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EVALUATION NOTE

WHAT XI'S WASHINGTON VISIT LOOKS LIKE FROM TAIPEI

Chinese President Xi Jinping arrives in Washington this week for a state visit that will be heavy on ceremony and, most likely, light on substance — bypassing² the UN General Assembly in New York for a direct meeting with President Donald Trump.

Xi will be returning the visit Trump made to Beijing in May. For two great powers locked in an increasingly intense competition over who will keep — or gain — the upper hand in the global order, perhaps the best this visit can realistically produce is preserving the status quo and avoiding new fronts.

The two leaders are expected to discuss a broad agenda ranging from trade and tariffs to artificial intelligence, rare earth minerals³ and, definitely, Iran, as Trump continues to praise Xi for staying out of that conflict.⁴ Taiwan may be different: one of the most sensitive issues in the talks — and perhaps the one that Washington will be most reluctant to discuss openly. Xi will most likely introduce the topic in the discussions, but there is little new for either side to say publicly. Trump has already held up approval of a proposed \$14 billion arms package⁵ since his May meeting with Xi. Neither side has much to gain this week from allowing Taiwan to derail the broader effort to keep the relationship stable, particularly six weeks before congressional elections with control of Congress at stake.

¹ <https://www.tepav.org.tr/en/ekibimiz/s/1489>

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² Antoni Slodkowski, "World leaders return to UN amid wars in Middle East and Ukraine," Reuters, September 20, 2026 <https://www.reuters.com/world/china/world-leaders-return-un-amid-wars-middle-east-ukraine-2026-09-20/>

³ Darlene Superville, "Trump will be at the airport to greet Xi when China's leader arrives for his US state visit," Associated Press, September 19, 2026 <https://abcnews.com/US/wireStory/trump-airport-greet-xi-chinas-leader-arrives-us-136577203>

⁴ Steve Holland and Trevor Hunnicutt, "Trump thanks China's Xi, Russia's Putin for being 'neutral' in Iran war," Reuters, June 17, 2026 <https://www.reuters.com/world/china/trump-thanks-chinas-xi-russias-putin-being-neutral-iran-war-2026-06-17/>

⁵ Ben Blanchard, "Defence firm Anduril says US delay on Taiwan arms sales affecting its business," Reuters, September 19, 2026 <https://www.reuters.com/world/china/defence-firm-anduril-says-us-delay-taiwan-arms-sales-affecting-its-business-2026-09-19/>

But after spending several days in Taiwan recently, where the Taipei Economic and Cultural Mission in Ankara invited me as part of a Turkish delegation, I came away wondering whether “preserving the status quo” means quite the same thing when viewed from Taipei. What became clear in Taipei was that Taiwan is not only preparing to survive a war. It is also trying to understand how it might lose ground during something the rest of the world may hesitate to call a war.

Will Trump defend Taiwan? Will Xi invade? Is 2027 the year?

I went expecting to spend much of my time discussing precisely these questions. And I did. But some of the most interesting conversations went somewhere else: to coast guards and shipping, energy and legal jurisdiction, political fatigue and disinformation — and underneath almost all of it, to the uncomfortable question of whether American promises can ultimately be relied upon.

During the visit, we met with think tanks, academics, political figures, security specialists and institutions dealing with Taiwan’s economy and external trade. The discussions cited here were conducted under Chatham House Rule, so I identify those we spoke with by their role or the setting of the conversation rather than by name or institution.

There was one sentence I kept thinking about afterward.

“The war has already begun. It is a war without gunpowder.”

The person saying this was not arguing that a Chinese invasion had secretly begun. The point was different. What he was pointing out was that China does not necessarily need an amphibious assault to begin changing Taiwan’s reality.

One security specialist put the problem another way: “What exactly do we mean when we talk about the ‘status quo’?” he asked.

His answer was the following: If it simply means Taiwan does not formally declare independence and Beijing does not launch a full-scale war, then yes, it survives. But if it means the actual balance of authority and accepted behavior around Taiwan, he argued, it has already been changing.

The median line of the Taiwan Strait once acted as an informal restraint. That has steadily eroded. Chinese military activity around Taiwan has become increasingly routine. Coast guard operations have expanded⁶. Beijing has asserted what it describes as law-enforcement authority in waters around the island.

What this expert was describing was not one dramatic move, but a gradual shift in what is considered normal around Taiwan. First comes a stronger military presence. Then the coast guard. Then the language of law enforcement. And once that becomes routine, the next step is to treat those waters as a matter of Chinese jurisdiction.

And that is what struck me. The danger they were describing was not necessarily invasion. It was the gradual normalization of things that would once have been considered unacceptable.

This also brought up a distinction that Taiwanese security experts said had only recently received more serious attention in Taipei: the difference between a blockade and a quarantine.

⁶ “Chinese coast guard turns to the Pacific,” Bloomberg/Taipei Times, September 13, 2026
<https://www.taipeitimes.com/News/taiwan/archives/2026/09/13/2003864184>

A blockade would leave relatively little doubt about what was happening. A quarantine could be much harder to respond to. One security expert told us that tabletop exercises had tested a scenario in which China gradually tightened its control over the waters around Taiwan without firing a single shot.

The difficult part was not understanding what China was doing. It was deciding at what point, and in what way, the United States or others could actually respond. By the time the outside world agreed that the status quo had been fundamentally altered, some of that change might already have become reality.

From there, the conversation often moved to resilience.

And when people in Taiwan talked about resilience, they were not talking only about weapons or military preparedness. They talked about whether electricity and communications would keep functioning, whether hospitals and banks could operate, whether food and energy supplies could be maintained, and whether local institutions and society itself could keep functioning under pressure.

Taiwan's geography makes all of this more complicated. The sea makes an invasion difficult, but it also means that in a serious crisis the island could find itself cut off very quickly.

What Ukraine Can — and Cannot — Tell Taiwan

Ukraine entered these conversations partly because of geography. But Taiwan cannot simply look at Ukraine and assume that the same model of outside support would work in a crisis. Weapons, fuel and other supplies can continue to enter Ukraine across land borders. Taiwan has no such option. If access to the island is seriously disrupted, keeping Taiwan supplied becomes a very different problem.

But Ukraine also raised the question of how much a smaller country should rely on commitments made by larger powers. As one senior diplomatic figure explained to us, under the 1994 Budapest Memorandum, Ukraine gave up the Soviet nuclear weapons left on its territory and received security assurances from Russia, the United States and Britain.

Those assurances were not a NATO-style obligation to defend Ukraine. But they did not prevent Russia from violating Ukraine's territorial integrity in 2014 or launching its full-scale invasion in 2022.⁷

That does not mean international commitments are meaningless. As this senior diplomatic figure underlined, an assurance, the capability to act, and the political decision to act are not the same thing.

What has Iran taught Taiwan that Ukraine did not?

Ukraine had taken the conversation toward guarantees, outside support and the problem of keeping an island supplied. Iran took it somewhere else.

There were the obvious lessons — drones, asymmetric warfare, how a weaker country can still make life very difficult for a much stronger one. But what came up more than I expected was the Strait of Hormuz.

⁷ See Security Council Report, "UN Documents for Ukraine: General Assembly Documents," including UN General Assembly Resolution 68/262, *Territorial Integrity of Ukraine*, March 27, 2014, and Resolution ES-11/1, *Aggression against Ukraine*, March 2, 2022. https://www.securitycouncilreport.org/un_documents_type/general-assembly-documents/?cbtype=ukraine&ctype=Ukraine

The point was not that Taiwan and Iran are identical. They plainly are not. It was what Hormuz had shown about geography. A relatively narrow stretch of water can suddenly become everybody's problem if enough trade and energy depend on it.

That made the comparison with the Taiwan Strait more interesting. Taiwan may be vulnerable because it is an island, but any serious disruption around it would not stop at Taiwan's shores. A CSIS⁸ study estimated that about \$2.45 trillion worth of goods — more than one-fifth of global maritime trade — passed through the Taiwan Strait in 2022. So any serious disruption to traffic through the Taiwan Strait could quickly become a problem for the global economy, much as disruption in the Strait of Hormuz does. Ships would be rerouted. Supply chains would be hit. Economies far away would feel it.

And China would not somehow sit outside all of this. It depends on those same waters and on the same regional trading system.

The Strait is one of Taiwan's great vulnerabilities. But it is not exclusively Taiwan's vulnerability.

A similar logic appears in semiconductors.

Taiwan's "silicon shield" has become shorthand for its strategic importance: the world depends on advanced Taiwanese chips; therefore, the cost of allowing Taiwan to fall becomes extraordinarily high.

But there is an obvious tension in that argument. The United States itself wants more semiconductor production moved onto American soil. Taiwan also has reasons to diversify production because concentrating so much advanced capacity on one island creates a vulnerability of its own.

So what happens if the silicon shield works so well that everybody starts trying to make themselves less dependent on it?

The argument I heard in Taipei was broader. Semiconductors matter enormously, but Taiwan's strategic relevance does not begin and end with Taiwan Semiconductor Manufacturing Company, TSMC.

There is Taiwan's position in the First Island Chain. Japan. The Philippines. Maritime traffic. America's military position in the western Pacific. And eventually, the credibility of the wider American security architecture in Asia.

The same conversation also raised a more practical form of regional cooperation. One policy specialist pointed in particular to Japan and the Philippines, countries that share Taiwan's position along the First Island Chain. He said growing pressure from China had made trilateral cooperation more important and that those ties were being accelerated.

It was, in effect, a form of minilateralism: Taiwan trying to work more closely with a small group of countries whose own security is tied to what happens around the island.

The same specialist then described what he called a "three-chain" strategy: the First Island Chain as a security network, a chain of democratic partners, and a high-tech and semiconductor supply chain in which Taiwan remains difficult to replace.

⁸ Matthew P. Funairole, Brian Hart, David Peng, Bonny Lin and Jasper Verschuur, "Crossroads of Commerce: How the Taiwan Strait Propels the Global Economy," CSIS ChinaPower, October 10, 2024, updated June 30, 2026. <https://features.csis.org/chinapower/china-taiwan-strait-trade/>

Taiwan cannot decide whether an American president will ultimately send forces to defend it. What it can do is try to make the cost of standing aside much harder for Washington — and others — to accept.

But there was another side to this that came up several times in Taipei. For all the talk about American support, one security specialist told us that Taiwan's own defense planning has to begin with a much less comfortable assumption: it may have to "fight alone."

That does not mean preparing for isolation from the world. Quite the opposite. Taiwan is trying to reduce the kinds of dependence that can be used against it, especially its economic exposure to China, while preserving the kinds of dependence that give other countries a reason to care what happens to Taiwan.

Semiconductors show the difficulty clearly. Taiwan benefits from being difficult to replace, but concentrating so much strategic importance in one industry — and on one island — also creates its own vulnerability. Diversification therefore makes sense. The question is how far it can go before Taiwan also begins to lose some of the importance that gives other countries a direct stake in its security.

A similar tension exists inside Taiwan itself.

The phrase "cognitive warfare" came up several times in Taipei. The concern was not that Beijing had to convince Taiwanese people to support China. It may be enough to make them doubt whether resisting China would be worth the cost.

They argued that China does not need to change everyone's mind. It may be enough to make enough people start wondering. This is a real challenge because these messages aren't built entirely on fiction. They can attach themselves to doubts that already exist in Taiwan. Will the United States really come if there is a crisis? How much can Taiwan itself do against a much stronger China? And after years of impressive economic performance, how much of that prosperity are younger Taiwanese actually feeling?

That last point came up in a discussion with political figures from the governing camp. One participant acknowledged that people under 40 had benefited less from economic growth than earlier generations. They still believed in democracy, he said, but that did not mean they fully trusted the governing party.

There is one limitation worth keeping in mind. We did not have a substantive meeting with the Kuomintang, Taiwan's main opposition party. So much of what we heard about domestic politics came from figures associated with the governing camp or from institutions closer to the current national-security establishment. That does not make those views less useful or less relevant. But it does mean they represent only part of Taiwan's political debate.

None of this means that political dissatisfaction translates into support for China. It does not. But frustration, uncertainty and distrust give Beijing something much easier to work with than trying to persuade Taiwanese society to somehow become pro-China.

That matters for security. Resilience is not only how much ammunition is stored or how many drones can be produced. It is also whether people believe the society asking them to withstand economic pain, disruption and potentially war is worth defending.

The uncertainty extends to China itself.

Several Taiwanese experts explained what Xi's purges inside the People's Liberation Army could mean. One possibility was that removing so many senior officers could temporarily

weaken readiness and command cohesion. But another concern came up as well: what one specialist called the “dictator’s dilemma,” in which officers become increasingly reluctant to tell Xi something he does not want to hear.

These two possibilities do not necessarily contradict each other. Removing senior officers may create short-term disruption without changing the longer-term direction of China’s military buildup. The PLA can continue to become more capable while the political system around its commanders becomes more difficult to understand — including, perhaps, for people inside that system.

Which is also why 2027 should probably not be treated as though someone in Beijing simply circled a date on a calendar. China may be preparing the military to have that capability. That does not tell us when, or whether, Xi would decide to use it. And the uncertainty created by the purges does not necessarily make the Taiwan Strait any safer.

Which brings us back to Washington.

Trump and Xi have plenty of reasons to keep this week’s meeting manageable. Neither side appears to expect a major breakthrough. Keeping trade tensions under control, addressing rare earth minerals and AI, and preventing one dispute from overwhelming the rest of the relationship may already be enough.

Taiwan may not become one of the main public issues coming out of Washington this week. There is little new either side can say about it anyway without creating another problem.

But that is also why what is happening below the level of war matters.

The concern there was not only about what happens if China invades. It was about what happens before that point — when military activity becomes routine, when the coast guard begins doing things that once would have looked exceptional, and when pressure increases without producing the kind of crisis that forces others to respond.

The most consequential changes in the Taiwan Strait may therefore come not when Washington and Beijing decide to confront each other, but while both are still talking about preserving the status quo.