FEATURE

Xi Jinping's Taiwan Dashboard

Considering Xi's Calculus for a Possible Move on Taiwan

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Abstract

Xi Jinping's calculus on Taiwan is not guided by mere opportunism but by a structured assessment of strategic, political, and military realities—his metaphorical "dashboard." This article dissects 13 key indicators shaping Beijing's decision on whether and when to invade Taiwan, alongside four enduring factors reinforcing China's long-term objective to acquire Taiwan. The analysis finds that 11 of the 13 indicators favor near-term action, suggesting a closing window of opportunity that could drive Xi toward a military solution sooner rather than later. While China's military readiness remains a consideration, the dynamics of US commitments, Taiwan's shifting identity, and China's economic and demographic pressures weigh heavily on the timeline. Coupled with Xi's personal ambitions and his directive to the PLA to be ready for action by 2027, the balance tilts toward military escalation. Ignoring these hard truths invites peril; understanding them is imperative for policymakers navigating what may be the most volatile flashpoint in US foreign policy in the coming few years.

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What is Xi Jinping thinking about Taiwan? Is he seriously considering the use of force to, as he sees it, reunite Taiwan with the "motherland"? If so, is an invasion imminent? Would the People's Liberation Army's (PLA) military readiness be the decisive factor in Xi's calculus? Or are other variables shaping his decision-making on a possible attack? These are the questions this article seeks to address.[1]

The broader context—the reasons China might consider invading Taiwan—has been analyzed extensively and will not be reexamined in detail here. Suffice it to say, most analysts agree that bringing Taiwan under Beijing's control remains one of the Chinese Communist Party's (CCP) core objectives, an unshaken priority from Mao to Xi. This is not a matter of serious debate. What is debated, however, are the conditions under which China's leadership might abandon their current strategy and resort to force. It is worth noting the relative emphasis, however—past CCP leaders,

[1] This article is based on a presentation with the same title given on 7 December 2023, at the US Air Force Academy (Colorado Springs, Colorado), under the auspices of the Institute for Future Conflict at the USAFA.

from Deng to Jiang to Hu, were prepared to wait. Xi, by contrast, has dramatically intensified pressure, signaling a sense of urgency unseen in previous decades.

This article introduces the idea that Xi Jinping operates with a "dashboard" of indicators as he weighs his options regarding Taiwan. Naturally, Xi does not have a literal dashboard. The term is used metaphorically to illustrate how he assesses key metrics before making a decision.

A dashboard, in its traditional sense, is a cluster of gauges on a car or airplane that informs the operator about speed, direction, altitude (in aircraft), and other critical system functions. More broadly, the term has come to signify a collection of indicators that provide real-time data on essential conditions. Xi's decision-making process regarding Taiwan can be viewed through a similar lens—one in which a range of geopolitical, military, economic, and internal stability factors serve as his key dials and readouts.

Framing Xi Jinping's decision-making through the dashboard metaphor, what indicators dominate his Taiwan dashboard today? Put differently, what key factors shape his calculus on when to shift from the current phase of multiple daily PLA Air Force and/or Navy incursions to full-scale military action? The argument here is that while military readiness remains a crucial variable, it is far from the only one. Xi must navigate a complex matrix of strategic, political, and economic factors—13 key variables in total—alongside four additional considerations that weigh heavily on his timeline. Each of these will be examined below.

A close analysis of these 13 variables—Xi's dashboard dials—and the impact of four supplementary factors suggests that an invasion of Taiwan is likely within the next one to three years. The reasoning is stark: for 11 of these 13 key indicators, delaying beyond that window would leave Xi and China in a weaker position rather than a stronger one. In short, 11 of 13 dials on Xi's dashboard flash warnings that time is not on his side. They signal closing windows of opportunity and reinforce the logic of striking sooner rather than later. Table 1 outlines these 13 indicators, followed by a detailed discussion and an examination of the four additional pressures accelerating Xi's timeline.

A Deeper Look at the 13 Indicators on Xi's Dashboard

Let us examine the 13 indicators. The first two indicate an opening window of opportunity, marked with the "<" symbol, meaning that time works in China's favor—waiting benefits Beijing. The remaining 11 represent a closing window of opportunity, denoted by the ">" symbol, signaling that the present is more favorable than the future. For these factors, delay brings diminishing returns, making the situation progressively less advantageous for Xi Jinping. Each will be analyzed in turn. Table 1 provides an overview of the 13 indicators presented in this study.

Table 1. The dials. The dials on Xi's Taiwan dashboard should include the following opening and closing windows of opportunity (" + > " meaning a closing window, an inducement to go because the longer one waits, the less advantageous it will be for Xi, so sooner is better; and " - < " denoting a reason not to go soon and/or the longer one waits the more advantageous it will be for Xi), so here later is better:

Indicator	Symbol	Implication
Opening Window of Opportunity (Later Is Better)		
PLA preparedness	- <	Waiting improves China's military readiness.
China's struggling economy	- <	Economic difficulties discourage near-term aggression.
Closing Window of Opportunity (Sooner Is Better)		
Taiwan's identity drifting further from Mainland	+ >	Delaying increases risk of losing Taiwan's cultural and political ties.
China's demographic decline	+ >	Fewer fighting-age individuals over time increases difficulty of military recruitment.
Importance of Taiwan's semiconductor industry	+ >	Seizure of Taiwan's semiconductor dominance now benefits China more than later.
Growing importance of semiconductors to China	+ >	China's current lack of access makes Taiwan's semiconductor sector even more valuable.
Growing US commitment to Taiwan	+ >	Trend means delaying allows the US to deepen its support for Taiwan.
US commitment to Taiwan still lacks joint exercises and interoperability	+ >	Present advantage diminishes as US-Taiwan coordination improves.
China's advantage in ship-killer hypersonic weapons	+ >	Current US vulnerabilities make the present a more favorable time for action.
US working to develop hypersonic weapons and defenses	+ >	Delay allows the US to close offensive and defensive technological gaps.
State of US-China relations is now poor	+ >	With relations at a low, Xi faces fewer diplomatic consequences now.
Xi's perception of US intentions as increasingly hostile	+ >	Belief that greater US hostility increases US support for Taiwan, so China must act sooner.
Taiwan's 2024 election, DPP victory	+ >	Pro-independence DPP government accelerates Taiwan's drift from Beijing.

Indicator 1: PLA preparedness (more time to prepare means better chance of success, more tools, etc.)

From a military preparedness standpoint, time is almost always an asset. It enables the development and acquisition of critical capabilities, extends training for personnel, and ultimately increases the probability of success. The People's Liberation Army (PLA) has embarked on an unprecedented modernization campaign, rapidly expanding its arsenal.[2] It has bolstered its fleet of warships, landing craft, helicopters,

[2] US Department of Defense, "Military and Security Developments Involving the People's Republic of China, 2024," *Annual Report to Congress* (14 December 2024), https://media.defense.gov/.

missiles, and unmanned systems while integrating lessons from twenty-first–century conflicts, particularly those unfolding in Ukraine and Russia.

Yet despite this buildup, the consensus—both among Chinese analysts (based on open-source material) and Western military observers—is that the PLA remains unprepared for a full-scale invasion of Taiwan.[3] While nationalist sentiment in China favors the use of force to bring Taiwan under Beijing's control, military experts contend that the PLA still lacks the capability to seize and hold the island.[4] The argument here is straightforward: Xi needs more time to maximize his chances of success. The longer he waits, the stronger his forces will become. However, as discussed in factor #2 in the "Other Factors" section below, delay presents its own risks.

Indicator 2: China's economy is struggling (lends itself to caution in regard to military moves)

Another argument for delaying an invasion lies in China's increasingly troubled economy. Officially, Beijing reported 5.2 percent growth in 2023, according to the *National Bureau of Statistics of China* [5]. Independent assessments, however, suggest the real figure is closer to half that.[6] A leading Chinese economist—recently censured after speaking at a Washington economic forum—publicly challenged the government's numbers. Meanwhile, China's housing market continues its decline, with new home sales plunging 28 percent from January to April 2024.[7] China's youth Unemployment presents another red flag. Youth unemployment surpassed 21 percent as of August 2023, after which Beijing stopped publishing the data—an omission that only deepens concerns.

Structural pressures are also mounting. Europe's push for "de-risking" and Washington's ongoing "decoupling" are constraining China's economic prospects. Beijing's growing isolation—fueled by industrial espionage, intellectual property theft, alignment with Moscow in the Ukraine war, and deepening domestic

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[3] Adam Y. Liu and Xiaojun Li, "Assessing Public Support for (Non)Peaceful Unification with Taiwan: Evidence from a Nationwide Survey in China," *Journal of Contemporary China* 33, no. 145 (2024): 1–13, https://doi.org/.

[4] Mark F. Cancian, Matthew Cancian, and Eric Heginbotham, *The First Battle of the Next War: Wargaming a Chinese Invasion of Taiwan* (Washington: Center for Strategic and International Studies, 2023); and US Department of Defense, "Military and Security Developments Involving the People's Republic of China, 2024."

[5] "National Economy Witness Momentum of Recovery" (press release, National Bureau of Statistics of China, 17 January 2024), https://www.stats.gov.cn/.

[6] Daniel H. Rosen et al., "After the Fall: China's Economy in 2025," *Rhodium Group*, 31 December 2024, https://rhg.com/.

[7] Lingling Wei, "Xi Jinping Muzzles Chinese Economist Who Dared to Doubt GDP Numbers," *Wall Street Journal*, 8 January 2025, https://www.wsj.com/.

authoritarianism—further compounds the problem. Given these trends, China faces increasing difficulty sustaining the economic growth it once enjoyed.

That said, economic distress could also drive Xi toward risk-taking. If he believes seizing Taiwan would revitalize China's economy—by securing critical industries or rallying nationalist support—he may see invasion as a gamble worth taking (see points 5 and 6 below).

Indicator 3: Taiwan people's identity (drifting away from Beijing)

A closing window of opportunity for Xi and China is Taiwan's shifting national identity. Public sentiment on the island has moved decisively away from any identification with China, as Table 2 illustrates. By 2022, only 3.6 percent of Taiwanese identified as Chinese, while 61 percent saw themselves exclusively as Taiwanese—now the dominant self-conception. From Beijing's perspective, this trend is not just troubling; it is a strategic failure of the CCP's long-running campaign of suasion and cultural influence.

Taiwan's democratic system further compounds Beijing's dilemma. Even if a more Beijing-friendly party, such as the Nationalists, were to win power, it could not enact policies that contradict public sentiment. This reality poses an existential threat to China's hopes for peaceful reunification. Given this trajectory, CCP leaders are likely concluding that the longer they wait, the more entrenched Taiwanese identity becomes—and the greater the urgency to force the island's "return to the fold" before the opportunity slips away.

Indicator 4: Chinese demographic decline means China will have less fighting age persons, long-term

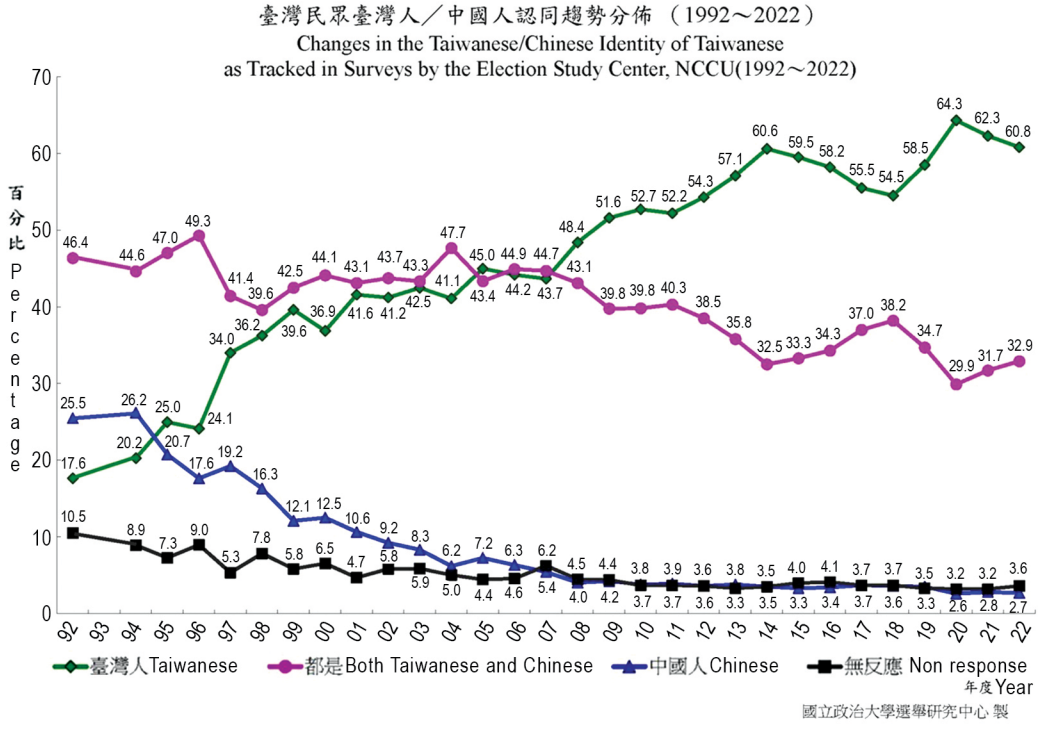
Another key indicator on Xi's dashboard is demographics—specifically, how China's population decline could shape its foreign policy choices. Mark Haas, a leading scholar on demographics in international relations, argues: "Because of high life expectancies and extraordinarily low fertility levels, China is aging faster and to a deeper extent than any other great power, and possibly any country, in history. . . . Aging significantly reduces states' capacity to aggress."[8]

If China postpones resolving the Taiwan issue by another decade or more, its shrinking workforce and aging population could begin to constrain its military options. While this factor may not weigh heavily in the next few years, a longer delay—seven, ten, or twenty years—would leave China with fewer military-age

[8] Mark Haas, *The Geriatric Peace: Population Aging and the Decline of War* (New York: Oxford University Press, forthcoming).

men to sustain a prolonged conflict. The economic and social costs of war would become even more severe, particularly given the lingering effects of the one-child policy, which created a surplus of young men. Now that China has moved beyond that policy, its longstanding gender imbalance may gradually correct itself, further altering the composition of its fighting force.

Table 2. Changes in the Taiwanese/Chinese identity of Taiwanese.



Xi has undoubtedly considered these realities. Here again, acting sooner holds strategic advantages—especially if war risks escalating into a prolonged or regional conflict. Given the likely involvement of the United States, Japan, and possibly others—much as the Ukraine war drew in external players—waiting too long could mean waging war with a weaker hand.

Indicator 5: Importance of Taiwan's semi-conductor industry

Taiwan is home to the world's most critical semiconductor industry, one dominated by a single company: Taiwan Semiconductor Manufacturing Company (TSMC). As *The Economist* noted, "Taiwan produces over 60% of the world's semiconductors

and over 90% of the most advanced ones. Most are manufactured by a single company, Taiwan Semiconductor Manufacturing Corporation (TSMC)."[9]

This dominance provides Xi Jinping with a powerful incentive to seize Taiwan, securing both its semiconductor industry and the economic, military, and strategic advantages it confers. To mitigate this risk, TSMC has begun diversifying its production. It has opened an advanced fabrication plant, or "fab," in Arizona, with additional fabs in development there that will produce cutting-edge 2nm and 3nm chips. New fabs are also planned for Germany and Japan.

For now, TSMC's Taiwan operations remain irreplaceable. However, within two or three years, its overseas facilities will be advanced enough to significantly reduce the impact of any disruption at its home base. This suggests that TSMC's strategic value in Taiwan is at its peak—an important factor in assessing future developments.

Indicator 6: Growing importance of semi-conductor industry to China (vs. China's increasing isolation)

As a manufacturing and export powerhouse, China relies heavily on semiconductors to sustain its economic momentum. Two critical points emerge from this dependency.

First, China's mercantilist economic practices have increasingly tarnished its reputation, casting a shadow over both its state-owned and private enterprises. These practices—favoring domestic firms, manipulating markets, and disregarding intellectual property rights—have fueled global distrust.

Second, the United States, the European Union, and other allies have imposed escalating sanctions and export controls on China, particularly targeting advanced and dual-use technologies. As a result, Chinese companies face mounting difficulties securing the semiconductors needed to support both domestic production and global exports. Many firms now appear on the US Department of Commerce's Bureau of Industry and Security "Entity List," which subjects them to strict licensing requirements for the export, reexport, or in-country transfer of specified items.[10] Companies like Huawei, once technological powerhouses, now struggle to obtain cutting-edge components, machinery, and chips deemed crucial for military or other security-sensitive applications. Consequently, Chinese manufacturers find themselves cut off from the most advanced semiconductors and the tools necessary to produce them.

[9] "Taiwan's Dominance of the Chip Industry Makes it More Important," *The Economist*, 6 March 2023, https://www.economist.com/.

[10] Bureau of Industry and Security, "Entities List," US Department of Commerce, n.d., https://www.bis.gov/.

This semiconductor bottleneck has profound implications for China. One potential solution—however perilous—would be an invasion and seizure of Taiwan, placing the headquarters of the world's most strategically vital chipmaker, TSMC, directly into Beijing's hands. Whether Taiwan would allow TSMC to be captured intact, or whether the company's executives and engineers would cooperate with a Chinese occupation, remains uncertain.[11] Nonetheless, controlling TSMC's physical infrastructure could offer Beijing significant leverage—not least by denying the United States, Japan, and their allies access to its production capacity.

Should China succeed in securing TSMC intact and compelling its key personnel to comply, Beijing would gain what it currently lacks: unfettered access to cutting-edge semiconductors and the technology needed to manufacture them. This would provide a vital lifeline for Chinese industry and its export sector.

Timing, however, is crucial. TSMC's headquarters in Taiwan holds maximum strategic value at this moment. Within two to three years, the company's overseas fabrication plants—in Arizona, Germany, and Japan—will be sufficiently advanced to mitigate the impact of any disruption at its home base. The longer Xi waits, the less critical TSMC's Taiwan operations become. Simultaneously, prolonged exposure to the Entity List's restrictions will continue to erode China's manufacturing capacity, exports, and broader economic stability.

For Xi, this poses an existential dilemma. His regime's security hinges, in no small part, on economic strength. A floundering economy represents perhaps the gravest threat to his hold on power. Thus, the semiconductor struggle—and TSMC's unique position within it—looms large in Xi's strategic calculus. If the conquest of Taiwan remains a temptation, TSMC represents the crown jewel of that ambition—a prize whose value may never again be as high as it is today.

Indicator 7: Growing US commitment to Taiwan

For years, the United States has upheld a policy of "strategic ambiguity" toward Taiwan—a delicate balancing act aimed at deterring both Taiwanese independence and Chinese aggression. In essence, Washington signals to Taipei, "Don't count us in," while warning Beijing, "Don't count us out." This approach, also known as "double deterrence," seeks to maintain the status quo, threading a line between the commitments outlined in the Shanghai Communiqué of 1972 and the Taiwan Relations Act (TRA) of 1979.

[11] Jared M. McKinney and Peter Harris, "Broken Nest: Deterring China from Invading Taiwan," *Parameters* 51, no. 4 (17 November 2021).

The Shanghai Communiqué acknowledges China's position that there is only one China and that Taiwan is part of it, while the TRA obligates the United States to provide Taiwan with the defensive equipment necessary to deter Chinese aggression. Notably, the TRA stops short of establishing a formal defense alliance with Taiwan.

However, on May 23, 2022, during a press conference in Tokyo, President Joe Biden broke with precedent. When asked if the United States would defend Taiwan in the event of a Chinese invasion, he responded unequivocally: "Yes…That's the commitment we made."[12] Despite attempts by the Department of Defense to walk back his remarks, Biden reiterated this position on three subsequent occasions. This marked a significant departure from the traditional posture of strategic ambiguity.

Donald Trump's 2025 return to the White House introduces uncertainty regarding US policy on Taiwan. While Trump appears to have reverted to a stance more aligned with strategic ambiguity, the broader trajectory suggests a deepening US–Taiwan relationship. Despite Trump's own hedging, his foreign policy and defense team remain staunchly hawkish on China—a position that typically translates into stronger support for Taiwan.

Recent trends reinforce this shift. US arms sales to Taiwan and military-to-military cooperation have steadily increased, a pattern unlikely to reverse under Trump's leadership. For Beijing, the outlook appears increasingly grim. Over the next four years, the US–Taiwan bond seems poised to grow stronger, not weaker—further complicating China's strategic calculus.

Indicator 8: US commitment to the ROC has yet to include exercises and/or build-up of interoperability

Unlike its relationships with South Korea and Japan, the United States does not have a formal alliance with Taiwan, nor does it conduct official joint military exercises with the island. While the United States once maintained a mutual defense treaty with Taiwan, this arrangement ended in 1979 when Washington recognized the People's Republic of China as the sole legitimate representative of the Chinese people, simultaneously downgrading its diplomatic ties with Taipei.

According to the Council on Foreign Relations, "Taiwan was . . . a significant recipient of U.S. economic and military aid during the 1950s, 1960s, and 1970s, up until the United States normalized relations with China in 1979 and abrogated its mutual defense treaty with Taiwan. However, in late 2022, Congress passed

[12] Quoted in Ben Gittleson and Adam Carlson, "Biden says, again, that US would defend Taiwan from Chinese invasion," *ABC News*, 19 September 2022, https://abcnews.go.com/.

historic legislation enabling Taiwan to receive U.S. military aid once again—up to several billion dollars a year in loans and grants."[13]

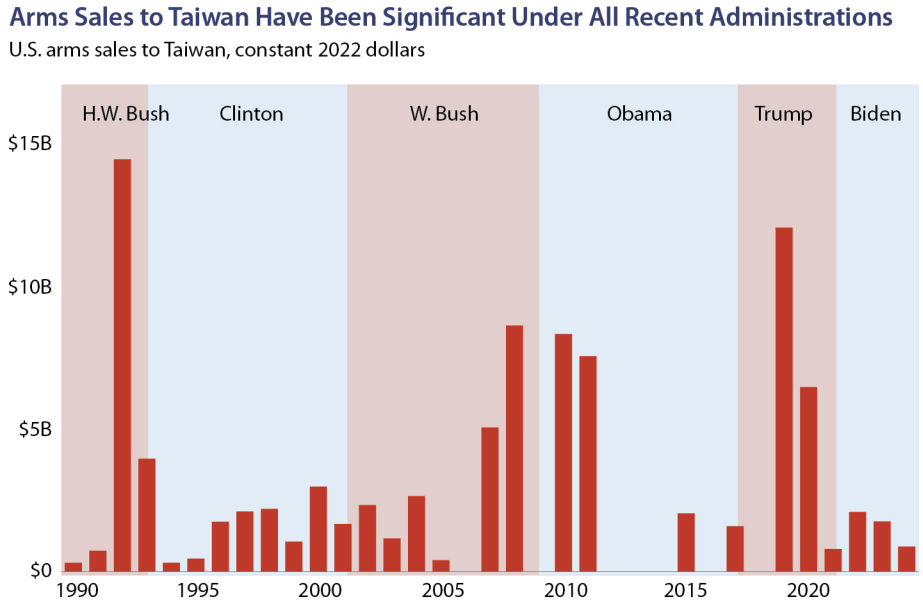
The TRA has long permitted the United States to provide Taiwan with defensive equipment and engage in limited military-to-military cooperation, largely confined to training tied to the use of that hardware. Yet, the TRA stops short of formalizing direct military support. Two key points, however, must be clear to Xi and China's leadership, as highlighted in Tables 3 and 4 below.

First, Republican administrations have historically been more inclined to approve arms sales to Taiwan than their Democratic counterparts. During Donald Trump's first term, US military sales to Taiwan—measured in dollars—surged to levels unseen in 30 years, surpassed only by the George H.W. Bush administration, as shown in Table 3. With Trump in the White House for another four years, it is highly likely that this trend will continue, further complicating Beijing's calculus should it contemplate an invasion of Taiwan.

Second, the United States has now resumed providing formal military aid to Taiwan—distinct from arms sales—marking a significant shift in its support for the island. This added layer of assistance enhances Taiwan's defense posture and increases the strategic costs for China, reinforcing the growing military partnership between Washington and Taipei.

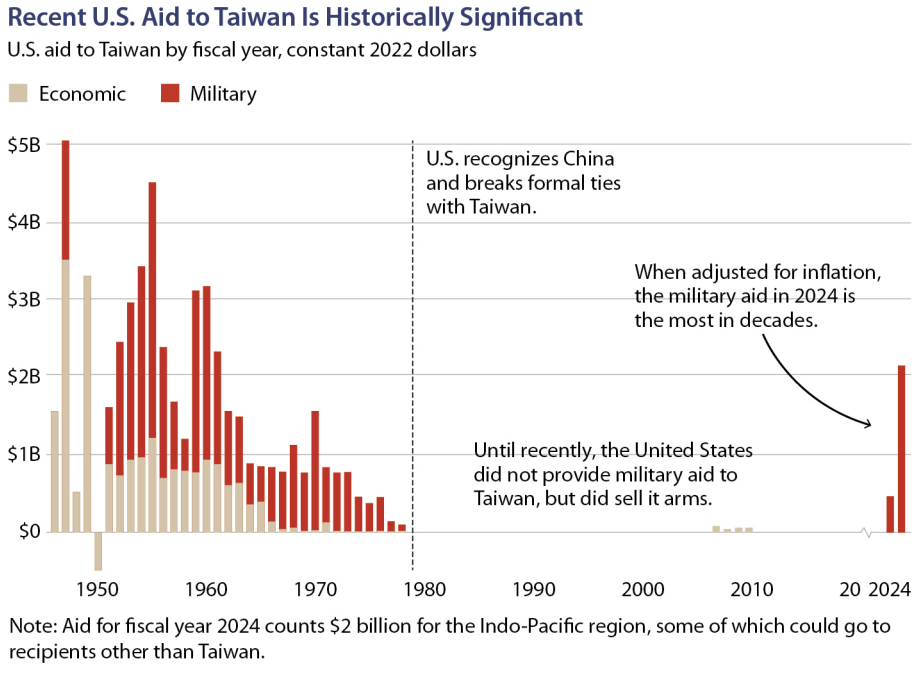
[13] Jonathan Masters and Will Merrow, "US Military Support for Taiwan in Five Charts," *Council on Foreign Relations*, 25 September 2024, https://www.cfr.org/.

Table 3. Arms sales to Taiwan under recent US administrations. (Source: Jonathan Masters and Will Merrow, "US Military Support for Taiwan in Five Charts," Council on Foreign Relations, 25 September 2024, https://www.cfr.org/.)



As Table 4 below indicates, US military aid to Taiwan since 2022 was the most in decades, since the 1960s. It is not yet clear what policy the Trump Administration will take toward Taiwan, but it does not seem likely that it would provide less hardware and aid than did the Biden Administration. For Xi, waiting longer seems likely to result in further US military aid and US sales of military equipment to Taiwan, which would only make conquest of Taiwan more difficult.

Table 4. Recent US aid to Taiwan. (Source: Kelly A. Grieco and Hunter Slingbaum, "No Runways, No Sorties: Chinese Missiles Threaten US Airpower Plans," Defense News, 17 December 2024, https://www.defensenews.com/.)



Indicator 9: China has the current advantage regarding ship-killer/hypersonic weapons

The United States faces a mounting missile dilemma in the Indo-Pacific. US ships and air bases are acutely vulnerable to Chinese missile strikes—so much so that the US Navy may find itself unable to support Taiwan in the event of an attack, while air bases in Japan and Guam could face significant operational disruptions if targeted by China.[14]

Beijing's missile arsenal poses a clear and present danger. Its antiship missiles—such as the YJ-8, YJ-12, DF-21, and DF-26—are designed to push US forces further from the region. The DF-26, with a range of 2,500 miles, puts US military facilities in Guam squarely within striking distance. Even more alarming is China's DF-17, a road-mobile, solid-fueled ballistic missile armed with a hypersonic glide vehicle

[14] Kelly A. Grieco and Hunter Slingbaum, "No Runways, No Sorties: Chinese Missiles Threaten US Airpower Plans," *Defense News*, 17 December 2024, https://www.defensenews.com/.

capable of flying at speeds between Mach 5 and Mach 10. With a range of 1,100 to 1,500 miles, the DF-17 is believed to be adaptable for antiship missions.[15]

While the United States can intercept YJ-8, YJ-12, DF-21, and DF-26 missiles in limited numbers and under ideal conditions, massed salvos would likely overwhelm US defenses. More troubling is that the United States currently has no reliable means to counter the DF-17's combination of speed and maneuverability.

For now, China holds the upper hand at sea due to its advanced antiship missile capabilities. However, this advantage may prove fleeting. As the United States intensifies efforts to develop countermeasures, Xi may see his window of opportunity narrowing—another factor that could push Beijing toward acting sooner rather than later.

Indicator 10: US seeks to field hypersonic weapons/defenses against hypersonics; not yet operational

Compounding the United States' missile dilemma in the Indo-Pacific is the hypersonic missile gap.[16] Since President Ronald Reagan's "Star Wars" initiative, the United States has prioritized building a national missile defense system—a project that took far longer than Reagan ever envisioned but ultimately produced a multilayered defense network. Yet, while the United States concentrated on missile defense, China and Russia pressed forward with the development of hypersonic platforms, designed to outpace and outmaneuver American interceptors. Both nations have now achieved the deployment of operational hypersonic missile systems.

By contrast, the United States has only recently begun to catch up. While it has successfully tested a hypersonic glide vehicle missile, it has yet to field hypersonic weapons in active service.[17] Deploying such weapons would bolster deterrence against China, but perhaps even more critical to the US security posture in the Indo-Pacific is the ability to neutralize an adversary's hypersonic missiles. At present, the United States lacks a reliable means to do so.

Though a Patriot missile system in Ukraine recently shot down a Russian Kinzhal hypersonic missile[18]—and the US Navy's new Aegis SBT is marketed as capable of intercepting hypersonic threats—there is no conclusive evidence that the United

[15] Missile Defense Project, "DF-17," *Missile Threat*, 23 April 2024, https://missilethreat.csis.org/.

[16] Gregory J. Moore, "Hypersonic Tonic: A US New Year's Resolution on Hypersonic Offense and Defense," *National Interest*, 31 December 2022, https://nationalinterest.org/.

[17] "Army and Navy Successfully Test Conventional Hypersonic Missile" (press release, US Department of Defense, 12 December 2024), https://www.defense.gov/.

[18] "Pentagon Press Secretary Air Force Brig. Gen. Pat Ryder Holds a Press Briefing" (briefing, US Defense Department, 9 May 2023), https://www.defense.gov/.

States has a dependable method for countering these advanced weapons. Once again, the PLA holds a distinct advantage. However, this edge may erode with time. The longer Beijing waits, the more likely the United States will deploy effective countermeasures against systems like the DF-17 and develop its own hypersonic arsenal—tilting the balance back in Washington's favor.

Indicator 11: State of relations with US (when poor, lower cost to go; when good, higher cost to go)

The state of China's relationship with the United States—its peer competitor and Taiwan's potential protector—may also serve as a critical indicator on Xi's strategic dashboard. Strong China–US relations, marked by robust trade and diplomatic engagement, raise the cost of any military move against Taiwan, as Beijing would risk considerable damage to its ties with Washington. Conversely, if relations with the United States are poor—or worse, visibly deteriorating—China has less to lose by launching an attack on Taiwan.

This dynamic echoes the principles of the Liberal school of international relations theory, particularly the concept of economic interdependence: nations deeply interconnected through trade and investment are generally less inclined to resort to conflict. However, the current reality is that China–US relations are far from stable and show few signs of improvement—especially with President Trump returning to the White House. Counterintuitive though it may seem, worsening ties between Beijing and Washington could lower the diplomatic cost of aggression, making it easier—not harder—for China to move against Taiwan.

Indicator 12: Xi's view of US intentions toward China (if "hostile," US more likely to support Taiwan)

Closely tied to the state of China–US relations is Xi's perception of American intentions toward China. If Xi believes the United States harbors hostile intentions, he is likely to assume that Washington seeks to use Taiwan as a strategic lever against Beijing—either by supporting Taiwanese independence or by actively defending the island in the event of an attack.

Xi's views on this matter were laid bare in a significant speech delivered at the March 2023 National People's Congress to high-level Party cadres. He stated, "Western countries led by the U.S. have implemented comprehensive containment, encirclement and suppression against us, bringing unprecedented severe

challenges to our country's development."[19] His use of the term *containment* is laden with historical significance, invoking Cold War–era US policies aimed at curbing Soviet expansion.

Xi's rhetoric in this and other recent speeches reflects an increasingly hawkish stance toward the United States. The implication is clear: he likely views Washington as having moved beyond the diplomatic restraint of the Shanghai Communique era and as actively working to thwart Beijing's ambitions—especially regarding Taiwan. From this perspective, reclaiming Taiwan sooner rather than later might seem strategically advantageous, lest the United States further fortify its support for the island or, worse, embolden Taipei to pursue formal independence.

Indicator 13: Taiwan election in 2024 with DPP win (Taiwan is likely to drift further from the PRC)

Before Taiwan's January 2024 election, the political forecast was clear: A victory for the Democratic Progressive Party (DPP) and Lai Ching-te would push Taiwan further from China. A win for the Kuomintang (KMT) under Hou You-yi would likely have maintained the status quo while fostering closer ties with Beijing. A triumph for the Taiwan People's Party (TPP) under Ko Wen-je would have signaled an effort to improve relations with China, as Ko advocated strengthening Taiwan's defenses while pursuing diplomatic engagement. Beijing, for its part, made no secret of its preference for Ko or Hou over Lai.

Lai and the DPP prevailed in January 2024, and Lai assumed the presidency in May. This outcome did not bode well for cross-Strait relations. Within three days of Lai's 20 May inauguration, China launched large-scale military exercises encircling the island, a stark demonstration of its displeasure. Had either of the other candidates won, Beijing might have held out hope for halting—or at least slowing—Taiwan's drift toward away from Beijing. The DPP's victory extinguished that hope, eliminating a potential brake on Chinese military action. From Beijing's perspective, as long as the DPP remains in power, Cross-Strait tensions will not ease. If anything, they are likely to escalate in the coming years.

Other Factors Pointing to a More Near-Term "Go"

Having examined the 13 indicators on Xi's metaphorical Taiwan dashboard, it is worth noting four additional factors that point to a near-term "go" for a potential invasion. These are not indicators in the same sense—fluctuating between "more"

[19] Agence France-Presse, "Xi Condemns U.S.-led 'Suppression'," *Le Monde*, 7 March 2023), https://www.lemonde.fr/.

or "less" likelihood—but rather constants, enduring conditions that reinforce the inevitability of Beijing's perseverance in achieving its objective. The first two are subtle yet longstanding elements of communist rule under Mao and Xi, while the latter two are more recent but equally persistent under Xi's leadership. Table 5 presents these factors, each of which is explored in detail below.

Table 5. Additional factors suggesting a near-term "go" for a Taiwan invasion

Factor	Description
A "Sacred Commitment" to Taiwan	A constant, unwavering, and existential commitment to reclaiming Taiwan.
Authoritarian Decision-Making Risks	The structural flaws of an authoritarian political and military leadership increase the likelihood of hubris and overconfidence.
Xi's Political Incentive	Regaining Taiwan would bolster Xi Jinping's claim to leadership beyond 2027.
PLA Readiness for 2027	Xi has explicitly stated that the People's Liberation Army (PLA) should be prepared to take Taiwan by 2027.

What explains China's fixation on Taiwan? As I have argued elsewhere, Beijing's "sacred commitment" to Taiwan—a constant, unwavering, even existential imperative—holds the key. "'Sacred commitments' explain far more about China's obsession with Taiwan than conventional notions of balance of power or strategic significance." [20]

These commitments are not rooted in pragmatic realpolitik but in an article of faith. They encompass a fusion of emotional, nationalistic, historical, and quasi-spiritual beliefs deeply ingrained in the Chinese psyche. For China's leaders, territorial integrity is sacrosanct, and modern China's founders pledged themselves to the reunification of the motherland—Taiwan included. The identity of China, as defined by its leaders, demands Taiwan's return. The so-called "century of humiliation" cannot be rectified, in the eyes of most on the mainland, until Taiwan is brought back under Beijing's control.[21] There is no room for negotiation. No Chinese leader can abandon the goal of reunification without inviting political suicide.

Beyond ideology, authoritarian decision-making compounds the risk. Xi, like many autocrats, operates in an environment where subordinates fear delivering inconvenient truths. His repeated purges—including the removal of Defense Minister Li Shangfu in 2023—have reinforced this tendency.[22] Josef Stalin's Soviet Union and the Kim dynasty in North Korea suffered from the same affliction: leaders shielded from

[20] Gregory J. Moore, "The Power of 'Sacred Commitments': Chinese Interests in Taiwan," *Foreign Policy Analysis* 12, no. 2 (April 2016): 214–35, https://www.jstor.org/.

[21] Zheng Wang, *Never Forget National Humiliation: Historical Memory in Chinese Politics and Foreign Policy* (New York: Columbia University Press, 2014).

[22] William Matthews, "As China's purge of top military officials continues, will Xi's high-stakes gamble pay off?," *Chatham House*, 3 December 2024, https://www.chathamhouse.org/.

reality, surrounded by officials who tell them what they want to hear. As Stephen Biddle has documented, authoritarian rulers receive less reliable intelligence than their counterparts in open societies. Without contrary perspectives, they are prone to hubris and strategic miscalculation.[23]

This raises a critical question: While many Western analysts insist that China is not yet ready to invade Taiwan, what does Xi himself believe? More importantly, what is he being told? Given the systemic distortions in China's political structure, it is highly likely that Xi is not receiving an honest assessment of the PLA's actual readiness. If his military and intelligence officials, either out of fear or ideological zeal, present an overly optimistic picture, Xi may act on dangerously flawed assumptions—bringing a crisis sooner than expected.

Xi also has a personal stake in Taiwan's fate. Regaining the island would cement his political legacy and strengthen his claim to power in 2027 and beyond. The loss of Taiwan would be a national humiliation for any Chinese leader, but for Xi, it carries added weight. He has already shattered Deng Xiaoping's precedents limiting CCP general secretaries to two terms—he is now in his third—and discouraging rule beyond the age of 70—he is 72. Many within the Party resent his disregard for these norms, and his purges and anticorruption campaigns have created powerful enemies. The next Party Congress in 2027 will determine whether he secures a fourth term, extending his rule until at least 2032. A successful takeover of Taiwan would silence critics and solidify his grip on power.

Adding to the urgency is Xi's reported directive that the PLA be ready to take Taiwan by 2027. While Beijing has not publicly confirmed this, CIA Director William Burns has stated that US intelligence is certain Xi issued the order. As one report summarized, "Burns said that the United States knew 'as a matter of intelligence' that Xi had ordered his military to be ready to conduct an invasion of self-governed Taiwan by 2027."[24] Most China analysts take this seriously. It does not guarantee an invasion, but it signals a clear timeline—one that aligns with the 2027 Party Congress, where Xi's leadership will be assessed. If Xi views Taiwan's fate as tied to his own, the risk of action rises dramatically (see point 3 above).

Conclusions

There is no crystal ball available to us, nor has Nostradamus weighed in. But this study presents compelling evidence that a near-term Chinese invasion of

[23] Stephen Biddle, *Military Power: Explaining Victory and Defeat in Modern Battle* (Princeton, NJ: Princeton University Press, 2006).

[24] Michael Martina and David Brunnstrom, "CIA Chief warns against underestimating Xi's ambitions toward Taiwan," *Reuters*, 2 February 2023, https://www.reuters.com/.

Taiwan—within one to three years—must be considered not just possible but plausible. It also suggests that such an invasion is more likely than not before Xi presents his credentials to Party leadership in October 2027, or even weeks earlier at the Beidaihe leadership conference that precedes it. This conclusion rests on a stark reality: 11 of 13 indicators on what this study identifies as Xi's "Taiwan dashboard" point to a "sooner is better" scenario if Beijing intends to use force.

Military preparedness is one of the few indicators that favors delay. The PLA would undoubtedly benefit from more time. But several mitigating factors suggest this alone may not override the broader strategic calculus. First, authoritarian decision-making—one of the key factors identified in Table 5—creates a critical blind spot. Xi's purges of top military officials mean that those best positioned to "speak truth to power" may already be gone. History offers precedent: Peng Dehuai's downfall under Mao is a cautionary tale of what happens when a Chinese leader is confronted with uncomfortable truths. In such an environment, it is entirely possible that Xi is not receiving an honest assessment of PLA readiness. He may believe the military is more prepared than it is, or he may have convinced himself that decisive action outweighs lingering uncertainties.

Second, this study presents strong evidence that the advantages of striking sooner rather than later are significant. China faces closing windows of opportunity—both in its relative military balance with the United States and in Taiwan's own defense preparations. The longer Beijing waits, the harder an invasion becomes. These pressures may ultimately outweigh any lingering doubts about the risks of acting too soon.

These conclusions are sobering for those who value Taiwan's democracy, its role in global commerce and technology, and the stability of the Indo-Pacific. A Chinese invasion of Taiwan would be catastrophic, with far-reaching consequences. But while we may all hope for a peaceful world, responsible policy must be based on reality, not wishful thinking. Ignoring hard truths does not make them disappear; it only increases the likelihood of being caught unprepared. A clearer understanding of China's interests in Taiwan and Xi's potential calculus is not just an intellectual exercise—it is an imperative. ✪

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