



**THE WAR IN IRAN AND CROSS-STRAIT STABILITY:
DESPITE DIMINISHED US CAPABILITIES,
A CHINESE ATTACK ON TAIWAN REMAINS UNLIKELY**

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Abstract

The Iran War has diverted US attention and military power away from the Pacific, engendering speculation that China may opportunistically exploit US weakness to attempt forcible reunification with Taiwan. I argue to the contrary that despite weakening the US militarily, economically, and politically, the Iran War has not degraded, and may actually bolster, cross-Strait stability. It does so by reinforcing that time is on China's side. Rather than fighting a costly war over Taiwan, China can exercise patience and achieve reunification peacefully in the future. US weakness also reduces the threat the US poses to China, reducing China's insecurity and its incentive to attack Taiwan preventively.

Introduction

The US attack on Iran has, for the most part, proven disastrous.^[1] Its implications, however, extend well beyond the Middle East. Two questions loom large for the Asia-Pacific: (i) Will the US–Iran war strengthen or weaken the US position in the region? (ii) Will it affect stability across the Taiwan Strait?

I argue that the Iran War has weakened the US relative to China, both generally but especially in the Asia–Pacific, even though it also hurts China in absolute terms. However, the effects of the Iran War are unlikely to significantly alter China's Taiwan calculus, and might in fact reduce the chances of forcible reunification for three main reasons.

First, the Iran War reinforces a key source of cross-Strait stability, which is that China believes time is on its side and that by simply exercising patience it can outlast the US and achieve reunification peacefully, at low cost. Second, China's incentives to retake Taiwan are currently quite weak, and the CCP stands to gain little from immediate reunification either domestically or internationally. The third reason follows from the second. For China to attempt forcible reunification, it would have to be backed into a corner where attacking is less risky than waiting. The Iran War has reduced the possibility of a destabilizing power shift favouring the US, and has thus mitigated China's impetus to take preventive action against Taiwan.

[1] Richard K. Betts and Stephen Biddle, "The Price of Strategic Incoherence in Iran: For America, the War's Benefits Won't Outweigh Its Costs," *Foreign Affairs*, March 27, 2026. <https://www.foreignaffairs.com/iran/price-strategic-incoherence-iran>

How the Iran War weakens the US in the Pacific

Proponents of the war in Iran argued that by bringing about regime change and eliminating the problems which Iran posed in the Middle East, the United States could reallocate resources to Asia to deter China.[2] However, the US has instead shifted military assets out of the Pacific including carrier groups, personnel, THAAD missile defense systems, and munitions that are essential to any confrontation with China.

Not only have vital military assets been diverted, but they have also been drastically depleted in ways that will take years to reverse, even if the platforms are immediately redeployed to the Pacific. The US and its Gulf allies are estimated to have expended over 900 Patriot interceptor missiles in just the first *four days* of the Iran War, more than 150 per cent of the current annual production.[3] Stockpiles of these munitions were already insufficient and cannot be readily replaced through expanded production. For one, the US simply lacks the manufacturing capacity to do so, as many supply chain nodes have little surge capability.[4] But a more important and less appreciated reality is that even if the US increases its manufacturing capacity, it lacks key *inputs* for such munitions, namely rare-earth components that come exclusively from...China.[5] Thus, the US now finds itself in the bizarre position of needing its own rival's permission to prosecute an arms race against it.

Furthermore, the United States has lost the capacity to arm its allies. Not only can the US not deploy the munitions it most needs, but it also cannot sell interceptors and anti-ship missiles to Taiwan, which are by far the most important elements in defending against a cross-Strait invasion. With US munitions depleted by the Iran war and limited capacity to replenish them, Taiwan and other US allies are also unable to procure the defensive capabilities they need from the US. Although the US and Taiwan can adapt to some extent by adopting lower-cost defensive systems and asymmetric strategies drawn from the Ukraine War, they will remain at a qualitative and quantitative disadvantage to China for the foreseeable future.

A related problem is that a hostile Iranian regime will almost certainly remain in place, diverting US attention to the Middle East and away from Asia. After the Iran War, the US will need to rebuild bases and equipment hit by Iranian counterstrikes. Having not defeated Iran, it must also maintain a regional military presence to enforce the eventual peace terms. In short, Iran can now hold US forces hostage in the Middle East, further diverting US attention from the Pacific.

Moreover, even successful regime change would not have appreciably reduced China's influence in the region. Any Iranian government, even a pro-US one, would continue to do business with China. Its firms and technology are already established there, and Chinese state-owned firms will have a huge advantage in their willingness to invest in risky projects both because of their existing connections but also because they will be directed and subsidized by the Chinese government to do so.[6]

[2] Kate O'Keeffe and Shawn Donnan, "US War on Iran Challenges China and 'Axis of Chaos' Partners," *Bloomberg*, March 5, 2026, <https://www.bloomberg.com/news/articles/2026-03-04/us-insiders-see-iran-war-hurting-china-backed-axis-of-chaos>; Zineb Riboua, "The Iran Question Is All About China," *Beyond the Ideological*, March 1, 2026, <https://www.zinebriboua.com/p/the-iran-question-is-all-about-china>; Mariamne Everett, "'We're Going to Make a Tonne of Money': US Senator Graham on US War on Iran," *Al Jazeera*, March 9, 2026, <https://www.aljazeera.com/news/2026/3/9/we-are-going-to-make-a-tonne-of-money-us-senator-graham-on-us-war-on-iran>

[3] Isabel Hilton, "The Iran war could benefit China," *Prospect*, April 1, 2026, <https://www.prospectmagazine.co.uk/world/middle-east/72882/the-iran-war-could-benefit-china>; see also Damien Cave, Chloe Sang-Hun, Javier C. Hernández, and Eric Schmitt, "How the War in Iran Could Help China and Change Asia," *The New York Times*, March 13, 2026, <https://www.nytimes.com/2026/03/13/world/asia/iran-war-china-asia.html>

[4] Denny Roy, "China weathering Iran war with minimal damage," *Asia Times*, March 19, 2026, <https://asiatimes.com/2026/03/china-weathering-iran-war-with-minimal-damage/>

[5] Hilton, "The Iran war."

[6] Talal Hassan, "Strategic Silence: How Beijing May Emerge as the 'Quiet Winner' of the Iran War," *World Geostategic Insights*, March 16, 2026, <https://www.wgi.world/strategic-silence-how-beijing-may-emerge-as-the-quiet-winner-of-the-iran-war/>

In addition, American aggression in violation of international norms has widened the cracks in US alliance relationships, underscoring the image of the US as a hypocritical chaos agent, and of China as a responsible and predictable defender of the status quo order.[7] Combined with China's growing economic weight, these developments reduce incentives for third parties to side with the US in a confrontation over Taiwan and impose economic sanctions on China that would also bring pain upon themselves, although Japan seems to be moving in the opposite direction under Takaichi.

Finally, the Iran War has undermined both the credibility and potency of a US military intervention over Taiwan, for two reasons. On the one hand, the public backlash in the US to the Iran War, including among much of Trump's own party and support base, reduces the likelihood that the American public will support a future intervention on behalf of Taiwan.[8] This potentially compromises the credibility of the US deterrent threat. On the other hand, the Iran War has given China a tactical advantage in a Taiwan confrontation by allowing China to observe US tactics, strategies, and technologies and adapt accordingly, whereas the US has no additional information about China's tactics and capabilities.

Why the Iran War is conducive to cross-Strait stability

In sum, the war in Iran unequivocally advantages China in the long-term and weakens the credibility and potency of US deterrence threats over Taiwan in the short-term. Nevertheless, China remains unlikely to attack Taiwan for the foreseeable future, for several reasons.[9] First, the US performance in Iran should give China pause about its likelihood of victory in a war over Taiwan—provided that the US replaces the assets in the Pacific that were redeployed for the Iran War. The success of a Chinese invasion is widely thought to require preemptive incapacitating strikes on US military assets in the Pacific.[10] Yet US interceptor success rates were upward of 99 per cent, far higher than expected, suggesting that Chinese incapacitating strikes may be less feasible than a cross-Strait operation would require.[11] If US forces were able to intervene, the Chinese invasion force would be quite vulnerable while crossing the Taiwan Strait, and China would no longer have unambiguous air superiority. Thus, to the extent that China's strikes are unlikely to fully incapacitate US bases and carrier groups in the region, the likely success of its initial invasion decreases markedly.

Secondly, the Iran War has highlighted China's sensitivity to external economic disruptions and its prioritization of international stability. This is crucial for almost all of the CCP's paramount goals. Above all, the party prioritizes domestic political stability and the continuation of CCP rule. Along with nationalism, the Party's economic performance is the primary basis of its legitimacy and thus the main basis of domestic stability. Development is also a means to a third CCP goal: achieving great power status and a leadership role in the international system, which itself boosts the CCP's nationalist legitimacy at home and allows it to shape a more secure international environment for an authoritarian one-party state to survive.

[7] Hilton, "The Iran war." Roy, "China weathering Iran."

[8] Joshua A. Schwartz, "Rethinking Reputation: When Fighting to Demonstrate Resolve Backfires," *Journal of Politics*, forthcoming, (2026).

[9] The subsequent discussion omits 'gray zone' policy tools available to Beijing to achieve forcible reunification, such as blockade, economic coercion, and information warfare. China's decision calculus for employing these measures is similar to that of full-scale invasion, in that if they are effective enough to force Taiwan's capitulation, they would almost certainly trigger a US intervention. Such tactics are also less advantageous to China in that they would forego the crucial element of surprise and preemptive attack on US forces. See Brandon K. Yoder, "Will There Be War over Taiwan? Structural Stability and Policy Pitfalls in Cross-Strait Deterrence," *British Journal of Politics and International Relations*, forthcoming, (2026), <https://journals.sagepub.com/doi/10.1177/13691481251391641>

[10] Oriana Skylar Mastro, "The Taiwan Temptation: Why Beijing Might Resort to Force," *Foreign Affairs* 100, no. 4 (2021): 58–67, <https://www.foreignaffairs.com/articles/china/2021-06-03/china-taiwan-war-temptation>

[11] Carter Malkasian, "The Iran War's Real Lessons for China," *Foreign Affairs*, April 10, 2026, <https://www.foreignaffairs.com/iran/iran-wars-real-lessons-china>

The war in Iran has been unequivocally detrimental to all of these goals, and a war over Taiwan would be absolutely devastating. A Taiwan invasion would impose multifaceted economic pain on China. Foremost would be crippling US sanctions,[12] which “would jeopardize Beijing’s access to global finance, data, and markets—ruinous for a country dependent on imports of oil, food, and semiconductors.”[13] The resulting economic disruptions would be estimated to reduce China’s annual GDP by 15–51 per cent while in effect, and permanently compromise China’s economic trajectory thereafter.[14] Participation in a sanctioning coalition by China’s other major economic partners in Asia and Europe with US security ties, while uncertain, has the potential to dramatically augment these effects. But even in the absence of deliberate, coordinated sanctions, the practicalities of war with the US would cut off critical global trade routes surrounding Taiwan, occlude China’s major ports, and damage the global economy upon which China depends.[15]

Furthermore, China’s security would be gravely compromised, not only from a likely great power war with the US, but also from the resulting anti-China balancing coalition among regional neighbours like Japan, India, Korea, Vietnam, Indonesia, and the Philippines, whose threat perceptions would be greatly raised by Chinese aggression toward Taiwan.[16] China’s international status would likewise be obviously diminished by forcible reunification. In the eyes of the international community that can confer status, military aggression would engender fear and resentment of China rather than respect and admiration. As Jude Blanchette and Ryan Hass write, there is “direct tension” between “seizing Taiwan on the one hand and asserting global leadership on the other.”[17]

The third reason that invasion of Taiwan remains unlikely is at least as important but is far less appreciated: it is unclear how much the CCP would benefit from reunification domestically.[18] The Party’s hold on power is currently quite secure, leaving little immediate need to boost nationalism by invading Taiwan.[19] In this context, attempting forcible reunification carries nothing but downside for domestic stability—it would undermine the CCP’s already shaky performance legitimacy by devastating the Chinese economy, and risk backfiring if the attempt fails by destroying a pillar of the CCP’s claim to nationalist legitimacy.[20]

Indeed, sustaining nationalist legitimacy is arguably more effectively advanced by gradually progressing *toward* reunification rather than actually achieving it. A *de facto* independent Taiwan allows the Chinese government to engage in saber-rattling over Taiwan whenever domestic strife arises, which can serve as a

[12] Jennifer Kavanagh and Stephen Wertheim, “The Taiwan Fixation,” *Foreign Affairs*, February 25, 2025.

<https://www.foreignaffairs.com/taiwan/taiwan-fixation-kavanagh-wertheim>.

[13] Jude Blanchette and Ryan Hass, “The Taiwan Long Game: Why the Best Solution Is No Solution,” *Foreign Affairs* 102, no. 1 (2023): 102–114, 109, <https://www.foreignaffairs.com/china/taiwan-long-game-best-solution-jude-blanchette-ryan-hass>

[14] Stephen G. Brooks and Benjamin A. Vagle, “The Real China Trump Card: The Hawk’s Case Against Decoupling,”

Foreign Affairs 104, no. 2 (2025): 10–19, <https://www.foreignaffairs.com/united-states/real-china-trump-card-brooks-vagle>

[15] Rachel Metz and Eric Sand, “Defending Taiwan: But...What Are the Costs?” *Washington Quarterly* 46, no. 4 (2023): 65–81, <https://www.tandfonline.com/doi/full/10.1080/0163660X.2023.2285165>; Michael O’Hanlon, “How to Defend Taiwan:

Leading with Economic Warfare,” *Washington Quarterly* 44, no. 4 (2021): 183–196,

<https://www.tandfonline.com/doi/full/10.1080/0163660X.2021.2020459>

[16] Rachel E. Odell, Eric Heginbotham, Bonnie Lin, David Sacks, Kharis Templeman, and Oriana Skylar Mastro, “Strait of Emergency? Debating Beijing’s Threat to Taiwan,” *Foreign Affairs* 100, no. 5 (2021): 216–229,

<https://www.jstor.org/stable/27121383>; Jared M. McKinney, “Stake Inflation in Foreign Policy: Is Taiwan the Ultimate

Domino?” *International Affairs* 101, no. 4, (2025): 1361–1379, <https://academic.oup.com/ia/article-abstract/101/4/1361/8153599?redirectedFrom=fulltext>

[17] Blanchette and Hass, “The Taiwan Long Game,” 109

[18] Yoder, “Will There Be War.”

[19] See for example, Kai Quek and Alastair Iain Johnston, “Can China Back Down? Crisis De-escalation in the Shadow of Popular Opposition,” *International Security* 42, no. 3 (2017): 7–36, <https://direct.mit.edu/isec/article/42/3/7/12183/Can-China-Back-Down-Crisis-De-escalation-in-the>;

Jessica Chen Weiss and Alan Dafoe, “Authoritarian Audiences, Rhetoric, and Propaganda in International Crises: Evidence from China,” *International Studies Quarterly* 63, no. 4 (2019): 963–973,

<https://academic.oup.com/isq/article-abstract/63/4/963/5559531?redirectedFrom=fulltext>

[20] Jude Blanchette, “Xi’s Gamble,” *Foreign Affairs* 100, no. 4 (2021): 10–19, <https://www.foreignaffairs.com/china/xis-gamble>;

Suisheng Zhao, “Is Beijing’s Long Game on Taiwan About to End? Peaceful Unification, Brinkmanship, and Military Takeover,” *Journal of Contemporary China* 32, no. 143 (2023): 705–726,

<https://www.tandfonline.com/doi/abs/10.1080/10670564.2022.2124349>

potent diversion around which Beijing can rally popular support in both the present and the future.[21] More generally, Taiwan's current status sustains the CCP's narrative of foreign oppression and its construction of the US as a threat, which drives national solidarity and support for the government. Importantly, the CCP's tough talk and pursuit of the *capability* to take Taiwan does not necessarily imply intent to do so. These behaviours also serve as signals of progress toward national rejuvenation to its domestic audience, and of credible deterrence against *de jure* Taiwanese independence.[22]

Fourth, the Iran War in some ways *reduces* China's incentives to attempt forcible reunification. These are twofold. First, given the weak propelling motivations for China to invade, the greatest threat to cross Strait stability is not waning US capabilities, but instead *rising* US capabilities. Such dynamics could prompt China to perceive a closing window of opportunity and compel a preventive attack on Taiwan to forestall unacceptable revision of the status quo in the other direction—toward *de jure* independence—which could jeopardize China's long-term domestic stability.

In this respect, the deleterious effects of the Iran War on the US capacity for rearmament in the Pacific may *enhance* cross-Strait stability. Projected US military weakness forces the US into a middle-ground deterrence posture that reassures China and reduces its long-term vulnerability, ameliorating the aforementioned security dilemma dynamics that could incentivize a Chinese attack on Taiwan. Indeed, in interviews, "quite a few Mainland elites mentioned...the Mainland having no intention to unify by force as long as there is no provocation from the United States and Taiwan." [23] As argued elsewhere, although US planners are acutely aware that they cannot allow their military capabilities to deteriorate too far, there is far less appreciation that stable deterrence also requires that US capabilities not be projected to rise too far, and must instead fall in a middle range to maximize cross-Strait stability.[24]

The second salutary effect of the Iran War for cross-Strait stability is related to the first: it exacerbates long-term US decline through strategic overstretch, highlights its self-destructive tendencies, and underscores for Chinese leaders that time is on their side. With US domestic politics and international leadership in disarray, China has little need to undertake risky, costly action to achieve reunification with Taiwan. This is especially true given current US unpredictability and eagerness to resort to military force: "A United States that is less stable, more militarized, and increasingly reliant on force...may be more dangerous in a Taiwan crisis, not less. If Beijing believes that Washington is behaving like a late-stage empire—declining in legitimacy and confidence but still unmatched in hard power and eager to use it—then provoking a clash becomes far riskier." [25] These dynamics are particularly pronounced under the current US government, but hyperpolarization and general political incoherence in the United States domestically suggests that similar patterns are likely to continue under future administrations.

Instead, for Chinese leaders, simple forbearance will allow the US to eventually cannibalize the political, economic, and military sources of its own power while China pragmatically weathers the storm and gains relative power and prestige both in the Asia-Pacific and globally. At that point, China will obtain the overwhelming leverage to achieve its goals peacefully, including reunification with Taiwan. Because China faces no imperative to achieve reunification quickly, it can exercise patience, focus on its own development, and win without fighting. In these respects, Trump's ill-advised adventure in Iran may have counterintuitively enhanced cross-Strait stability by bolstering China's long-term optimism.

[21] Weiss and Dafoe, "Authoritarian Audiences.;" Zhao, "Beijing's Long Game."

[22] Scott L. Kastner, *War and Peace in the Taiwan Strait* (Columbia University Press, 2022); Wang Jisi, "The Plot Against China? How Beijing Sees the New Washington Consensus," *Foreign Affairs* 100, no. 4 (2021):48–57, <https://www.foreignaffairs.com/articles/united-states/2021-06-22/plot-against-china>

[23] Taiyi Sun and Dennis Lu-Chung Weng, *The Myth of War in the Taiwan Strait: Elite Perspectives from Beijing, Taipei, and Washington amid the Yizhou Dilemma* (Lexington Books, 2024), 73.

[24] Runhua Bai and Brandon K. Yoder, "How the US Should Re-arm in the Asia-Pacific: Balancing Deterrence and Reassurance over Taiwan," *China International Strategy Review*, forthcoming (2026); Oriana Skylar Mastro and Brandon Yoder, "The Taiwan Tightrope: Deterrence Is a Balancing Act, and America Is Starting to Slip," *Foreign Affairs*, May 20, 2025. <https://www.foreignaffairs.com/taiwan/taiwan-tightrope-mastro>.

[25] Zongyuan Zoe Liu, "What the Iran War Means for China: Beijing Fears American Volatility More Than American Power," *Foreign Affairs*, March 30, 2026, <https://www.foreignaffairs.com/china/what-iran-war-means-china>

Recommendations and conclusion

In the wake of the Iran War, there have been frequent suggestions that reduced US capabilities and focus on the Pacific theatre have provided an attractive opportunity for China to attempt immediate reunification, thereby raising the risk of a war over Taiwan. This policy brief has argued, to the contrary, that the Iran war has, if anything, likely reduced the probability of such drastic action on China's part.

Nevertheless, the US can do more than it currently is to further encourage such prudent forbearance on the Chinese side.

First, **any upgrades to US military capabilities in the Asia-Pacific should be moderate, non-provocative, and downplayed** until they are firmly in place. These measures will minimize the chances that China perceives a closing window of opportunity that would incentivize a preventive invasion.[26]

Second, US degradation of strategic ambiguity and the 'one-China policy' has made Chinese leaders increasingly anxious that the US will support Taiwanese independence. **The US should instead send diplomatic signals that reassure China of benign US intentions** and allow Chinese leaders to save face domestically.[27] Most straightforwardly, the US should emphatically reaffirm its opposition to Taiwan's de jure independence and its support for a peaceful resolution. This entails halting provocative actions like official diplomatic contact, characterizing Taiwan as a country, and calls for an alliance relationship. Such symbolic restraint would allow China's leaders to maintain the optics of progress toward reunification and save face with their domestic audience, while reinforcing their optimism that peaceful reunification remains likely regardless of the military balance.

Even more effective reassurances would concern economic policy, both to increase China's stake in preserving the status quo and to signal benign US intent. **Curtailing the ongoing economic decoupling** would help ameliorate Chinese perceptions of US intent to 'split' Taiwan from China as part of a containment strategy. Economic interdependence sustains US leverage over China by facilitating heavier sanctions in a Taiwan crisis.

Overall, although China's clear incentive is to simply wait out US volatility and win without fighting, these measures by the US would make choosing stability even easier for China.

[26] Bai and Yoder, "How the US Should Re-arm."

[27] Mastro and Yoder, "The Taiwan Tightrope."



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