

China's Potential Lessons from Ukraine for Conflict over Taiwan

What lessons for a conflict over Taiwan might China be learning from Russia's invasion of Ukraine and the global responses to the war? And what are the strategic implications of these lessons? To answer these questions, I examine how the war in Ukraine may be shaping China's assessments of the political, military and economic costs of military action against Taiwan, and how these assessments may influence China's decision to use force against Taiwan.

Several caveats are necessary before proceeding. First, it is too soon to understand fully the lessons that China might be learning from the war in Ukraine. The war is ongoing and its outcome remains uncertain. Second, very few, if any, publicly available authoritative Chinese assessments exist that could be used to inform such analysis. As with China's study of previous conflicts such as the Gulf War or Kosovo War, preliminary PLA military assessments of lessons learned are not openly published.¹ What lessons China may be learning remains somewhat speculative at this point.

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I first review China's current approach to Taiwan to provide a context and baseline for how lessons learned from the war in Ukraine might alter China's calculus regarding the use of force against the island. Next, I examine lessons China may be learning in three domains: political and diplomatic, military and battlefield, and economic. Taken together, on balance, these lessons suggest that the costs of military action against Taiwan are greater than China may have anticipated before Russia's invasion. In the short to medium term, these costs will likely induce greater caution in Beijing vis-à-vis the use of force to achieve unification—so long as Beijing does not view the use of force as the only option left.

China's Current Approach to Taiwan

Any assessment of what lessons regarding a Taiwan conflict China might be learning from Russia's invasion of Ukraine and the global response to the war must start with a review of its current approach to Taiwan. China's current approach falls under the policy of "peaceful reunification." This remains China's preferred goal in authoritative CCP documents, such as the 20th National Party Congress work report from October 2022.² Although CCP general secretary Xi Jinping stated in January 2019 that "long-standing political differences can not be dragged on generation after generation,"³ he has set no specific date or timeline for achieving unification, except perhaps in the most general sense as part of China's rejuvenation by "mid-century."⁴ Yet even mid-century, though commonly believed to be 2049, is often not precisely defined. Although China has not foresworn the use of force, and includes several conditions under which it would use force in its 2005 Anti-Secession Law, Beijing does not presently believe it faces a rapidly closing window to achieve unification such that using force today is more attractive than waiting to see what develops and deciding later whether to use force in the future.⁵

Especially in the United States, however, a debate has grown over China's willingness to attack Taiwan, including launching an invasion, and its possible timeline for doing so. Statements by analysts and senior uniformed military officers suggest that they believe China is on the cusp of major military action. In 2021, outgoing INDOPACOM commander Admiral Philip Davidson suggested before the Senate that China would take military action against Taiwan "in the next six years" (by 2027).⁶

Similarly, in 2022, security policy analyst Oriana Skylar Mastro asserted that "there's a 100% chance China will use some sort of force against Taiwan in the next five years."⁷ In early 2023, Air Force General Mike Minihan wrote in a memo that "My gut tells me we will fight in 2025."⁸ In response, senior Biden

administration members provided an official public assessment that an invasion is not imminent. In February 2023, CIA director William Burns stated that “President Xi has instructed the PLA, the Chinese military leadership, *to be ready* by 2027 to invade Taiwan” [emphasis added], but also cautioned “that doesn’t mean that he’s decided to invade in 2027 or any other year as well.”⁹ Other senior US officials affirmed this judgment, including the Undersecretary of Defense Colin Kahl, INDOCPACOM Commander John Aquilino, and Chairman of the Joint Chiefs of Staff General Mark Milley.¹⁰

The discussion about when China might attack Taiwan reflects growing anxiety about Chinese power in East Asia and beyond. Nevertheless, viewing Taiwan as purely or solely a military problem for China would constitute a grave analytic error and misreading of its approach to unification.¹¹ For China, unification is a fundamentally political objective, which means its approach to thinking about the potential use of force must be viewed within this political context. Given the costs of war over Taiwan and its geopolitical consequences, China would prefer a negotiated outcome, even if part of the process of getting to the negotiating table involves coercion short of military force. But even more prominent elements in China’s approach to Taiwan would be the combination of economic carrots and sticks, information operations, and diplomacy—all keyed to talks leading to peaceful unification. Only if China concluded that all other ways to advance unification or forestall independence failed would major military action be considered.

China’s pursuit of Taiwan’s unification focuses on two policy objectives. The first targets the people and leadership of Taiwan. Beijing has communicated in no uncertain terms that Taiwan’s pursuit of “de jure” independence would cross a red line and uses its growing military power to deter Taiwan from taking this step. However, Beijing seeks to deepen Taiwan’s economic dependence on China in order to further raise the economic costs of pursuing independence, and to create vested interests in Taiwan’s society which would support more favorable policies toward Beijing. China wields economic sticks, such as limiting the number of PRC tourists who can visit Taiwan or placing sanctions on specific products such as Taiwan’s agricultural exports. China continues to tighten Taiwan’s international space by reducing the number of states which recognize the Republic of China (Taiwan), and by limiting Taiwan’s role in multilateral institutions and fora. Finally, China engages in ominous displays of military force, such as the August 2022 live-fire exercises held around the island after US Speaker of the House Nancy Pelosi’s visit, and now almost daily flights

Viewing Taiwan as a military problem for China would gravely misread its approach to unification

within Taiwan's Air Defense Identification Zone and across the median line of the Taiwan Strait.¹²

China's second policy objective targets the United States, specifically its "one-China" policy (not to be confused or conflated with the PRC's own "one-China" principle). China seeks to weaken US support for Taiwan—or at least to prevent a deepening of US support that would complicate achieving peaceful unification or enable Taiwan's permanent separation from China—in the hopes that over time, Taiwan will be more willing to negotiate with China over unification. China has expressed serious concerns about the credibility of the US commitment to its one China policy, with Minister of Foreign Affairs Wang Yi calling on the United States in October 2021 "to pursue a real one China policy, not a fake one China policy."¹³ Finally, China seeks to deter or limit the United States from intervening militarily to support Taiwan in the event of a conflict, and so any Chinese consideration of the use of force against Taiwan must also consider the potential US response. As a result, Taiwan has come to play an increasingly central role in US-China relations, becoming entangled in the "strategic competition" between the two countries.

Probable Lessons Learned

The costs of military action against Taiwan are greater than Beijing may have anticipated before Ukraine

The political, military and economic lessons China is likely drawing from the war in Ukraine indicate that the costs of Chinese military action against Taiwan are greater than Beijing may have anticipated before Russia's invasion. In the short to medium term, these costs should induce greater caution in Beijing's calculations about the use of force and bolster its pursuit of different ways to advance its goal of unification.

Political and Diplomatic Lessons

Overall, the politico-diplomatic lessons for China from Russia's invasion are mixed. On balance, however, they highlight new obstacles in the international environment that China would need to overcome in a conflict over Taiwan.

The first and overarching lesson China is likely to draw comes from the speed with which most advanced industrialized democracies in North America, Europe and East Asia formed a coalition to support Ukraine. Diplomatically, these states have clearly and loudly condemned Russia.¹⁴ Economically, they, plus the European Union, have provided the vast majority of aid to Ukraine. Militarily, they

supply arms and ammunition, though only a handful of countries provide most of the weapons.¹⁵ The coalition also seeks to punish Russia by imposing wide-ranging economic sanctions, which symbolize opposition to the invasion and aim to reduce Russia's war potential on the battlefield. Most sanctions imposed on Russia were implemented in the opening weeks of the conflict, involving significant coordination among many states with diverse economic interests.¹⁶ The limits on oil and gas purchases occurred later, in December 2022, but were still significant in terms of the coalition's actions, reflecting its strength.¹⁷

As of this writing, the coalition has remained united after over a year and a half of war. Sanctions have been tightened since the invasion began. As the war has dragged on, the coalition has provided more and increasingly sophisticated weapons to Ukraine. From China's standpoint regarding a conflict over Taiwan, it must consider how countries representing roughly half of the world's GDP will respond. Although sanctions will be discussed below, China may be quite vulnerable in the short term to some of the sanctions that were put in place against Russia. Strategically, China now has even greater incentives than before to split such a coalition, separating Europe from the United States and/or dividing Europe itself, an approach it was already pursuing before Russia's invasion. As one Chinese analyst underscores, "It is very important to us that Europe is not always on the side of the United States."¹⁸ Still, China's political position on the invasion, described by political scientist Evan Medeiros as "pro-Russia neutrality,"¹⁹ which essentially blamed NATO and the United States for the invasion, further alienated many European states who were already reconsidering their future relations with China and highlight the opposition China may confront in a war over Taiwan. Beijing may hope that Europe might be less committed to participating in a coalition to support Taiwan, which some recent polling supports.²⁰ Yet the deepening of the Russia-China relationship may further harden European views of the stakes in a Taiwan conflict, especially as the war drags on and if Beijing begins to provide Moscow with weapons.

A second (countervailing) lesson is that the coalition formed to counter and punish Russia represents a minority of states in the international system. Moreover, fewer than ten states, all in Europe or North America, have provided the bulk of military and economic aid.²¹ The war in Ukraine has adversely impacted many developing countries through inflation, especially when it comes to the price of food. Many of the most important regional powers—such as South Africa and India—have abstained from voting on UN General Assembly resolutions that condemn Russia's actions. India has now become the top importer of Russian oil (surpassing China).²² Advanced industrialized democracies may be united around opposing and punishing Russia, but much of the world probably just wishes the conflict would stop.

For China, the rest of the world's ambivalence likely reinforces the importance that Beijing has devoted to establishing and deepening ties in the Middle East, Africa and Latin America over the past decade.²³ Most of the states in these regions endorse China's one-China principle and maintain diplomatic ties with the People's Republic and not Taiwan, and China is the top trading partner of many of them. As China considers how to limit the diplomatic and economic consequences of potential military action against Taiwan, ensuring and bolstering support from these regions will be a critical element in China's strategy. Although a few of these states, perhaps India for one, might consider joining a

China will likely push especially hard to drive a wedge between Europe and the United States

coalition to support Taiwan, others in the developing world will likely either seek to stand on the sidelines or openly oppose a coalition against China. China may try to mobilize these states at the UN and in regional multilateral organizations which exclude the United States, such as the Shanghai Cooperation Organization (SCO) or the Conference on Interaction and Confidence-Building Measures in Asia (CICA). China may also seek to mobilize other diplomatic mechanisms in its favor, such as the Forum on China-

Africa Cooperation or China's engagement with the Gulf Cooperation Council. Finally, as mentioned earlier, China would likely push especially hard to drive a wedge between Europe and the United States.

A third politico-diplomatic lesson may be China's assessment of future support from Russia in a conflict over Taiwan. On one hand, given the openly hostile relationship between Washington and Moscow, China may conclude that it will receive Russia's unconditional support, perhaps including lethal military aid. On the other hand, over the past year, Russia has not proven to be an especially reliable partner. Putin almost certainly did not inform Xi Jinping of his intent to invade Ukraine when they met on February 4, 2022, during the Winter Olympics in Beijing.²⁴ And China paid a reputational price, as its pro-Russia neutrality has helped to further alienate Beijing from many countries in Europe who view Russia as dangerous and threatening. More recently, the joint statement issued during Xi Jinping's March 2023 visit to Moscow stated that "all nuclear weapons states should refrain from deploying nuclear weapons outside their territories and should withdraw those deployed outside their territories."²⁵ Yet just days later, Putin signaled his intent to deploy tactical nuclear weapons to Belorussia and again made nuclear threats.²⁶ Finally, although Moscow supports the "one-China" principle, Taiwan has not featured prominently in the development of the Chinese-Russian entente over the past

decade. The February 4 statement only included one sentence on Taiwan that merely repeated Russia's previous position. Thus, China may conclude that Russia may not be an especially reliable partner should it invade Taiwan.

A fourth politico-diplomatic lesson includes the role of intelligence sharing, strategic surprise, and the desire for international legitimacy. A striking feature of the run-up to Russia's invasion was the US disclosure of intelligence regarding Russian military preparations and the US intent to build a coalition, deter any attack, deny Russia strategic surprise, and undermine Russian efforts to legitimate an attack through false flag operations. The United States has also used similar disclosures to shape some of China's actions in response to the war, such as news reports in February 2023 that China was considering providing weapons to Moscow.²⁷ Although such disclosures did not deter the invasion, they did facilitate other objectives: they accelerated the formation of a coalition to oppose Russia, they denied Russia strategic surprise, and they weakened Russian justifications and thus legitimacy for its actions (also helpful for building the anti-Russia coalition).

The United States would likely adopt a similar approach in the run-up to a potential invasion of Taiwan or other large-scale Chinese military action against the island, such as seizing Taiwan-held islands off China's coast, assaulting the Pescadores in the Taiwan Strait, or establishing a blockade around Taiwan. China will likely believe that the legitimacy of any military action is rooted in its long-standing goal of unification and will believe that it has much of the world's support or at least acquiescence because they recognize the PRC as China. Nevertheless, depending on when the United States might begin to disclose such intelligence, Beijing may find itself backfooted by needing to justify actions that it has not yet taken. And even though most states recognize the PRC as China, they would likely oppose Taiwan's invasion or at least not actively support it.

The more important effect of such intelligence sharing would likely be its elimination of China's strategic surprise. In Chinese writings on military campaigns, the importance of surprise is underscored and viewed as key to a campaign's success.²⁸ Moreover, the larger the operation—and a “joint island landing operation” would be a very large one—the more time is required to prepare the economy for war and mobilize the hundreds of thousands of troops that would partake.²⁹ It remains unclear how China might respond if it were denied strategic surprise or if preparation time for a major use of force was reduced (though it would also depend on the specific context and the perceived imperative of using force). Nevertheless, this new use of intelligence presents a new challenge for any Chinese plans to attack the island.

Similar to Ukraine, US disclosure of intelligence sharing would likely eliminate China's strategic surprise

In sum, the politico-diplomatic lessons of the Ukraine war are mixed. They highlight obstacles in the international political environment that China would need to overcome. In some cases, China has available remedies, while in others it does not. For example, China's ability to divide Europe and the United States over Taiwan partly depends on its future relationship with Russia. The closer China moves to Russia, the harder it will be for China to divide Europe (or at least the major and most consequential economies in Europe). Thus, the Ukraine war's main lesson for China is to highlight the diplomatic costs it would encounter and the likelihood that it would face a coalition of states which would in turn complicate managing the political costs of an invasion. Five years ago, China likely believed it would only really need to manage the United States, that it could deter the involvement of other regional states, and that it could be relatively confident that Europe would stay mostly on the sidelines. Now, however, all three appear much more uncertain than before.

Major Military and Battlefield Lessons

Beyond these politico-diplomatic lessons, the Russian invasion of Ukraine should provide an opportunity for China to learn many military lessons from the battlefield. In several important respects, China's People's Liberation Army (PLA) resembles the Russian Armed Forces (RAF), as the Soviet Union provided an important model for the PLA when it first pursued modernization in the 1950s at the zenith of the Sino-Soviet relationship. After the Soviet Union's collapse, China and Russia rebuilt their military relationship, with officers studying in each other's professional military academies, senior officer exchanges and dialogues, and increasingly frequent joint exercises.³⁰ China has also closely followed the development of Russian military doctrine and Russia's own "New Look" reforms, which it launched in 2008.³¹ Additionally, the war has provided China with an opportunity to gain insights into some advanced US and NATO platforms as well as US intelligence and surveillance capabilities which could be used in a conflict over Taiwan.

The military lessons China is learning likely reinforce deterrence by highlighting uncertainty over how the PLA would perform in a major conflict and how costly it would be, especially when weighed against the difficulty of the military operations it would need to perform in an amphibious assault. Perhaps many of these lessons are not "new" because the PLA has identified related challenges in its current modernization drive over the past two decades and in its 2016 reforms.³² Nevertheless, they underscore the obstacles the PLA will need to overcome to prevail and may invite new scrutiny about the PLA's own capabilities. As a recent RAND report documents, Xi Jinping remains concerned about the PLA's potential performance in areas such as leadership and command that will be critical in future joint operations.³³ In the short to medium run, as the PLA considers the

implications of Russia's performance for its own readiness, these lessons will likely induce greater caution in decisions to use force, thereby bolstering deterrence.

First, the RAF has faced significant challenges in executing combined-arms operations to conduct a relatively simple military operation: to take and hold territory adjacent to a shared land border. Despite some adaptations in the past year, the RAF has been unable to effectively combine infantry, armor and artillery to achieve significant effects on the battlefield, especially on the offensive. Moreover, it has been unable to conduct any meaningful joint operations, even between only its air and ground forces. In an invasion of Taiwan, the PLA would be attempting to do something much more complicated than combined-arms operations: joint operations with ground, air and naval forces in an amphibious assault across roughly eighty miles of water at its narrowest point. Joint operations among the air and naval forces would also be critical to the success of any blockade and other military actions against Taiwan. The PLA and CCP leadership are both likely wondering whether the PLA will be able to meet Xi Jinping's instruction to be ready by 2027 to conduct operations that are much more difficult than what Russia has attempted in Ukraine. This alone may be the most important military lesson for China.

A second major lesson would be to question the success of large-scale military reforms to improve combat power. In 2016, the PLA began reforms to strengthen its ability to conduct joint operations. The RAF underwent similar, substantial military reforms after its 2008 military intervention in Georgia (the "New Look" reforms), which included a shift from divisions to brigades as the main units of organization within the ground forces and an effort to revamp command and control systems, among other changes.³⁴ Nevertheless, in the first year of the war, Russia's Battalion Tactical Groups (drawn from brigades) faced significant challenges with logistics as well as generating and sustaining major effects on the battlefield, leading the RAF to revert back to divisions in December 2022.³⁵ Thus, the PLA and CCP leadership will likely question the success of the PLA's earlier shift from divisions to brigades and its 2016 reforms, which were larger in scope and ambition than Russia's but also more recent and perhaps not yet consolidated. In November 2022, for example, the outgoing first vice chairman of the Central Military Commission, Xu Qilang, wrote that the PLA "must build strong joint operational command organizations at the military commission and the theater level"—by implication, a striking comment about China's ability to organize joint operations despite the 2016 reforms.³⁶

A third major lesson concerns the pathologies of the RAF's highly centralized command and control and its ensuing inability to delegate battlefield decision-making to junior officers. As a party-army whose decision-making mirrors the CCP's highly centralized structure, the PLA remains likely to go to war with a rigid command system like Russia's. Of course, this lesson is not new. But the

The RAF's poor performance underscores the challenges of a centralized command culture

RAF's poor performance in Ukraine underscores the challenges of overcoming a deeply ingrained centralized command culture.³⁷ Due to the fear of failure within a Leninist system such as China's, lower-level officers are likely to avoid taking

the initiative, even when empowered to do so, lest they be blamed for mistakes or poor performance on the battlefield.

A fourth military and battlefield lesson concerns the effects of missiles in modern conflict. Russia has fired several thousand ballistic and cruise missiles against Ukrainian targets.³⁸ Yet their effect, especially in the first few weeks of the invasion, was limited and did not seem to degrade Ukraine's ability to mount a robust defense such as closing air-

fields, disrupting key logistics hubs, or destroying major supply depots. China has invested heavily in a large arsenal of conventionally-armed cruise and ballistic missiles, many of which would be used in a "joint firepower campaign" over Taiwan. Although Taiwan is much smaller than Ukraine, which might mean that Chinese missile strikes could be concentrated on fewer targets, China would also likely reserve a significant portion of its missile force for US bases or assets in Japan, Guam, and elsewhere in East Asia. As China's "joint firepower campaign" would play a central role in the opening phase of an attack on Taiwan or a coercive campaign, the PLA may be rethinking its prospects for success.

A final and perhaps critical military (and political) lesson for China concerns nuclear deterrence. At the invasion's start, Putin warned other states that any attempt to interfere would be met with "consequences you have never seen."³⁹ Russia's nuclear threats and signaling, along with its first-use posture and large numbers of theater weapons, likely contributed to initial US and NATO concerns about escalation and reluctance to intervene directly and fight alongside Ukraine. In the past, Chinese writings on nuclear signaling—not nuclear use—have focused mostly on how to deter nuclear attacks against China, especially a first strike, as well as conventional attacks on strategic targets.⁴⁰ Now, China might be considering more uses for its rapidly expanding force, to include using nuclear threats to deter US intervention in a Taiwan conflict. As one PLA researcher notes, Russia "sent high-profile nuclear deterrent signals" that "deterred [*shezhi*] NATO from direct military intervention."⁴¹ Nevertheless, Putin's threats have not deterred significant increases in weapons shipments and other kinds of support, especially in 2023, which also suggests the limits of such threats.

At the same time, there are key differences in US commitments to Taiwan and Ukraine that might shape Chinese views about the utility of nuclear threats in a conflict over Taiwan. Put simply, the United States is already much more

committed to Taiwan's defense than it was to Ukraine's before Russia's invasion, so it is hard to determine if similar nuclear threats would work in a conflict over Taiwan. Under the Taiwan Relations Act (TRA), the United States has long maintained a position of treating military action against Taiwan with "grave concern" and pursued a policy of strategic ambiguity about how it would respond militarily. As a result, China's military planning for a Taiwan conflict includes how to deal with direct US involvement. Given these differences, China may draw a different conclusion about the role of nuclear signaling that is more consistent with its previous approach to nuclear weapons: that they might not deter intervention, but would still deter the US from threatening or using nuclear weapons against China in a conflict over Taiwan.⁴²

Other Military and Battlefield Lessons

China may also be learning several other military and battlefield lessons. The first is the impact of corruption on readiness. The PLA (and CCP) have focused on reducing corruption within the military and party since 2012, a concern that remains today.⁴³ The impact of military corruption was on full display in Russia's invasion, with visible effects on readiness and logistics.⁴⁴ China's leaders are likely to wonder just how well corruption has been eliminated from the PLA and redouble anti-corruption efforts, which would likely distract the force and PLA leadership from training and readiness. Indeed, in July 2023, the commander and political commissar of the PLA's Rocket Force were unexpectedly removed from their positions, most likely due to corruption associated with the expansion of the missile force.⁴⁵ In September 2023, reports surfaced that Li Shangfu, China's defense minister and member of the Central Military Commission, had been placed under investigation for corruption.⁴⁶

The second is the quality and reliability of conscript soldiers, who form the backbone of the PLA's enlisted force. In Ukraine, Russia has relied increasingly on mobilized or conscripted soldiers to replenish its ranks. Their limited experience and skills are apparent. The role of conscripts is not unrelated to the centralization of command, but also reflects the lack of training and experience. In the US military, for example, enlisted personnel serve for almost seven years, on average.⁴⁷ In the PLA, conscripts serve for only two years, which might lead the PLA leadership to wonder how ready the force may be to conduct high-intensity military operations in a Taiwan conflict.

A third may be the illusion of a short, decisive conflict. Many wars have started because of the false optimism held by political and military leaders.⁴⁸ PLA writings highlight concerns with sustainment and protracted wars, both in terms of maintaining adequate military supplies as well as the broader impact of conflict on the economy and the destructiveness of modern war.

Many leaders desire or hope for quick victories. Putin appeared to believe that the “special military operation” would be over quickly. Russia’s failure to achieve a quick and decisive victory could induce greater caution in China’s decision-making calculus and assessment that any war can be quickly won (especially when comparing the difficulty of a ground invasion versus amphibious assault). It could also underscore the need to redouble efforts to find new ways to achieve a quick victory based on lessons learned.⁴⁹ Yet, these could take more time to develop, test and adopt. As other lessons discussed above suggest, China may not yet believe it can conduct a large-scale operation quickly or decisively, while smaller operations might fail to achieve strategic-level objectives.

Fourth, the Ukraine war has highlighted a nation’s will to fight once attacked. Taiwan has often been viewed as soft or weak, with a population that might be willing to fold once the first shot is fired.⁵⁰ Taiwan faces many challenges in launching a robust defense against a Chinese invasion, and much work remains to prepare the country to mount a resistance like Ukraine’s.⁵¹ Nevertheless, the rapidity with which Ukraine mobilized its population, and its population’s willingness to fight once attacked is noteworthy. Beijing may need to revise assessments about the feasibility of achieving a quick and cheap victory that assumes Taiwan’s lack of will to resist. Moreover, as recent polling shows, China’s growing pressure on Taiwan since 2016 has backfired, increasing the willingness of the Taiwanese to resist China’s coercion.⁵²

Economic lessons from the war in Ukraine are perhaps less clear-cut than other domains

Economic Lessons

The economic lessons from the war in Ukraine are perhaps less clear-cut than those in other domains. On one hand, although a significant economic actor, Russia’s smaller and less diverse economy, heavily dependent on commodity exports, was relatively easy for the coalition to sanction, despite the impact on energy prices and inflation. By contrast, as an export powerhouse, China’s much larger and more diverse economy is tightly integrated

within global supply chains and trade-related finance, which means sanctions could be much costlier for coalition states (and the global economy as whole).⁵³

On the other hand, when Russia invaded, its trade with Ukraine accounted for less than 1 percent of total trade, meaning any potential trade disruption was not a factor in the decision to invade. By contrast, Taiwan is one of China’s most important trading partners because of the intermediate goods it produces—like semiconductors—that play a critical role in China’s economy. According to

one recent study, the disruption of Taiwan's trade with the world under a blockade scenario would significantly harm China's own economy along with other sanctions a coalition of states might take to impose costs on China.⁵⁴ The prospects of such costs likely will induce further caution for China's leaders when considering whether to use force against Taiwan.

Nevertheless, there are several potential lessons to be drawn from the way the sanctions campaign against Russia unfolded. The first is that the threat of sanctions did not deter Russia from invading Ukraine. Perhaps Putin believed that the war would be so short that states would either be unable to implement a suite of sanctions or that Russia would have achieved its war aims before any sanctions began to bite. Moreover, he also misjudged European countries' willingness to coordinate with each other, as well as the United States, to pay the cost of these sanctions and to start weaning themselves off of Russian oil and gas.⁵⁵ Yet, sanctions may be more credible in a Taiwan conflict because of the coalition's willingness to rapidly place coordinated sanctions on Russia and because of the vulnerabilities that China's greater integration with the global economy create, such as its reliance on the dollar for trade settlement as well as other transactions and for a large portion of its foreign reserves along with its dependence on certain Western technologies.⁵⁶ As a recent study concluded, Chinese experts are quite concerned about the possibility of sanctions.⁵⁷

A second and perhaps more important lesson is that China has now seen at least one countersanctions "playbook" and can take time to prepare countermeasures. China instructed reviews to be undertaken in Spring 2022 regarding its sanctions vulnerability.⁵⁸ Even before Russia's invasion, it also put in place tools to counter sanctions and sanction other states.⁵⁹ Factors to watch will include stockpiling goods which are likely to be sanctioned, further efforts to reduce dollar dependence and internationalize the RMB, growing domestic production of critical intermediate goods such as semiconductors and other ICT components, and increasing the economic dependence of others on China so that they are less likely to support sanctions against it. China will also continue to use economic inducements to weaken or divide a multilateral sanctions regime.⁶⁰

Nevertheless, China might struggle with several challenges in the short to medium term. By nature of its trading relationship with the rest of the world, China's foreign reserves are held in currencies of the states and groups that might be most willing to sanction China—dollars, pounds, yen and Euros. Significant and deep RMB internationalization could possibly take decades, not years, requiring significant reforms such as reducing extensive capital controls and liberalizing its exchange rate that China has been reluctant to pursue.⁶¹ Even though China has developed its own alternative to the SWIFT international payments system, it has only a fraction of SWIFT's participants and is

unlikely to recruit many more states to join.⁶² At present, global trade settlement in RMB stands at about 2 percent.⁶³ And as US actions to limit China's semiconductor industry suggest, China remains vulnerable to sector-specific sanctions, especially those that target chokepoints where it remains dependent on foreign technologies.

Taiwan in the Balance

On balance, the lessons China may be learning after Russia's invasion of Ukraine are likely to generate greater uncertainty about the costs of a future conflict over Taiwan, inducing further caution until Beijing finds ways to reduce these costs. Diplomatically, China will likely pursue a sustained effort to divide advanced industrialized democracies, focusing on Europe, to reduce potential support they might provide as part of a coalition which might form during an invasion of Taiwan. Militarily, China will double down on addressing the challenges related to executing high-end joint operations while remaining uncertain about its ability to prevail. Economically, China will try to "sanction proof" its economy, but creating substantial self-reliance will likely take a long time and be quite costly.

What does all this mean for China's present approach to Taiwan? It helps to underscore why Beijing does not pursue a purely military approach to achieving unification, especially one geared around an invasion or other major military action which could lead to a wider war, particularly one that would involve the United States. Instead, it will continue to use a combination of diplomatic, military and economic carrots and sticks to deter Taiwan from pursuing formal independence, increase its influence and leverage over Taiwan, and at some point open talks on unification.

China's likely lessons from Russia's invasion of Ukraine include important

Overall, China's lessons from Ukraine should keep Beijing focused on its pursuit of peaceful unification

implications for China's Taiwan calculus. If these lessons indicate that major military action against Taiwan may be even more costly or uncertain than China expected before the war, then all else equal, the odds of conflict over Taiwan should be reduced—especially because it is not Beijing's preferred approach to unification. Overall, China's lessons from the Ukraine war should strengthen deterrence and keep China focused on its current pursuit of peaceful unification with other tools of statecraft.

Put differently, if China's calculus regarding the use of force over Taiwan shifts in the short to medium term, it will likely not be based on assessments of enhanced or improved prospects of a military victory. Instead, China may view force as necessary if it perceives that US or Taiwanese actions are approaching or crossing its red lines, threatening or eliminating the likelihood of peaceful unification. The PRC's 2005 Anti-Secession Law lists the exhaustion of the "possibilities for a peaceful reunification" as one reason why it might resort to force. Actions that might lead China to this conclusion could include, for example, the permanent stationing of US military forces on the island or the conclusion of a more formal defense commitment than what is contained in the TRA, which China would view as the US abandoning its one China policy that has helped keep the peace across the Strait since 1979.⁶⁴

In sum, China may be more willing to rely on the military instrument of statecraft if it concludes that the prospects for unification without it are diminishing, not because Russia's invasion of Ukraine demonstrates that force is an even more attractive option or cheaper tool than before. Rather, China's lessons from the Ukraine war suggest the opposite—that war over Taiwan would be even more costly and uncertain. These lessons should help maintain stability across the Strait and enhance deterrence.

Notes

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