



Debate: Winning in Ukraine Is Critically Important for Deterring a War in Taiwan

TRANSCRIPT

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- **John P. Walters**, *President and CEO, Hudson Institute*
- **Elbridge Colby**, *Co-Founder and Principal, Marathon Initiative*

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A video of the event is available: <https://www.hudson.org/events/debate-winning-ukraine-critically-important-deterring-war-taiwan>

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Peter Rough:

Well, hello everyone. My name is Peter Rough. I'm a senior fellow here at Hudson Institute and the director of our center on Europe and Eurasia. It's a real pleasure to welcome you all today to this debate. I'm confident when the history of our time is written, when future Edward Gibbons sit down to write about our present era, there'll be at least a few passages that begin with the sentence it all started with a tweet. Just a few weeks ago, the Hudson Institute welcomed Taiwanese President Tsai Ing-wen to receive our global leadership award in New York, and on that occasion, our president and CEO, John Walters, published an op-ed in the Wall Street Journal.

Bridge and John linked up on Twitter after that and they proposed a public debate, so here we are today. The proposition that we'll be debating is winning in Ukraine is critically important for deterring a war in Taiwan. The format of debate is that each of them will have 10 minutes for an opening statement, more or less 10, minutes in rejoinder or rebuttal, and then a five-minute closing. Our debaters today, to introduce them, I'll keep this short because I think both of them are likely familiar to all of you. To my left, John Walters, president and CEO of Hudson Institute. John has a long and distinguished career in Washington, beginning in the Reagan administration.

He also served in the cabinet of George W. Bush as ONDCP head, the Office of National Drug Control Policy, and he is, as I mentioned, the top guy here at Hudson, our president and CEO. To my right is Bridge Colby. Bridge is principal and founder of the Marathon Initiative. He also recently published a book that's garnered a lot of attention to Washington, Strategy of Denial, and he served as deputy assistant secretary of defense at the Pentagon during the Trump administration where he's well known for playing an instrumental lead role in the National Defense Strategy of 2018. Bridge, welcome to Hudson. Thanks for being here. The two have flipped a coin. Just kidding. We just decided John would go first and after that, it'll be Bridge's turn. I did practice a Jim Lair impression, but it's so bad I won't subject it to you at all. So John, you're up and enjoy the debate, everyone.

John Walters:

Thank you, and welcome to Mr. Colby and to all in our audience. It's a pleasure to have Bridge Colby join this debate. He and his family have a distinguished record of service to America and I want to recognize that at the outset. Open debate of critical issues before our country is something important and we should do more of it. My goal is not to defeat Mr. Colby. He's a smart and able man. I seek to persuade him maybe over time to join my side. We will debate, as Peter said, the war in Ukraine, specifically our proposition is, as Peter said, winning in Ukraine is critically important for deterring war in Taiwan.

I will defend this statement so that's why I'm beginning. Here, I support the judgment of INDOPACOM Commander Admiral John Aquilino, who recently was asked by Senator Wicker, "There are some who feel our support for Ukraine is taking away from our capacity and credibility in the Indo-Pacific. What do you say?" Admiral Aquilino replied, "Senator, I do not. I believe we have to do both to maintain the peace." Mr. Colby's discussion of these matters tends to emphasize capacity. Action is a result of capacity and will. I will start by focusing a bit on will. First, US victory in Ukraine is essential for generating support for Taiwan at home.

The outcome in Ukraine will shape whether the US intervenes on behalf of Taiwan. Winning in Ukraine will help generate domestic resolve to fight for Taiwan. If we pull back from Ukraine, however, the US will strengthen those isolationist who pit baby formula against defense spending. Success creates a slip stream of confidence which the country is currently lacking after our experience in Iraq and Afghanistan. A victory in Ukraine can restore confidence in our ability to win wars at home and abroad. By contrast, if the public is convinced to abandon Ukraine, it will not then turn around and stand by Taiwan.

After all, if the US winds down mere security assistance for Ukraine, a state we recognize, how can the public be expected to shed blood for Taiwan, which our policy considers a part of China? It is most likely that isolationism will blossom and overwhelm all of us in the pro-Taiwan caucus. Second, US victory in Ukraine is crucial for winning the competition for allies. Last month, Prime Minister Kishida came, became the first post-war Japanese prime minister to visit a war zone traveling to Kiev to denounce Russia's invasion of Ukraine as a disgrace that undermines the foundations of the international legal order. Just weeks ago, Taiwanese President Tsai Ing-wen arrived in New York where she told me and other Hudson guests that Russia's invasion of Ukraine was a wake-up call to us all.

Authoritarianism does not cease its belligerence against democracy. Whatever the debate in DC, our key allies understand that there is a profound link between the war in Ukraine and the security of the Indo-Pacific region. It is unwise to presume we know the situation of our allies better than they know it themselves. Ukraine is seen as a test case of US commitment to allies and partners, not an irrelevant side theater. 45 of 50 states export more to Europe than to China. When we are exporting, that means American jobs. The world knows Europe matters to the United States. It is therefore crucial that the US demonstrates to the world that it is the strong horse in this conflict.

Through military assistance and intelligence support, the United States has enabled Ukraine to crush huge parts of the vaunted Russian military without a single American firing a shot or being under fire. US assistance to Ukraine has also shown the power of the US alliance network. The United States is a catalyzing force and when it leads, it can coordinate levying massive economic sanctions and providing tens of billions in military assistance. To continue the support for Ukraine by pushing Russia out of the country would very much impress allies and adversaries, but if the US instead now freezes the war with Putin ensconced Ukraine, third countries will calculate that the United States has no staying power.

The US cannot even see things through in Europe, they will calculate. How can they be counted upon to defend us? This will spur hedging behavior. Instead of strengthening alliances, it will weaken and risk fragmenting them. Third, a Taiwan only approach exposes the US to a Chinese leapfrogging strategy. A Taiwan only defense allows China to supplant us in other critical regions of the world from Europe to the Middle East, ultimately weakening the balance of power over Taiwan. Take the Middle East. The Obama administration's indifference to that region allowed Russia to establish itself in Syria in 2015, forcing Israeli prime ministers to go to Moscow to address their security needs.

Today, Israel cannot offer meaningful support to Ukraine for fear of blowback in Syria. In Europe, the choice we face is not between security in Europe and peace in the Indo-Pacific. It is between security in both realms and security in neither, and we need to choose both, as Admiral Aquilino said. When Russia launched its large scale invasion of Ukraine last year, the images of

America's disastrous defeat in Afghanistan were only five months old. Had Russia decisively and quickly defeated Ukraine so soon after our collapse in Afghanistan, the geopolitical consequences would have been grave. Europe would be in chaos, our allies would've questioned our resolve, and our adversaries would've been emboldened to challenge us all over the world.

Europe also matters because several allied countries in Europe are world leaders in advanced technologies and scientific research and development including for military applications. If the US pulls back, Europe will be less likely to support Russia, or excuse me, less likely to support Washington economically, politically, and militarily. China would seize on Russia's advance and America's withdrawal to seek new ties with Europe. Given how much China's economic model depends on technological transfer and theft, this would be very well affect the economic balance between China and the US, which in turn would impact the military balance of power. Finally, let me say a bit about capabilities. Helping Ukraine and defending Taiwan are profoundly different things.

The war in Ukraine is not America's war, but an American supported war fought and executed by the Ukrainians. Yes, the US should do more by equipping Ukraine to fight Russia like NATO would. The US could help bring the war to an end more quickly. A war with the CCP to defend Taiwan must be an American war. Taiwan cannot defend itself alone and will require US weapons and tactics to prevail. The weapons that will win each war are fundamentally different. Ukraine needs long range surface-to-surface missiles, air defenses, and tactical air power to win. While Taiwan would benefit from those weapons, defending Taiwan demands state-of-the-art US capabilities in air, sea, undersea, space, and cyberspace. Ukraine needs indirect support.

Taiwan's defense requires a direct commitment of US force. Yes, both Ukraine and Taiwan have asked for stingers, javelins HIMARS, and harpoons, and Taiwan should get those weapons, but it is simply untrue that 1800 stingers, 5,800 javelins, one patriot battery, two harpoons, and 31 Abrams tanks sent to Ukraine will make or break the defense of Taiwan. None of the key US assets needed to defend Taiwan have been allocated to Ukraine and they will not be in the near future. Most of the weapons we have sent to Ukraine so far are US army assets that will have limited use in a Taiwan war. Critical naval, air, space, and cyberspace resources remain in US possession and are not in Ukraine. Lastly, we are strengthening deterrence.

The US has actively stopped buying assets for a Taiwan war unimpeded including rapid production and purchasing of munitions, basing adjustments, filling up and relocating fuel depots, alliance strengthening and interoperability exercises, and bringing NATO closer to US readiness for a Taiwan war. None of these is impacted negatively by the war in Ukraine and perhaps most critically, we are in advanced development testing and scaling of new war fighting technologies that can create great cost and effectiveness advantages for the US and help maintain deterrence. We certainly have a challenging risk and task. However, it does not help to catastrophize this threat. It can be held in context and it is being met, and I believe if we have sound policies and think the larger strategic situation clearly, we will be able to build deterrence and save both our own country and others heartbreak and death. Thank you.

Elbridge Colby:

Well, thank you very much, John. Thanks for the invitation to be here at Hudson with you. It's a privilege and an honor, and Herman Kahn's famous institution especially so I appreciate the opportunity and also I agree with you the opportunity to have a frank and direct debate. My opening statement is going to be a prepared statement and I'll address some of the issues that John's raised in the rebuttal opportunity. So the resolution is winning in Ukraine is critically important for deterring a war in Ukraine. The resolution is incorrect. Why? Because Ukraine is not going to drive Beijing's decision whether to attack Taiwan. Instead, what's most critical for deterring a war over Taiwan is the military balance in Asia.

Namely, US and allied military strength that's relevant to the first island chain, thus supporting Ukraine too much as we're now doing and increasingly look like we may continue to do actually does more to detract from than help our ability to deter a Chinese attack on Taiwan. Let me walk through why this is. Now, I think it's fair to take, as a given, that China wants to subordinate Taiwan. I can elaborate, but we'll simply signpost this in the interest of time. If Beijing does move against Taiwan, I think it's reasonable to assume that Beijing is likely to use its best strategy in doing so, most probably through a direct invasion and if you're interested, I'd commend Dmitri Alperovitch's excellent thread on this, I think about a week ago.

I think it's also fair to take, as given here, that the US has a very strong interest in preventing Taiwan's subordination by Beijing. Likewise, I'll just signpost this in the interest of time. What I will say that is that given the nature of China's military buildup and its own statements and behavior, it's clear that Taiwan would not be the end of Beijing's ambitions. So the question is how do we deter China from attacking Taiwan and not just in some distant future, but as early as the coming years. This is a very practical requirement as the US government has now expressed as an official position, Xi Jinping has given orders to the PLA to be ready to successfully attack the island by 2027. Now, let's start with the basics, especially here. We're in Herman Kahn's institution.

It's commonly accepted that defective deterrence is a product of the combination of sufficient resolve and power. Critically though, strength and resolve are interrelated. The more powerful you are, the easier it is to do something because it won't be so hard or painful. Conversely, the more resolute you are about something, the more you'll be willing to suffer to protect it. This logic is of direct relevance to the problem we're addressing here. Taiwan is, of course, very important to Americans, but let's be frank, it's far from existential. For China, on the other hand, Taiwan is a and perhaps the preeminent national issue. This means that it's reasonable to assume that the balance of resolve in a conflict might very well favor China.

Now this didn't matter much when America was much more powerful than China. Until recently, America could swat away a Chinese invasion of the island at negligible cost, but now, while America is, of course, incredibly strong, so too as China. Moreover, China has numerous advantages with respect to a war over Taiwan. China's been laser focused on adapting its military to take the island for the last quarter-century or more while the US has only woken up to the China challenge over the last few years and only fitfully and imperfectly so. China is 100 miles from the island while America's thousands of miles away, and we can assume that China, as the revisionist power, would have the vital advantages of initiative and likely surprise in any conflict.

The result is at this point, we don't really know who would actually win a war over Taiwan, especially as we look later into this decade. Optimistic assessments indicate that the United

States might be able to blunt a Chinese invasion if Washington acts with ruthless determination and speed, albeit at high cost. Other and perhaps more credible assessments, in fact, the CSIS war game indicated that the classified assessments, I don't have a base for saying that, but that's what they said, are considerably more pessimistic both in terms of the outcome and the casualties that the United States and its allies would suffer. Moreover, and this is critical, the military balance appears to be getting worse, not better, at least until the early 2030s or perhaps later.

I'll address Admiral Aquilino's testimony, which I thought was inaccurate, to put it generously, in the rebuttal. To their credit, the US and allies like Japan, Australia, and Taiwan itself are increasingly waking up to the danger, but we must be super real about this point. These reforms are happening slowly and there are distinct, very concrete limits to how fast all of us can adapt our militaries. The US defense industrial base is a shadow of what it once was, which starkly limits our ability to reshape our forces and it takes years, if not decades, to reshape force structure, munitions inventories, and basing posture.

I would just look at the Wall Street Journal of the Associated Press, US Naval Institute Press just this morning to get a sense of reality. Meantime, Japan is, yes, increasing defense spending, but coming from behind and will only reach 2% of GDP by the year 2027 at best. Taiwan meantime, despite a lot of rhetoric, is reforming its military, but only slowly and unevenly. Taiwan spends a mere two and a half percent of GDP on defense, less than we do, and continues to buy systems manifestly ill-suited for a defensive invasion. They recently just bought an amphibious assault ship to give you a sense of what's going on there. Meantime, China, with the world's largest industrial base, is actively training and equipping its military to seize the island and take on the United States as part and parcel of doing so.

So how do we deter China from attacking in this grim realistic context? It's essential to point out, and this is relevant to what John was talking about, that we cannot prudently rely on the threat of simply imposing costs on China to do so either through nuclear weapons or massive economic warfare. This is basically because with China, we are now in a position of essentially mutual assured destruction both in the nuclear and the economic domains. In these situations, the side that has the resolve and can actually take the stake at issue tends to win. This is actually one of Herman Kahn's core points. Both of these would favor China. It's especially important to highlight the sharp limits of economic warfare here because of its relevance to the Europe debate. Let me put it bluntly.

China is very unlikely to be coerced to give up an attack on Taiwan because of economic warfare. Why? One, economic warfare is unlikely to function well against China, ask President Macron, two, even if it does, it's unlikely to get Beijing to relent, and three, it would cause massive and very damaging retaliation against us if we pursued it. This means that if we rely too much on punishment strategies, our bluff is likely to be called and we would be unlikely to follow through on such an ill-advised strategy. We should bear this in mind when voices say that Europe will pay back our support for Ukraine in a Taiwan conflict. The fact is such support is unlikely to materialize and wouldn't matter very much even if it did.

What we need instead of such incredible and ineffective strategies is deterrence by denial for Taiwan. In practical terms, this means the ability to militarily defeat a Chinese attempt to invade and occupy the island. If China thinks that its invasion would be foiled, it's much less likely to venture on it in the first place. Thus, deterrence is far more likely to hold. Mao Zedong himself

desperately wanted to get his hands on Taiwan, but never tried once Washington, in the days of our unchallenged era and maritime supremacy in the Pacific, made clear it could and would defeat such an attempt. It's for these reasons that deterrence by denial for Taiwan is now the official position of the Pentagon as expressed by multiple senior leaders.

And has received widespread support from the Congress most prominently from key leaders like Congressman Mike Gallagher. The question then is, do we have not only the will, but also the ability at a plausibly endurable cost to deny China a successful invasion of Taiwan? This is the main issue. It's Chinese leaders' perception of this that we must in all prudence assume will most shape Beijing's decision whether to attack. If Beijing thinks it can invade and occupy Taiwan at an endurable cost, it's far more likely to try to do so. If it thinks it's likely to fail, it's unlikely to try. Unfortunately, there are very credible grounds, despite what Admiral Aquilino said, to question our and our ally's ability to meet this standard. So what do we need to do?

At its essence, the US, Japan, and Taiwan, Taiwan's role is critical, must be able to destroy or at least blunt a Chinese amphibious and air assault against the island of Taiwan. This would involve an enormous array of Chinese ships and aircraft, but also almost certainly large numbers of Chinese troops landing on that island of Taiwan. Thus, we must prudently assume that a Taiwan war would be a land as well as air, sea, space, and cyberspace fight. The fact is that the most credible sources indicate we are not nearly as prepared for this extremely exacting struggle as we should be. We don't have enough of the right missiles and munitions for such a fight. Our C4 ISR architecture is not as survivable or as capable for this demanding campaign as it should be.

Our forces are not, despite some positive movement, they're not postured in the right places or survivably as they should be, and our logistics and industrial backbones are not as healthy or as ready as they should be. I can go on. We can and must seek to remedy these deficiencies, but even if we do and we are only partially doing this so far, in fact, Dave Norquist, the former Deputy Secretary of Defense, said the situation with the defense industrial base is actually getting worse still. It will take well into the 2030s before we're in much better shape at best. What we must therefore do until then is to rigorously and carefully husband our munitions and defense industrial based capacity, our key enabling assets like reconnaissance and intelligence capabilities.

Our forces' readiness, our money, and our allies and our people's strength and will, and this is where the issue of Ukraine really comes in. So let me get concrete. One, weapons. Ukraine and Taiwan require many of the same systems to defend themselves and these systems matter a lot. The famous thing about conventional warfare is even narrow advantages can have outsized results. In terms of strike capabilities, both can use HIMARS, ATACMS, GMLRS, ground launch small diameter bombs, javelins, and even switchblade UAVs. Ukraine and Taiwan also rely on many of the same air and missile defenses, which we know are critical in both theaters from stingers up to the Patriot, NASAMS, and AMRAAM interceptors.

Now this isn't an exhaustive list of overlapping requirements, but all of these things are vital to both Ukraine and Taiwan's defense and they're all in short supply, and what goes to Ukraine regardless of it's whether presidential drawdown authority, foreign military financing, or another pathway isn't available for Taiwan and may not be available again for quite some time due to industrial base constraints. Two, defense industrial based capacity. We need the defense industrial base to give genuine and thoroughgoing priority to US, Taiwanese, and Japanese

forces for Taiwan defense. The DIB won't be robust and healthy for years if we're lucky. Until then, we need to rigorously prioritize Taiwan defense.

Three enablers. Admiral Aquilino himself wrote last year that NDOPACOM requires persistent target custody for effective deterrence. That can't happen unless INDOPACOM has the intelligence resources required for persistent battle space awareness. An enormous amount has gone to Ukraine. Taiwan deterrence should get the top priority. Four, money. We've allocated somewhere between \$100 and \$200 billion to Ukraine. That money would've been exceptionally useful for a Taiwan defense. We need to allocate the money to fix our and our allies' perilously under prepared forces for a Taiwan fight. Fifth, political capital. I have a very different view than John. We need to ensure the American people after a generation of forever wars, they're sick and tired of foreign interventions, are ready, willing, and able to support a stout defense of Taiwan, not exhausted in war weary.

Abroad, we need our allies to enable that prioritization in Asia by building up defenses against China and in Europe by stepping up to muster a real European defense capability. Now I want to make something clear in closing. At root, the reason we are in this predicament has nothing to do with the war in Ukraine. It's not Ukraine's fault and Ukraine's war is a righteous one to defend its territory, but the fact is we are where we are and we cannot wish the situation away. It is a grave one and it cannot be fixed easily or quickly. The trade-offs are real, especially when you bear at the front of your mind two things. One, we are behind where we need to be over Taiwan and it's getting worse, and two, the war in Ukraine is unlikely to end soon and in any case, Russia will remain a major threat.

This means that those trade-offs are getting more acute, worse, not better, and the question of how we address that threat and balance our interest is not a matter of platonic fairness, but rather making sure that we Americans can be sure that we protect our highest national interests, and that means preventing China from dominating Asia. Everything, everything, not just Ukraine, but everything we do must be racked and stacked against this, which is, by common acclaim at this point, our highest national priority. It's not Ukraine's fault that we are in these very dire straits with Taiwan, but when you're in a hole, stop digging. The trade-offs are very real. They're getting worse. We need to acknowledge them and we need to implement a realistic strategy to meet our greatest national threat, China, in light of them. Thank you very much.

John Walters:

I'd say where we are now is a difference over whether the either, or strategy is realistic or unrealistic, whether it's necessary or unnecessary. Mr. Colby's position, I would argue, is conceptually problematic and empirically inaccurate. Conceptually, the war in Ukraine is not America's war, but an American supported war predominantly fought and executed not by the US, but by the Ukrainians. Second, the war for Taiwan will be America's war and the US has not lost our focus on this and therefore, supporting the war in Ukraine has not become a distraction or a threat to Taiwan, the potential war against Taiwan by the CCP. The president has made those distinctions.

He has made it clear with bipartisan support there will be no direct US military action in Ukraine, but there will be direct military action by the US should there be a CCP invasion of Taiwan. You said this four times with no qualifications. Moreover, a protracted Ukraine war scenario may well

be a distraction for the CCP's Taiwan strategy, even its global strategy because China is increasingly tied up with Russia's warfare in Ukraine and it's an obligation to help Russia, thus reducing CCP capabilities and the threat level against Taiwan. I'll come back to this. Empirically, America's substantial support for winning the war in Ukraine has not and will not deplete America's military assets required to fight in Taiwan because the nature of the two wars, I repeat, are fundamentally different.

The Ukraine war is predominantly a ground war while the Taiwan war is predominantly a naval, cyber, space, and air war. It's also right now a matter of deterrence, which makes will more important. We should see that the Ukraine war has united more of Europe and NATO. The extent in unity of NATO has never been greater in recent times and since the war in Ukraine started and our assistance there began. In addition, unity in the Indo-Pacific is greater since the Ukraine war and allied assistance began. This increases deterrence. Let me say a bit more about why winning the actual war in Ukraine helps deter a potential conflict over Taiwan. To pull back from Ukraine is really a kind of Dien Bien Phu logic.

By not assisting the French in a critical strategic moment, the US assured decades of brutal conflict in a region which cost us exponentially more. US policy makers need to address the current challenge now rather than wait for a conflict which may develop in the future. Saying that we should prioritize Taiwan over Ukraine is like arguing that the firetruck should be parked at a house down the street to guard against a fire breaking out in the future instead of knocking down the fire at the burning house. The prudent approach would be fight the fire where it is raging while helping a house down the street take steps to prevent a future fire. Our performance in Ukraine is buying us time in Taiwan. We can choose a sequencing strategy.

The success of the US in Ukraine is surely giving China's leadership pause over how a Ukraine conflict might unfold. This is affording us time to address our own defense industrial base shortcomings, which the war in Ukraine has revealed. The war in Ukraine has been and continues to be a battle lab where the next generation of warfare is being developed and tested from decision-centric warfare to unmanned autonomous and attributable systems, to new displays of intelligence fusion. These developments change cost and effectiveness calculations in our favor and can dramatically increase deterrence against the CCP by complicating the calculations for any attacker.

We are testing and learning without American deaths and most of all, we are supporting a display of war fighting that can only challenge CCP military confidence, or in other words, in the overused saying, we can kill the chicken to scare the monkeys. Further, a US victory over Russia weakens China because the two are allies. Policymakers should understand that Russia and the CCP are intimately connected. Russia is the CCP's junior partner on the global stage. Many of Russia and the CCP's strategic goals overlap. Both want to weaken and divide Europe that they can exploit. Both want to weaken the transatlantic alliance so that the free world is divided and more vulnerable. Anything we do to weaken Russia diminishes the threat of the Russia-CCP alliance.

That is, it weakens the CCP. In a joint statement just weeks before the war, Russia and China announce that they "oppose enlargement of NATO" and called for the defensive alliance to "abandon its ideological Cold War approaches." Our adversaries understand themselves to be engaged in a common fight. Several weeks ago, Chairman Xi told Putin while departing the Kremlin, "Right now, there are changes, the likes of which we haven't seen in 400 years and we

are the ones driving these changes." Putin responded, "I agree." What happens in Ukraine will impact what happens in the Indo-Pacific. If Russia is defeated or weakened in the Ukraine, the CCP is weakened.

While there might be no joint Russian-Chinese military planning cell in Beijing or Moscow, it would be naive in the extreme to think the two countries do not have some sort of mutual security understanding in place. After all, since Russia shifted many of its forces involved in the invasion for Ukraine from its eastern military district, the number of Russian troops on or near the country's border with China is at a historic low. It is safe to assume that Vladimir Putin would not have taken such a step without assurances from Beijing that Russia's territory integrity would be respected. By defeating Russia in Ukraine, the US is defeating the CCP's sole major ally on the world stage. This would send a chilling signal to any other countries considering allying with Beijing.

This might be the single most powerful way to boost deterrence today. As I have explained, the war in Ukraine is a massive live fire military exercise teaching us critical lessons about warfare today and how to supply a partner country under attack from its neighbor. This is relevant for Taiwan. The delays in weapons for Taiwan are unrelated to the war in Ukraine. I think you conceded that. Taiwan is supported through foreign military sales and Ukraine is receiving weapons via special drawdown authority, or as under the excess defense articles provisions. Moreover, we were doing next to nothing in foreign military financing for Taiwan before Russia's full scale invasion.

And we continue to lag in FNF since the war began, even stripping a few billion dollars from the most recent National Defense Authorization Act, but Ukraine has been irrelevant to those decisions. What we should be considering is providing Taiwan the same access to weapons as Ukraine via drawdown and EDA mechanisms instead of using the delays in Taiwan shipments as an excuse not to support Ukraine. To the extent Ukraine and Taiwan come into competition over military goods, the US should, as it is doing, shore up its defense industrial base rather than hoarding resources in a strategic crisis with long-term significance. Finally, if the CCP threat is urgent and critical, and that is what Mr. Colby maintains, of course, and I agree.

And that threat is based on channeling economic power into imperialist military power. When I asked whether he would join me in calling for immediate measures to attack the key segments of that CCP economic and military power, he thinks we can't do this. I wonder, and I don't actually believe we can't. Congress already has before it the STAND with Taiwan Act, legislation crafted to be a threat of actions should the CCP attack Taiwan, is intended to be a deterrence measure. Sounds like Mr. Colby thinks those don't work, but what if we did it, acted on it now? Given the threat, would you agree it is time to consider implementing some or all of those provisions to weaken the CCP now, specifically one, sanctioned members of the CCP and CCP affiliated financial institutions and industrial sectors.

Start with entities and individuals involved directly and indirectly in the CCP's nuclear and defense industrial complex. Two, prohibit US financial institutions from investing in CCP affiliated entities. Three, prohibit the listing or trading of CCP affiliated entities on US security exchanges. Four, prohibit the import of certain goods mine produced or manufactured in the PRC. These measures would be designed to weaken the very industrial support from which the power of the CCP begins. Yes, they are retreating, they are withdrawing, they are segmenting, and over time, they will try to become more insulated. Now is the time of maximum vulnerability

as this process continues. If we act now, if we really want to talk about the large strategic picture and the place the United States has to be in to face that strategic threat, these kinds of measures have to be on the table.

Elbridge Colby:

Thanks. I'd like to address a number of the points that Mr. Walters has made very eloquently, but maybe to start out, and it's actually a little bit disorienting to make this in the temple to Herman Kahn, the notion that capability can be assumed and that resolve is so eminent, that's essentially the cardinal thrust of what Herman Kahn was arguing against and I honestly find it a bit disorienting here to have to make an argument that frankly was always critical to the arguments, say, during the Cold War that we had to have the power. It was always the dovish argument, and candidly, it's also disorienting because what you're saying, Mr. Walters, is essentially that the administration's view of the defense budget is correct.

That sequestration was fine, that everything is hunky-dory. You're actually citing administration sources and I actually, it's difficult for me to grapple with it and I'll get into some of the empirics, but I think what I would address to the audience is if you really wanted to deter Xi Jinping, if you really think he's as ruthless as Mr. Walters is saying, and I certainly do, the man lived as a cave in five years, he's a dedicated Leninist, he has jailed, if not murdered his political opponents. Do you think this person is going to actually be deterred by symbolic displays and by economic deterrent strategies that rely on Wall Street collaborating with us and people like President Macron?

No, you would never take that chance. I actually feel as this is a philosophical debate, but it's the philosophy of the schoolyard, which is how do you actually deter somebody like this, and I couldn't disagree more fundamentally with the idea that just a few weapons here or there, just a few weapons here or there and deployed in certain places was the reason France and Britain, well, France in particular, went down to defeat. The French army was considered better than the German army, but the German army knew how to employ it and had, actually, didn't even have better weapons. That's how serious this situation is. So that's how I'd like to start off, and so in that context, I will start with you with the empirics.

And the notion that Ukraine and Taiwan are not overlapping is just untrue and it's untrue when Admiral Aquilino suggests. It's not clear exactly what he meant in his response to Senator Ernst on this point, or Senator Wicker, but it's without question that the Taiwanese are not getting the kind of capabilities that they need and should have and that's partially their fault, but it's also partially our fault. For instance, you mentioned the presidential drawdown authority. Well, that's great, but a lot of those stocks have already been depleted, and of course, Taiwan is a ground war. In fact, that CSIS study I mentioned, the number one finding of that very sanguine, in my view, CSIS study, the importance of Taiwanese ground forces.

Why? Because the Chinese aren't going to go unless they assume they can get large numbers of PLA forces on the ground. Those are going to be using ground forces, air defense, anti-ship capabilities are also relevant in both, and more fundamentally, the capacity and bandwidth of the defense industrial base. Just open the newspaper any day and look how much trouble we're having today was about the difficulty of finding skilled industrial workers, or the expanding the artillery factory in Pennsylvania. This sounds mundane, but this is the level of specificity I see. This is the level of specificity we need to be dealing with, and it's by taking this stuff for granted

that we court catastrophe and that's why I'm being insistent with you all because this is really real.

This is not about what I call peacocking. This is you have got to be at this level and figure it out, and by the way, my assumption is that a lot of INDOPACOM and a lot of the public messaging that the administration's saying is probably overly optimistic. One thing we've seen again and again and again is an underestimate of how many munitions we use, an underestimate of how demanding it is, and that's the mindset I would have. I don't want to get close to the margin with Xi Jinping. I want him to know that he's likely to fail. That's the kind of thing I want to see. So I think I mentioned Admiral Aquilino address that directly. His own command has a \$3.5 billion unfunded request. So obviously, what he said to Congressman Gallagher is frankly inaccurate.

And that was why Congressman Gallagher had the response that he said, that he doesn't have enough munitions. So I think that's why Admiral Aquilino did that. He'll have to answer that. I have no doubt he was getting intense political pressure, frankly, from the administration and others and I think you actually, my sense is that he might be concerned about the messaging to Beijing, to be totally frank, which is actually really worrying. That should really worry us. Secondly, I think there's something that we've allied a little bit about Mr. Walters' theory, which is how is this going to work? Look, there's an argument that you could say the sequencing argument is very convenient, although some of it's most prominent advocates are now saying it may be less realistic than possible.

In theory, we could have said strong support for Ukraine for say three to six months and then we're going to totally pivot, but that has not happened, it's not likely to happen, and the war is unlikely to end. So if your theory is based on victory, it's basically like saying my investment plan is based on winning the lottery. The administration just dumped to Jonathan Lemire in Politico its assessment, and Mark Milley has been saying it publicly, that the Ukrainians are going to have real trouble. So are we going to live in the real world or are we going to live in a world where we're winning the lottery and solving all of our problems? I think we should probably live in the real world.

By the way, I don't think the Russia problem is going to go away. Some of the people say this isn't a choice. They're like, the Russian problem is going to be solved. I don't think Vladimir Putin's a good guy or he's going to give up easily. He's an extremely nasty, basically evil person. So it's not just a matter of wishing the Ukrainians well and believing in them. It is actually having a realistic assessment. That's actually not only in our own people's interest, that's in their interest. So I think that's, and frankly, even if the Ukrainians do succeed in the counter offensive, and I very much hope they do, in fact, my strategy would benefit by having a strong and secure Ukraine as a bulwark against Russia, but even if they do, it could turn into a cross border war.

And in fact, it looks like the Russians are preparing for a long war and by the way, they have the Chinese backing them up. So if we're going to plan on a prudential basis and live in the reality-based community, that's, I think, the reality that we should be grappling with. John mentioned allies, a couple of things. Well, logically, that doesn't follow. I don't agree that our administration has a clear-headed view and accurate view of what our foreign policy should be. So why should I assume that the Japanese and the Taiwanese government have a perfect, indisputable assessment of their own position? In fact, I think a lot of our governments, in fact, I think it's been rare among our allies and the Australians would be a good exception.

The South Koreans might be another, the Indians are another. Walters' written a lot about that. It's actually rather rare and I think they actually, as I said to you and this was the precipitating factor behind our debate, is I actually think they're putting themselves at real risk because I think they may actually have a thinking closer to you, but they're the ones who are going to be really internalizing the cost of that, and just Japan didn't increase defense spending until a year ago. It should have started years ago. When I was doing the national defense, they were talking about they didn't move. Taiwan has built a completely the wrong military for its own survival. So they're manifestly not infallible.

So I think we have just as much right to question their wisdom as to question our own country's government's wisdom. Critical point I want to make here, I touched on towards the end, my strategy and what I'm advocating for is not to abandon Ukraine, just to be very, very clear. I don't take a super specific position because the point I want to drive home is that we should genuinely prioritize Taiwan in a way that is material and meaningful. I think we should make the best for Ukraine, we should do what we can and what's available is leftover. I don't have access to the kind of information analytic talent in a big team to be able to say what exactly that might be, but I'll tell you, having worked in the Pentagon, if people got that demand signal, they would give you a pretty good answer.

And by the way, there is a solution to this problem, which is for Europe to step up, and I think we've seen that the administration taking its pressure off, particularly Germany, that this is really hindered this ability to get the Europeans to step up, and actually, I think my argument is doing the Europeans more favor because if we follow Mr. Walters' position, at some point, you're making war more likely and there will be a vast sucking sound of US forces from all around the world and capacity from all around the world to go to Asia and then if Europe is not prepared, it's going to be much more exposed. So I actually think if you listen to me and you're Europe, you'll be in a much better position in the future. Leapfrogging doesn't work.

I'm a Churchillian in this, especially if you're looking at military power. As Churchill said, if you get things right in the decisive theater, you can put lesser theaters right afterwards and he also said that basically with reference to something like the first island chain. Chinese forces beyond that would be like a cut flower, beautiful, but faded to die. He was referring to some German forces, but Chinese forces in Djibouti will be mopped up later. The decisive fight is in the first island chain and that's the critical piece. John's analogy about the fire truck, the analogy I use is you've got an acute case of pick your migraine headache, which is Russia, very painful, dangerous in some ways. You also have acute heart disease.

You have not yet had a heart attack, but does that mean you should ignore it? No. If you get that heart attack, it could kill you, and dealing with acute heart disease requires not only a change in behavior over time, a long-term solution, but you have to survive the near term. You may have to get a stint and you may have to get that blockage pulled out. That's the right analogy for looking at this. The fact that China and Russia are allied actually increases the need for prioritization because now, it's much more likely that they will act deliberately together and China now has enormous leverage over Russia. So I think it's pretty clear, honestly, that the Chinese are deliberately backing the Russians with exactly the idea of depleting our resources and tying us down in Europe.

Now they're in a situation where they can back the Russians up or if there's peace, they've got all these European leaders coming to Beijing, supplicants, and it said today in the political piece,

one of the things that caught my attention was Europeans and even the administration officials may be saying, well, we'll get the Chinese to help us. What is their demand going to be? It's going to be inhibiting a Taiwan defense. So I think I've hopefully addressed most of the key ones. I think, look, my basic point to all of you is if you really, really, really want to avoid a war, which I do, I really want to avoid a war, why are we getting close, and a lot of things could happen in theory. A lot of you should have been listened to. Maybe we should have had a two war strategy, maybe we should have had a \$1.5 trillion defense budget, but we don't have that now and we don't have time to fix it in that way and we have to live in the real world if we're going to serve the American people's interest. Thanks.

John Walters:

Let me start off with two points on the budget. I don't want to be misunderstood as saying I believe the administration and sequester are a good thing. They were not a good thing, they're not a good thing going forward. We obviously need to spend resources to support the military capabilities that you referred to, including the shortfalls narrowly in the INDOPACOM and Pacific command sectors. I guess the best way to summarize maybe the overarching difference between us is I don't believe the either, or strategy is coherent and I do not believe essentially, the strategy of denial goes far enough. You can't sustain either if you have to choose one or the other. You need to, unfortunately, you need to choose both and you can choose both. Herman Kahn was fond of saying the problem with experts is they have expert blind spots.

They don't see the whole picture. We have to look at the whole picture and I think that's important for this debate. One of the issues about resources comes down to the situation of our own economy and budget. The Biden administration and previous congressional majorities has spent trillions and programmed the spending of trillions more. This spending and the debt it creates threatens America and our economy in multiple ways, including our ability to fund our own defense. Such spending and a variety of other program's spending needs to be stopped or reduced, but the heart of the spending problem is not monies devoted to supporting Ukraine, or frankly, Taiwan narrowly in this sense, and the wasteful spending that has been attached to some of the Ukraine funding is, well, it's wasteful, but it is dwarfed by the trillions at the heart of the problem.

Moreover, various amounts of unwise spending has been unfortunately a feature of every must pass spending bill in Congress for years. Some who want to criticize the Ukraine War focus on this with respect to the Ukraine support, but it seems to me a bit like, well, I'm shocked that Congress is inefficient. In other words, it seems an evasion from the actual spending problem. It seems dishonest to suggest that Ukraine spending is a unique or special cause of waste. It is simply not. I also fear that this straw man argument will be repeated regarding the critical defense spending we have been talking about, and that includes support for Taiwan. Bridge, I hope you will join me in burning down this straw man wherever it's raised by some in Washington. Two, it is now manifest that the CCP, Putin, and Iran are an expanding alliance against America and our allies probing on multiple fronts.

It seems more and more illogical to say that meeting the threat on one part of that front is inherently at odds with meeting the actual threat. This is a false distinction. Further, the emphasis on not responding to the reality of this threat picture seems a doctrine for serious strategic weakness, a vulnerability that invites exploitation by our enemies and it makes it impossible to build a true architecture for deterrence. Let me be clear. If the argument here is

that we cannot meet or defeat or deter one part of the threat, Putin, and the other, Xi, that is a plan for our failure. Our enemies know how to keep pushing when they feel mush. The conclusion of the either, or analysis abandons deterrence and is a strategic blueprint for our defeat. Let's rethink this. Maybe the new Cold War needs a vision from the man who won the old Cold War.

The man who rebuilt deterrence significantly with technological innovation and critically weakened the pure adversary of his time. Of course, when candidly asked to speak about his strategy, he did not talk about denial. He said, "We win. They lose." Some believe it is impossible in our present situation and even a dangerous way to think to go back to those levels. I think you may think that, Bridge, but your position is strategically incoherent, unrealistic, and demoralizing. It's imprudent, it's bad policy. We should also remember what Xi and the CCP fear most is the people of China, the people the communist tyranny must oppress every single day. In fact, it is estimated that the CCP must spend more on internal security than on its imperialist military forces. We need to remember that the people of China are a powerful ally in our struggle against the CCP.

The example of President Reagan reminds us that we should speak directly to the people of China, recognize their aspirations, and let them know that we are allies in the common position and in a common opposition to a genocidal oligarchy. As in the time of President Reagan, some believe speaking this way is dangerous. They are powerful and they are wrong. We need to fix our eyes on the big picture, as Herman Kahn would say. Today, we need leadership with the capacity to see the full strength of that situation and the full strategic needs. They need the courage to move beyond conventional wisdom in some of these areas and they need the persuasiveness to gain democratic consent. We, all of us, need to help and support such leadership. I want to thank Bridge for joining me today in this debate, and I'm going to thank those of you who have been the audience to be with us. Thank you.

Elbridge Colby:

Well, thanks, John. I want to end with an open plea to hawks, honestly, because I think your voices are really missing and it's critical, and I say that very sincerely. This challenge is incredibly real. China is a pure economy to the United States. We have never dealt with that in our history, and when we did deal with superpowers, we did not have leaders, I'm sorry, who followed what John is saying. We had leaders who said, this is what we're going to prioritize in the Second World War, in the Cold War. I talked to Andy Marshall about this when I was doing the National Defense Strategy. They took hard power seriously. I can't believe I have to say this to hawks. What is a hawk except somebody who takes hard power seriously.

I get that there's a resolve element. I get there's an ideology, fine, but we have to take the hard power seriously, and the Chinese are serious as a heart attack and it's not just about the Communist Party and Xi Jinping, they're terrible, et cetera. They have the world's largest industrial base. They have 13 naval shipyards, we have four. One of theirs is bigger than all of ours combined. That's the reality we need to do. So I'm sorry, with all due respect, Mr. Walters, to say that either, or is not serious, it's the opposite of that. If you really had somebody who was trying to make a plan for your country to avoid a war and if we get in a war with the Chinese, we do not know how that's going to go. At best, it would be immensely costly and all kinds of second and third order effects could happen that would be almost certainly be very bad.

And it's very possible that we could lose it. So in that situation, what kind of leadership do you want? Again, I'm not saying that Ukraine needs to go to zero. To the contrary, I think we should try to help them and I've been saying for years, I'm not picking on Ukraine. I said we shouldn't attack Iran a few years ago when that was not so popular either. So my point is let's genuinely prioritize with the things that matter with a man as ruthless as Xi Jinping. It is a little bit arch, but the PLAs not going to be defeated by Taiwan hashtags on Twitter. He's going to be defeated by cold, hard steel, and we cannot wish for things to be better than they are, and I have to say, you worked for President Reagan, but President Reagan delivered.

He delivered big increases, he bought time. Right now, we're potentially in a two war context where we're not prepared and I think that's the thing, and so my parting message in this context is what I have honestly missed from the hawks and my point about defense spending, it's not to be churlish or score a debating point. I'm honestly flabbergasted. I'm here at Hudson and everybody around, a lot of people are saying that Russian nuclear threats don't matter. Well, I thought for the last 40 years, people were talking about the importance of missile defenses. So was that just wrong? Well, if we're in such good shape that Russia's a joke and China, we can handle pretty adeptly, then I guess all that rhetoric about defense spending was untrue. It's the best argument you could possibly hand to people wanting to cut defense spending.

I think we actually need to increase defense spending to keep up with the China threat because I grew up in Asia, I've seen what an East Asian society looks like when it's developed. I grew up in Japan, China's going to be 10X that in terms of population. That's the kind of realism that we need, and I'm just carrying the logical point through and I find myself, and suddenly, you're saying, you're quoting the administration saying things are good and we can do it and we can neatly wrap it up. Of course, we're not going to do that. The Chinese know that we're trying to sequence it. They're, of course, going to try this to tie us down. So the question is how urgently and do you prioritize, and the walk and chew gum are, and of course, it's not true that you can't... In life, you have to make choices.

No investor, you don't go to your investment professional, you say, I'm going to invest everywhere and then we're going to win the lottery. That's our policy. No, no. Here's where I'm going to focus. Here's my logic, here's why. No successful executive is I walk and chew gum at the same time. It's pick your priorities and ruthlessly ensure you meet them, and we all know, despite what's stated in the national strategies, that the actual revealed priority is Russia, Ukraine, and building allies in Western Europe, but this is the group that should be pushing against this and making sure we can get what we do, and I'm not saying we abandon Europe and so forth, and we can get to a better position over time, I hope, but in the meantime, we've got to deal with the reality as it is and I think looking back in the future, I actually think Admiral Aquilino's testimony could be historic and not in a good way.

Not in a good way. I hope he corrects the record, but I think debates like this will be really important and looking back and saying, did people leave everything on the field to try to correct this problem with what it is actually plausible and can be changed in the timeframe we have actually have. You need to bear in mind that 2027 is actually yesterday in defense planning terms. It's not even right now. It's too late. I was talking to an Air Force retired four star general, he said we have very limited ability to do almost anything. So in that case, you're in a hole, stop digging. So that's my perspective on this and I really hope to hear more from the... I consider myself a hawk in some ways, but my purpose here is to do what President Reagan did, which is peace through strength, but that's not peacocking, frankly. So thank you very much.

Peter Rough:

Well, thanks everyone for joining us today. I think Bridge and John went from a first name basis to Mr. Walters and Mr. Colby during that debate. I don't know what that says about the debate, but thanks everyone for being here. Let's give both of our combatants here a round of applause.

Elbridge Colby:

Well done.

Peter Rough:

And please visit hudson.org for more of our programming in the future. Thanks very much.