relief tasks. By successfully implementing these initiatives with robust US support, the ODC and the whole-of-society approach can contribute to maintaining the status quo in the Taiwan Strait and safeguarding US security interests.

It is essential for Taiwan and the United States to work together closely, continually reassessing and adapting their defense strategies to effectively deter Chinese aggression. By doing so, they can uphold stability in the region, ensure the security of Taiwan, and protect shared democratic values. The challenges ahead are formidable, but with strategic vision and collaborative efforts, Taiwan can confidently navigate this complex landscape and safeguard its future. ★

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