Marshall here. Welcome back to The Re-alignment.
Hey, everyone. Welcome back to the show. Today's episode is a follow-up that marks the passing of the one-year anniversary of Russia's invasion of Ukraine. Last year, towards the start of the war and my 30-day series, I interviewed Elbridge Colby. Elbridge is the author of The Strategy of Denial, American Defense in Age of Great Power Conflict, and he was the lead architect of the 2018 National Defense Strategy. Last year's episode focused on how the war in Ukraine relates to the
Asia Pacific, specifically whether it would either encourage or discourage a Chinese invasion of Taiwan. I know this episode actually did really well because folks had a lot of thoughts on that topic, so this is a great way to check in with a previous guest to see how their thought has evolved over the course of the past year. All that said, hope you all enjoy this conversation, and thank you to Lincoln Network for supporting The Re-alignment.
Elbridge Colby, welcome back to The Re-alignment. Great to be with you, Marshall.
Yeah, we're nearing, obviously we're past the one-year anniversary of the war in Ukraine, but also we're nearing when we first published one of our first initial response episodes, which is basically titled, Is Taiwan Next? It was based upon an article that you put out in the Wall Street Journal, so let's just start by revisiting that piece. Your central claim point of advocacy takeaway was a war in Ukraine could serve as a humongous distraction to the United States' priorities in Asia, specifically Taiwan. You were explicitly concerned about a very, very, very large ramped-up US troop presence in Europe. How do those concerns feel today, and how over the course of the year did you think that dynamic played out? Well, thanks, Marshall. It's great to be with you and a pleasure and a privilege. Unfortunately, I fear that I think my fears were well-grounded. I think they, unfortunately, have been vindicated. I mean, I think if you look at the situation today, you have a large US troop presence considerably larger than before the war. That was notionally sort of discussed as being temporary, but there are no signs of it declining anytime soon.
More fundamentally, you have, I would say, consuming attention by the United States political establishment on Ukraine and on Europe. The United States, I believe, I mean, figures differ, but I saw in reputable reporting, I think, $112 billion, which has gone to Ukraine. And to be, and just to be clear for those who don't know my position, my position is that we should support Ukraine, but consistent with the genuine prioritization of rectifying the military balance and the strategic balance in Asia. And that is not happening. I would say that there has been some progress sort of on the secondary or backburner level. So I don't want to underplay that. There have been important steps. For instance, with allies, Japan increasing defense spending, posture moves, et cetera. The Pentagon is consistent that its forced development over time is focused on China, but that's distinctly secondary. And clearly the political level in the United States is focused on Europe. I mean, the administration's formal documents say that they're prioritizing Asia, but I mean, President Biden went to Kiev the other day and said part of his heart was in Kiev. So I mean, I think we don't have to speculate. And it's more than just political attention. I mean, there's been a lot of things. The way I would describe it, Marshall, is there's a lot of sense that there has been an awakening to the danger of great power war, geopolitical competition, et cetera. But those things, the fixes to those things have not gone through the formality of happening yet. So actually the situation is worse now. So for example, the defense industrial base, there's a lot of attention to the defense industrial base. That's important,

but it's equivalent in a sense to like saying that you have a drinking problem. Okay, you have a drinking problem, but are you actually going to kick it? Right? I mean, actually, Dave Norquist, the former acting secretary of defense, pointed out recently in House testimony that the situation is actually deteriorated. Moreover, the war, I mean, a month ago, this was still a somewhat heterodox view. Now it seems to have definitively become the conventional wisdom that this war is likely to go on for a long time. Frankly, even if it ceases, even if the Ukrainians achieve a decisive victory, which I hope for, the Russians are not going to go away, are very unlikely to go away. So this problem is not going to go away. And so my basic kind of bottom line is we are not going to be able to sort of wiggle our way out of the necessity of choice. And I believe our stated national priority on China and focusing on Taiwan is correct, but we are not actually going through it. And so I analogize the situation today to continue, let's continue with like the, you know, the medical issue is like we know, you know, like we've gotten acute heart disease diagnosis, we know we have to lose weight. We think we're on a diet, but that diet is not really the one that we need to lose a lot of weight. And that is so it's actually a very difficult situation rhetorically or political politically that I often find myself in, because people don't contest that China should be the priority directly. They don't contest that Taiwan, we should do more for Taiwan. But, but they try to like make sort of indirect secondary tend to sort of triple bank shot arguments that obviously don't help the situation in Asia. And that's it's harder to sort of negotiate how to how to rectify the situation now.
Yeah, there's a million things I want to get more doubled down on. So a to your point about the commitment to Asia, President Biden goes to Kiev and he says his heart is in that city. Obviously, as you know, as most people know, he can't do the equivalent and Taiwan on 15 different levels. So let's make it explicit. What would a tangible from your perspective as an outsider commitment look like beyond just the superficial because what's funny is he can't even make the superficial move. There is no equivalent of going to Berlin and giving you know, a Kennedy speech.
So what would that look like tangibly to you? Well, he could he could go to Tokyo or he could go to Okinawa or he could I mean, you can't go to Taiwan, but there's plenty of things he could do. I mean, moreover, the political symbolism by the by the way, the president sort of offhandedly said like four times now that we're going to defend Taiwan.
Look, I don't want to I mean, I think this is a very important point that the president clearly prioritizes Europe. No question in my mind. I think it's visible to everybody. But that's not that's not the whole totality of the problem. We could have spent $112 billion fixing our defense posture in the Pacific, which is not adequate. I mean, and if you listen to what the Indo-Paycom commander is saying, the senior military officials, defense experts, etc. It's clear that we're not where we want to be. And of course, you know, meantime, it's not another thing that's become conventional wisdom that was a quote unquote fringe or marginal view a couple of years ago is that like China wants to have the ability to take over Taiwan by 2027. Like just to be clear, I don't make predictions. I don't think it's inevitable. Like people sometimes put this on. I'm not saying that I don't I don't know when I have no idea what Xi Jinping is going to do. But what I do know is they're undertaking a massive, unpressing historical military buildup specifically, clearly, very clearly designed to take on the United States. And secondly, he specifically said that he wants the ability to take over Taiwan. Not only is this like some tea read leaving reading the tea leaves, Bill Burns, the CIA director is considered very sober understated guy. He said the other day that US intelligence indicates that China and Xi Jinping

has given the order to be ready by 2027 doesn't mean it's going to happen. But like, I mean, seriously, like, I can't believe I actually have to make this argument. I mean, if somebody's like, Hey, your car is mine. And like, I should have it. And like, he's casing your house. You know, he doesn't you don't, you know, that's all you need to know, right? So that's the reality. I mean, it's, there's a lot of sort of overbroke sort of arguments about, well, the fate of Taiwan is going to be settled in Ukraine, largely tendentious. It's pretty simple. It needs money. It needs political prioritization. It needs effort. It needs focus, etc. By the way, I'm not in favor of like recognizing Taiwan independence. I'm not in favor of provoking the Chinese action. I'm quite worried about that. I'm not I was against, I thought it was a bad idea for Speaker Pelosi to go to Taiwan, for instance. But like, you know, let's, let's hit the gym really and not just talk out of both sides of our mouth. You know, when you are, I just want to do a quick call out to your part about not making predictions. I was reading some of your Wall Street Journal writing, and you make a great habit of not making those predictions. So for folks, thank you, your archives, like your, your, your piece on the industrial base from last July has aged well because you're just describing the situation and you're not saying X, Y and Z thing. I think a lot of folks. And if I do, I'd welcome people calling me out. I was actually going back and forth. If I have made overconfident predictions, I'd love to be notified and I will, I will correct them because I don't have a crystal ball. So I think the next question basically would be, I'm curious how just thinking about American history, because I think that thing in the back of everyone's mind, I think one of the books back here is Arthur Herman's book about American business in World War II and reindustrialization. There's, I think in the back of the mind, the backstop for someone who's directionally center left pro Taiwan is, look, we always struggle. There will be a ramp up. America has the industrial capacity. These are some of the comments actually on that Wall Street Journal piece. So what is your, what is your response to that? Wrong. It is our historical background. It's just wrong. In fact, Robert Kagan made what I think is like a tremendously self-describing error along these lines in a huge Wall Street Journal piece. I can't, I mean, I went back and forth and it didn't correct it, but it was so revealing because obviously Kagan is sort of like the spokesman of the sort of epicenter of the blob. And to make such an error was so revealing about this, this exactly your point, Marshall, that this is like, one, one quick thing. I want to call it for folks. Robert was on the show last month. So if you want to listen to that after you hear bridge say, I think this is the one podcast. It's featured the two of you. That's great. I love it. So yeah. Excellent. Sorry. Go on. Now with those comments. Congrats to you, Marshall. That's, that's awesome. You know, I think you're exactly right. It's just factually wrong. I mean, first of all, in economic scale, China's roughly equivalent to the American economy. If you use market exchange, which tends to over probably state the importance of the dollar, which props up the size of our economy, we still are larger. We may, it's possible we may always be larger than Chinese, but we're in the same order of magnitude. If you use purchasing power parity, which is more relevant
to military and strategic affairs, because it has to do with things that are produced domestically, for instance, at lower labor costs, the Chinese are way above us already or they're above us already and they're heading to higher as they, as they move up the value chain and so forth. So we, this is the thing Kagan got wrong. We, the United American economy alone was larger than the three axis, major axis powers. And we were alive with the British empire in the Soviet

we were always far larger than the Soviet economy, which would probably overstated its size. We're larger than imperial Germany. So, so we have not been in a situation where we are not clearly the largest economy in like 150 years. Moreover, this is even worse than Matt Stoller points us out. We probably overstate, especially in a kind of military context, the, our economic advantage is because we're largely a service economy now. The Chinese have the largest, they are the industrial, they are America in 1941. That's the problem.
Right. And, and like, this is the thing that Elon Musk tweeted of my thing, which is that the Chinese have 13 naval shipyards, I think, and we have four, but one of their shipyards is larger than all four of ours. So like, who are we kidding that we can walk in Shugum at the same time? It's surreal that we think that this is a realistic approach to, and I'm not even like, I'm not one of these people who thinks that the Chinese are a bunch of communists who are going to brainwash us, whatever. I mean, Xi Jinping is a communist, but like, I'm not worried that much about like them, you know, polluting our bodily essence or whatever it is from Dr. Strangel. You know, that I'm just like, whoa, like, shouldn't we be taking these people at value, like seriously? And I think that's, that's a huge part of the, of the problem. And that gets to the big problem, which is people are like, Hey, we've woken up. And it's like, yeah, but like, we haven't fixed the problem at all. In fact, orders are slower than ever. And by the way, there's a huge number of orders for the Europeans and the Ukrainians and stuff with the defense industrial base that's like a bow constrictor, like, you know, digesting something. So we're in bad shape. I mean, it's not unsalvageable. We can do it if we put our minds to it. But it's, it's, we need to recognize the seriousness of the problem.
I think the thing that's interesting here, that is that to some degree, we are constrained. And you're telling by the World War II metaphor, because the World War II metaphor, in almost every aspect is positive to us. So you're going to have a horrific end of 1941, you're going to have some really tough slogs in 1942. But ultimately, by 1943, 1944, 1945, momentum, inherent strengths, that defense based potential, could you just really give the audience a strong picture of the implication of China being us in 1941? Because I haven't heard it quite articulated that way. Like, what does that mean? As we think of a geo strategic or even like military conflict competition? Because we've never had that before. I think that's your underlying point.
Right. So just the the scale of the American military buildup in and by the way it supplied the British and the Soviets to some degree, the Soviets also supplied a lot of their own equipment. With nor I mean, just the scale of the production, I mean, tens of thousands of aircraft, I think we had like, depending on how you define it, like, I mean, maybe like 20 main battle carriers, but like up to 100, like escort, if you include that, I mean, hundreds, well over 1000 ships, I believe, et cetera, you know, weapons, blah, blah, blah. And like, I mean, my one example is like, we had a specialized ice cream ship that was there for the the naval and marine for an army forces in the Pacific for instance, just to give you a sense of the scale. The other thing we had was a Soviet Union that whether, you know, we like them or not, I certainly don't didn't it is was willing to bear and to bear the brunt of the fighting. I mean, there was 20 to 25 million, maybe more Soviet citizens died in that conflict. United States lost about half a million. You know, obviously an enormous tragedy for everybody, but like that that was a very different situation. Now, I'm not compare, I mean, the one to one comparison of World War II and God forbid a conflict with China is, you know, it breaks down. But I just think we need to really understand what what the what the what the what the scale differences are and how bad of a situation we're

in, you know, vis-a-vis China. You know, and this is where the predictions dynamic becomes difficult. And once again, I'm not asking you for a prediction, but I'm asking you to think of two different scenarios. So it seems to me that if scenario one is a short, quick, I don't mean short or quick in the like, I mean, this is like the, you know, kind of like anecdotal sense, a sharp conflict with China over Taiwan. So this is where a lot of the war games talk about like it goes on for a few weeks, it goes on for a month. That seems to be that seems to me to be the type of conflict where the structural weaknesses in our economy matter a little less. So it's a problem, but that's a dynamic versus a longer protracted conflict. This is the point about how there's a version of the war in Ukraine that goes until June. There's the version that we seem to be going to now, which is we're almost everyone to your point, noticing the vibe shift is saying it's going to be a longer term conflict. How do you think about those two different scenarios, short, sharp conflict versus extended protracted one? Let me address the Ukraine part first, because I think this is really important, Marshall. I want to put a fine point on it. There are a lot of people talking about it, quick end of the war, that if we increase arm support to the Ukrainians, that the war can be concluded quickly on favorable grounds. First of all, I'm not necessarily against providing more equipment, you know, from an escalatory point of view. I do think the threat of Russian nuclear escalation is real. So we should take it very seriously and actually give the administration credit on that. But I'm not like, for instance, my rule of thumb is if the Soviets supplied some of the North Vietnamese, then we should be prepared to give it to the Ukrainians. So that would lead me to be open to F-16s. I'm not against it. My concern is the trade-off. Here's the question I have for Hawks. What if the quick war fails or if there is a quick war and Russia doesn't go away? This is what I don't get. I have not actually seen a serious address of this. So Hawks are criticizing the Biden administration for being incremental and so forth, and there's points to be made on that. But they're also hawkish on Taiwan and China. And we know we don't have the industrial base. We know we don't have, and by the way, there's not a huge appetite in the country for dramatic increases in defense spending. Maybe we'll get 3% to 5%. That's very important. But we're not going to double the defense spending. It's from what I can tell. I mean, not even Republicans are unified on that point. So how do you address that point? I mean, one of the things I try to do is what I'm laying out is a strategy, kind of a strategic framework. It's not a particular play-by-play, but a strategic framework for how we address the various challenges to U.S. national interests. Mine is make sure you take care of the primary threat. Don't mess around. Don't cut it close. Get that right. Meet a denial of defense standard. And then mitigate what you have left after you've done that basically. I mean, not necessarily sequentially, but just kind of in priority terms. That's where you can be available for Europe. That is going to be less so the Europeans need to step up to take primary support of the Ukrainians. That's feasible because of the Ukrainian income. The hawk view is we're just going to win, and Russia's going to be cowed in the corner. And then we're going to shift to Asia, even though we know that Asia is not in good shape. I mean, the hawks are serious about that point. So I just like, I don't get it. And I don't think, I mean, in this situation, in which we're possibly in the most dangerous period, certainly since the Cold War, in some ways, since the Second World War itself, I mean, there's an outright major war on the European continent. I think we need to be serious. Like we really need to grapple. You know, if people, like I get that people might say, Hey, Brett, you're over focused on Taiwan and Asia, but then say that. Say like, no, no, no, maybe like I'd respected a lot more people were like, you know what, Taiwan's indefensible. It's not worth it. I'd rather take Ukraine consolidate the position of, I think that's in the back of the mind of some of the people, you know, behind the decision making the Biden administration, actually, I think the back of their mind, they're prepared to lose Taiwan is my guess, because otherwise it doesn't, it's, it's kind of a bluff. But I think like, I think it's incumbent upon hawks to make a serious strategic argument about this point, reckoning with the reality that they know. I mean, the point I would, I like to hammer on is for the last 10 to 12 years, the hawks have been saying, we've not been spending enough on defense. I mean, they are very articulate and eloquent about the impact of sequestration, which was very real on the defense department. Okay. So that presumably had some impact, right? Like, well, not presumably, like it definitely had a huge impact. Now we're living in that world. How do we deal with it? That's the, that's the real question. In terms of China and Taiwan, you're absolutely right, Marshall. So we have to expect a war if it breaks out, God forbid, to be a protracted and attrition, a protracted one with China, because China will rightly understand that it has advantages. It's possible it doesn't happen. But again, we don't make predictions. But if it seems to be in their interest for, for a war to go on, we should assume that that's the case. That is to say, unless they win quickly over Taiwan, in which case, they might just want to wrap the thing up, tie it in a bow and then move on and, you know, rinse and repeat kind of thing. So I think the, the, the short war is critical because if we don't defeat a Chinese attack on Taiwan, we're in a far worse position in the same way that, like in World War II, it made a huge difference that France fell, but the war didn't end. To your point, to flip, right? We, we, the Western allies benefited from a long war relative to the alternative, but it would have been better if France had held on. So in the same way, we've got to win the short war. Otherwise, we're going to be in a very, a very tough position. I mean, the other thing is if we hold Taiwan, their industrial capacity is a lot larger, but it's, and I go into this in my book, it's going to be hard for them to find ways to apply that greater industrial capacity. It doesn't mean it's easily addressed, but I think we'll be in a much better position to do so. You know, there's actually a third scenario that I should have brought up in terms of the possibilities you have to prepare for. What about the possibility of like the blockade? Just the idea that they say to themselves, look, we're good or for ill, the war in Ukraine has proved that you can't just make these big moves assuming it's going to work. So instead, blockade, call the US bluff, it's far different to attack than to defend in that sense. What do you think about the blockade situation? Yeah, I don't. I actually think there were, the, the, the lesson is actually the reverse and some of what Burns has said indicates this is a few months ago that he agrees. By Burns, you mean the CIA director? CIA director. So, so one is blockade is not a great strategy for China. So actually, if they try it, I actually think that might, might not be the worst thing for us. I mean, I'm not hoping for it, but like it's better than the alternative because the way a blockade works is it imposes such horrible costs on the targeted population that they give up. So people basically starving and dying in the streets and people losing medical care because power goes off. That's, that's going to put China in a bad, bad situation. And it tends not to work when countries are talking about their, their fundamental independence. I mean, small eye here in the case of Taiwan, their autonomy. In fact, it's, I actually don't think there is an example of a country using blockade to, to force another country's capitulation. It's often part of that, like in the Civil War, World War I or something like that, but it's not the main kill mechanism. Largely because countries directly attack when they have the ability to mount a blockade because it's much more effective. Quick question. Isn't the fact that Taiwan is an island making, this is an island. Yes. So let me get to that. It's an island. It's more vulnerable. Right. So like in World War II, the Germans obviously, initially they tried direct attack. That was the battle of Britain was the setup for that. And then they decided not to do it, but then they did the U-boat campaign. Well, you know, which could have worked. It's not impossible.

The problem there is yes, Taiwan's an island, but this is going to set up and there's two points. One is it doesn't, it prompts the U.S. and they lose the element of surprise. One is it, that would be a belligerent act. It would put U.S. credibility and so forth on a line with respect to Taiwan. Okay. The U.S. is the U.S. going to break the blockade? I think we absolutely have to. Like, I mean, we're totally unreliable if you don't do that. So essentially what the U.S. does is some, this is, this would not be easy, but it is manageable. You know, the U.S. flag tankers in the Iran-Rock War era and so forth. This is something that has happened many times in history. We would just essentially challenge and break the blockade. And I think China, hopefully that it was China that shot first. So we would seem like the defending party, which would catalyze U.S. and ally resolve. Here's the problem. If that happens, the United States is going to be generated and ready for a conflict to escalate. And so China would lose the element of surprise. And the problem with that is that for a direct attack, if China wanted to escalate from that point, surprise is very, very important because if you're launching an amphibious invasion, you definitely want as much surprise as you, as you can get. And surprise is not quite the technically right word. It's more like movement without generating a response. We may see it as long as it doesn't catalyze a political military response. And the thing is the lesson of the Ukraine war is in that it can't be done. It can definitely be done. You just got to do it right. I think the lesson of the Ukraine war is the Russians screwed up big time. They didn't, you know, I mean, the way I put it is if you were thinking of sending two missiles, send six. If you're thinking of somebody who's going to defect, kill them. If you were thinking of dropping 10,000 guys, drop 25,000 guys, you know, that sort of thing, like leave nothing to chance. I mean, we took over a rock in 2003. It's definitely doable. It's just, you know, I think in the case of, of the Ukraine war, the Russians probably overstated, overestimated their own capability and underestimated the Ukrainians. It's possible we're underestimating the Chinese and an overestimate the Taiwanese. It's possible you got about right. But if, if that means if I were a Chinese planner, I would just say let's, let's pad a lot more certainty into our calculations. And that's what I think Burns, for instance, was talking about the other day or yesterday on CBS about how China might not quite be confident yet because, you know, you're not, if you're China, you're not going to do this if you don't think you're going to be successful. And that's what we have going for us is it's a tough thing to do. And there's a lot of risk for China. And if Xi Jinping fails, it's very bad for him. So even if, say, China is like 51% confident, that might not be enough. I mean, if I were China, I wouldn't do with 51% confidence. I'd want to be more like 80% confident. Yeah. And the thing too, a couple, couple responses. So number one, the, another clear lesson of the Ukraine war is just the, the political side. So when you were talking about how a cost of the blockade is people are starving,

people are dying, it's barbaric, frankly, in terms of what it would actually reflect upon China's actions in the, you know, case of social media, which is, which drives the American political response. Right. I think so. I think that the if the Russians could go back in time, them allowing Bukha and like other like incidents entirely changed the dynamic. So it's one thing to invade. And it's just actually, yes, but if you just have weeks and weeks and weeks of starving Taiwanese people, terrible, it's the demand in allied government and allied countries for intervention attack is just going to be really heightened. So I really wanted to emphasize that point. Yeah, exactly. That's a great point. Exactly. I think I think I think another question, and this is another lesson of the Ukraine war, which is this just the salience of national identity and willingness to fight. So if we're going to contrast, let's say the fall of Afghanistan to the Taliban with the fall of Ukraine, Afghan national identity overstated in terms of willingness to like fight this, this or that identification with the status quo government, whatever, Ukraine, the Russians make the opposite mistake, assuming that Ukrainian national identity,
but also just loyalty to the government was much lower than it was. How does that? How do you think
about that dynamic in Taiwan and the degree to which the Chinese are probably because if once again, if I'm a Chinese planner, I'm thinking, okay, open arms, or is this another resistant situation? Yeah, hard to know. You know, you hear different things about the Taiwanese that they they don't I mean, they clearly don't want to fall under Chinese, you know, communist control. The question is how, how resolute are they? I think if I were a Chinese planner and therefore how I'm thinking about it from our perspective is I wouldn't take any chances. I wouldn't expect to be open with welcome with open arms. And I don't think the Chinese do. I mean, because if you see the way they talk about splittest and independence separate, I mean, political warfare kind of stuff, I don't think they have delusions that the Taiwanese, you know, I'm sure there's some on Taiwan who would and including some in important positions possibly. But I don't think it's, you know, and I think that's clearly a lesson of this conflict for China is like, don't, don't bet on that. And, and, you know, don't take any chances. You're not, you know, pulling the Russian movement packing your dress uniforms for the, you know, march through Kiev and in this scenario. I mean, we made that mistake too, right? I mean, they will welcome us as liberators and that kind of stuff. So it's not impossible to Chinese make the mistake. My general point is, it's possible to Chinese make them make mistakes. If they make a mistake, it will be, they'll be easier to handle. So we should assume that they won't make mistakes or, you know, macro mistakes. So before I pivot off of this broad topic, I just want to really pick up a metaphor that I really I'm serious. I really, I really enjoy this metaphor because it's going to help me think through the administration discourse on this topic, which is everyone to your point says we're alcoholics. That's the generic line. But there's a difference between saying, and look, it isn't an accomplishment to admit you're an alcoholic. Yeah, it is. No, it's a critical. It's a critical. It's the first step. It's critical. The first step with the follow up question. If it's your family, your friends, your employer is okay, like what now? So the broad consensus is we're alcoholics. What is your, I don't want to say alternative path because it's all, I think it's things are pretty up for grabs, especially given the now conventional acknowledgement of a long-term Ukraine war. I think that acknowledgement is actually deeply important in terms of how we're thinking about this because if you can't, if you can't say this is a six, eight month thing,

it has to change how you think about this. What is the bridge Colby 12 step program
if we're accepting or maybe pick a different program?
Well, I think it works. Yeah.
That's a great, I mean, actually the, the metaphor carries. It's like, I have this metaphor about Taiwan as a man in the water with a shark that I love, but, but, but I think it carries.
You can't, you can't, you can't, you can't drop that and not give me the metaphor of the shark.
Okay. So the metaphor of the shark, I'll try to be brief and it really works in my view.
The Taiwanese don't love it, but it's, it really works as like Taiwan is a man with a cut. I was in the water last spring with my wife and we got a cold end because there was a shark and I couldn't see the shark in the water. The lifeguard could see the shark. We couldn't see the shark even though we were closer to it. Pull this out. Here's how it goes. Taiwan, a man with a cut in the water. There's a great, there's America is a man in a boat and is saying, there's a great white shark in the water. Taiwan swim over here. I'm not going to jump in the water because I, you know, we're friends, but I got a family like, sorry, you're not like the most important thing in my world, but I will stick my hand and risk my hand getting bitten off to help you, but you've got to swim and Taiwan is the way, like to me, the way you can explain a lot of what's like at a human level, what's happening in Taiwan is they're kind of paralyzed, right? I mean, they are doing some things, but not clearly not in the right order of magnitude given a scale of threat is like, if you're a man in the water and someone's telling you there's a great white shark and you need to swim, well, are you sure he's right? Maybe he's wrong, right? But even more to the point, if I start swimming, that is building up, getting more serious, maybe, you know, kicking in the water provokes sharks. You know, there's this huge shark out there. It's faster than I am to get to the boat. I'm going to get eaten, you know? So like, that's sort of another thing.
And so it's like, and then maybe you're thinking like, maybe it's not a great white shark, maybe it's like, you know, it's like a reef shark, you know, so I'll get bit, but like, I don't need to worry about it. Maybe the PLA is not so strong. Anyway, so I think that metaphor actually kind of works, right? And the other thing about it is like, America's in the boat, we can see the size of the shark. And actually, because like our overhead, our intelligence apparatus is much better than Taiwan's Taiwan has better kind of finger feel of China and China's culture. Like they, they help, I think they dealt with COVID a lot better. They shut down Taiwan much before America shut down like months, I think, if I'm not mistaken. So they have a better sense of like China at like the kind of regular level. But like, we're talking here, we're not talking about what people in like Guangdong think, we're talking about what the leadership is doing with the PLA is doing that is you're better off with like the big. So anyway, that's my, that's my metaphor.
Yeah. And real quick, I accept the metaphor as a non-Taiwanese person. But I think the other thing that the metaphor gets at is just, and maybe you said this, but the status quote is working. You're, you're swimming, you're swimming with your family. It's because there was a, I just, I was thinking of this because I saw you kind of tweet quote, they tweeted quote, only 5% of Taiwanese people want independence. America stopped forcing is one of the like way too hard on the
pay. Why are you bringing up the shark? Yeah. And it's just like another way of restating the 5% point is they like the status quo. They don't want to declare, no, we're, you and I are not advocating for the Taiwanese to say, no, forget, you know, you know, the current like most Taiwanese

people into your metaphor are swimming and it's nice and it's a nice day. Right. In fact, my view is like, don't like punch the shark, don't like swim over by the shark and like poke it in the eye. That's a bad idea. Like get out of the water. That's your first thing. You know, don't declare independence. Don't do like unnecessarily provocative things. Like don't unnecessarily slash around, like kind of calmly try to get to the boat. That's like, actually that, that's a great point. I think you just refined the metaphor.
No, I'm glad we did the tangent, but yeah, back to, back to your original point.
So, so the 12 step problem is great because actually, I mean, look, the 12 step program is actually the metaphor works here as well. It's pretty straightforward. I actually don't know offhand what the, what the 12 steps are, but like, you know, I think they're pretty well established, you know, AA or whatever, you know, discipline, prayer, I think, you know, if you're a believer, et cetera is, and so it's like, like, like we don't have to over complicate what we need in the Pacific is we need military investment. We need a sense of urgency. We need to put pressure on the Asian partners and allies to do, do more. We need to be ready. We need, we need like, you know, we need to paper over in the near term as Mike Gallagher points out, like the anti-Navy, we need to shift resources. It's like, that stuff is actually, we kind of like know a lot of it. I mean, some of it is complicated, a lot of it's complicated time technically, but like at the macro level, it's not that complicated. The problem where we are is like, you know, we're saying that we have the drinking problem, but we're not really, it's like a drug addiction where people are like, yeah, I need to get over this, but like you keep doing it. And how do you, how do you get a person psychologically to change that? That's a lot of what I'm wrestling with now is like, you know, we've, we've admitted that we have the problem, but we're not, we're not actually following through. And that's a really hard, and maybe, maybe, I guess, I guess my logic to continue the metaphor is like an intervention and like, here's what we look like, you know, like here, hey, Bob, here's what it looks like when you get really drunk. And, and do you want this? This is, you know, your family, blah, blah, blah, you know what I mean? Like that, that's sort of my, I guess my, I guess there are other approaches to dealing with someone in that situation, but mine's like the cold light of day. Here's, here's the reality. And if we grapple with reality, we'll be more incentivized and, and likely to, to shift focus as we need to.
My final double down on the 12 step program metaphor, because like you, I actually don't, I can't actually name out the 12 steps, but one of the steps that I, that I do know, because I think the metaphor is important is the, you know, accepting a higher power idea, kind of separating it from purely like accepting like God or Jesus or whatever and treating it as acknowledging some like inconvenient fact. In this case, there's something like great even yours for something convenient, like what, what is the, what is something inconvenient that we're going to accept about this 12 step program? Because honestly, exactly. If you look, if you're, if I'm a, if I'm in the Biden admin and I'm like, you know, the equivalent of you hearing that actually my plans aren't working and things aren't as great as they are, like I wouldn't, that's not, that sucks. But I don't think that's, that's, that's not that insurmountable. Do you think there's like a deeper, you know what, you know what this probably is? I think my version of that for you would be that the, the deep truth that we don't want to accept is that China is the equivalent of 1941 America. That entirely blows up my entire frame of the world. Right. And I see, I think you see this on both sides actually. In fact,

in some ways more on the Republican side, which is its acceptance that we are not like the unipole. And I think, I think the political leadership in a lot of, in a lot of Washington and including on the Republican side is really wedded to the idea that we are, you know, the indispensable nation, I mean, we are kind of indispensable instrumentally in various places, but like reckoning that China is like a peer is such a change that like we, I mean, and this is the critique that the Chinese make of us. I don't think it actually is true with respect to my argument, but I think it is true to some extent with respect to official Washington and like blobby Washington, which is you can't accept not being totally number one. Because in a sense, my argument is like, I mean, we're, we're tied for number one. Like, so let's, let's, let's make sure we're kind of edging out as number, you know, number one doesn't really matter. Like, it just matters whether Americans are free, prosperous and secure. But realistically, we kind of have to be up there given anyway. But, but I think that's, that's the, so when I, when I try to get like the earth things, it's this hubris about America and this unwillingness, and it's reflected in the walk and shoe gum thing. That's why I go just to hammer on that all the time is because it's so explain the, explain the, explain the debate you're speaking about. Yeah. So, so whenever like John Kirby or one of these people is asked about what are we doing in Asia, he says the US can walk and shoe gum at the same time. And it's just speak, you know, do you take another metaphor? It's so revealing because it's like, what is walking, you know, you're having another street and you're just like chewing gum. Like that's easy. Like, and four year olds. Thank you for putting it that way. Cause I've actually never, you're right. That's actually a very easy thing. Yeah. Well, I'm like, I'm always like, well, how about wrestling a dragon and sprinting marathon? Like that, that would be like kind of, whoa. Okay. That, oh, sorry. Okay. That's really pretty hard. Like, okay. Now I see what you're talking about. That would be, I would actually, I would, I think that would be much more accurate, you know, because like, you know, we're not like just like, is China the walking or the chewing gum? Like, no, no, no. Right. And nobody in like, the thing about walking and shoe gum, no successful business is like, Hey, we can walk and shoe gum at the same time. Like it's obvious. I mean, I'm not a successful businessman, but like it's obvious successful businesses pick their priorities very carefully and go after them like Apple and the iPhone. I mean, again, I'm not an expert, but like stretching basic, it's basic, right? And it's just so revealing. And, and the fact that the Democrats and the Republicans, a lot of them, the sort of traditional ones just like completely sign on to that is so revealing about where the mindset is. And it's just, it's really not accurate. And if you talk to commercial people, they're obviously Asia and China is the world's biggest market, you know, and so there's like this real disconnect that I think a lot of it is explained by age. Honestly, I think to me, you know, the way I think about it is like a lot of people in Washington still think the Chinese are riding around on bicycles and wearing masks. It's, you know, there's a picture of somebody put on Twitter of like the change in Shanghai from over the last 20 or 30 years. And it's like, that's just there's probably well over 100 cities like that in China, probably maybe like into the several hundreds, you know, just the scale of what's happening. And people are like, yeah, we can shoot down. Like that's easy. No problem. No, wrong. So two last big things. So number one, I wonder, I do a lot of like thinking around the like post like neoliberalism space. And this podcast is funded by the Hewitt Foundation, which is like center left. So, you know, think you are this, but they tend not to be as focused on the foreign policy aspect. I wonder if some of the reluctance on the GOP slash conservative side

to take some of your arguments seriously, is it really puts you in an awkward place?
Because there seems to be a degree of government needs to do X, there needs to be energy here.
Because I think I think this I think the center left to left version is like,
we just don't think about these issues. So that explains some of the difficulty there.
But I think on the right side, I think there's something a little too FDR about this industrial
based discourse. Maybe I'm wrong. I'm just kind of like, I'm curious. No, no. Well,
well, China is so critical to the whole neoliberal thing. And I'm going to I have my own sympathies
like I'm sort of my own personal sympathies are more new righty, as I think you know, but
I want to hear just be really like clinical about it and try to try to abstract from those
personal preferences, because I think your point is exactly right. And objectively so
China is critical to the whole and China the whole China base critical to the whole
neoliberal versus industrial policy and so forth and right and left or whatever kind of debate,
because China is the huge market that is the symbiotic relationship for the financialization
and servicization of the American economy, right? We off deliberately, knowingly offshored
a huge amount of that. And the basic neoliberal argument on the right, this sort of neoclassical
economics was that like basically two points and the second one is not emphasized enough.
One is that China would liberalize. Okay, maybe. Secondly, more importantly, and this is the
critical claim is that we would outcompete them anyway. And that is the one that's been that's
been wrong. That is the one that's been wrong. The Chinese have not just like they don't much
to make toy cars and whatever they are ascending the value chain through massive industrial
policy. So my view is that like whatever one thinks of industrial or like state intervention
economy in like a vacuum, and they're useful and important debates about that.
What has been I think conclusively demonstrated to be untrue is that we cannot do state
intervention
in the economy and have a massive Jupiter sized economy also doing industrial policy and succeed.
So like whatever you think, like you might be a Milton Friedman guy in the vacuum, but I think
you have to recognize that in the face of massive industrial policy by the world's other largest
economy, we also need to be, we can't be like fighting with both hands tied behind our back.
And that is very difficult. And it's also connects to Kui Bono, who benefited in this
globalization economy. And I don't want to get too moralistic about it, you know,
personally, but like, but just like it's connected to obviously Wall Street, Hollywood,
et cetera, consulting firms, et cetera, that benefit from this Chimerica kind of model.
And when you're breaking that apart, and by the way, I'm not, I don't think full scale decoupling
is necessary for instance, I can get into, but I think that it's touching on real and that's part
of the thing I think that's going on. Also, we love to lambaste the Germans and nobody loves
to lambaste the Germans more than I do, but about, and you mean like status quo 2023 Germans,
not
not the Nazis or like the Kaiser, I mean, of course, hopefully we're all right. But I mean,
like today, but like, for being enmeshed with the Russians and the difficulty they have in
enmeshing themselves, this is a huge hypocrisy on our part. Huge. We are deeply enmeshed with a
country that is 10 times the economic size. And by the way, the Indians point this out,
which I appreciate to our face. We built up China and we are the ones who are having difficulty
enmeshing. And people are like, are really enmeshed, right? I mean, obviously, there's Tim Cook and
all these things, but like the most powerful people in our society are deeply enmeshed in China. And

we have the audacity to lecture the Germans on this point. So it's easy for us to, here's the thing. It's kind of easier for us to have the Russians as the, the, the bet noir, you know, or the, or the bad guy, because like we're not really exposed. It doesn't involve any significant changes, but it's much less consequential. Whereas China is like, that's real for us. But yes, it's real for us. That's why we need to take it seriously. And like my view is like, all right, if you had, if you invested and you were big on China, you know, in the past, okay, like nobody's perfect, like I'm not perfect, like whatever, I certainly don't claim that. But it's like, don't do the Hank Paulson, you know, that's like kind of shameful, like don't double down like that. I mean, that and seriously, at least like recognize this is where things are, we need to move forward. And that's I think a big, a big, a big, a big part of the explanation why it's been so difficult is because it isn't, it's, it is consequential in the sense we are analogous to the situation with the Germans and Russia. So, you know, since you brought up the decoupling debate, I'll note that I think Friday's episode is going to be with Vivek Ramaswamy, who one of his planks is a complete decoupling with China. I don't need you to argue with a guest who's not here. But I think I'll just kind of express a concern I have, which is that on the right side of the aisle, where in this, because the right has basically, because large parts of like the dissident insurgent right have really harshly pushed back against like, let's say like the bipartisan Ukraine consensus. I think some people are over escalating in the opposite direction on Taiwan. So, but kind of by like, but so basically say, look, like, you know, Ukraine, it's not the big thing, but actually China is the whole thing. So we need to completely decouple or we need to endorse Taiwanese independence. It seems like we've, and something you've done in this episode very well, as you said, okay, here's my personal opinion. Let me step back and be analytical. I don't get the sense that a lot of our GOP, well, not ours, I don't want to identify as a member of the GOP, but like a lot of the GOP's conversation about China policy has left the realm of analysis and analytics and risk. They're kind of doing their own version of what they claim the central left is doing in Ukraine. So can you just offer some just like, how should the GOP who has not seriously thought about this issue until recently, how should they ground themselves and think about it? Because my final question, by the way, is going to be about the 20th anniversary of the Iraq war, which is like the perfect example of what happens when you over escalate, don't think deeply about things, body, body, body. Well, thanks. No, I actually, I mean, certainly in the sense that we shouldn't over escalate in the other direction, I fully agree. And that's why I like, I really try to stick to my line. And for instance, like, I'm not, I don't think the Russians are the good guys. I think the Ukrainians are totally just in their defense. And I sympathize with them. It's not about that. Like I'm trying to say, what is in the American people's interests? Let's do that thing based on a practical read of what resources are available or realistically going to be available. And so in the case of Ukraine, that means we cannot do the level that we have been doing. We just, I just don't, I don't think it's tenable under current circumstances. Likewise with Taiwan and China, we don't need to go, there's a line from a movie that's not, it's not a very nice one. But anyway, I sort of like, we can't go full out there, you know, we don't need to, we need to know. Oh my gosh, that was a Tropic Thunder reference. People could figure it out. I didn't say it, but we, we, you know, in part because of the scale of the things that I was just talking about, it's going to be really, really painful to deal with China. So let's not overdo it both because I mean, I think people understand that I genuinely want to avoid a war. I mean, that is

the whole point here. Like, but on the other hand, if a war comes, we need to be able to win it because that alternative is worse. And the best way to be prepared for a war and to deter it is to, excuse me, is to be, is to deter it and keep your, keep your demands at a level that's consistent with what the other side can with dignity accept or like sufficient dignity accept.
And I think that the, the, the decoupling being the way I think about it, and a lot of my friends are in favor of full scale decoupling. My point is here's what we need to deal with China. If people want full scale decoupling for other reasons or to go beyond that, I think that's a worthwhile, very worthwhile conversation to have. But I really think we are tending to overthink the dealing with China problem, which is like, if we can keep the military balance sufficient, they are not going to be able to impose their will on other countries in Asia. I think it's that simple. And the good news about that is it means we don't have to totally overhaul economy. So maybe, you know, Hank Paulson is wrong or Bob Zellick, but on the other hand, we don't need to go full status to either. And I think this is also, you know, the left tends to frame it in sort of racial terms or, you know, but, but I also think, you know, I mean, those are legitimate. I, I oppose anti Asian discrimination or hostility of any kind. But like, you know, it's also, we don't need to like overhaul our society to deal with like misinformation and disinformation and whatever those like, we don't need to like root out every form of Chinese influence. There's going to be Chinese influence. If we get the military balance right, we can afford to trade a lot with the Chinese. You just got to be prepared for that to go, to go away. I mean, McDonald's and others are apparently reinvesting in China. Okay. But don't expect the American people to bail you out. And if, and if I were, had a position of influence in that context, I would not bail them out. You know, that was your decision you took on the risk. But that's up to you. Okay. But, you know, we can afford it as long as we can sink their fleet. I think that's a very important, I think it's a conservative point because it's sort of like the war is the health of the state aspect where like, there is a danger that, I mean, you know, this is kind of a canard often, but like the McCarthy era, but he's McCarthy, is a danger. Like if we over, if we overtake it, and I actually think the left is more affected by this on the Russia stuff now, I mean, they've let the Putin mania and Putin's an evil guy, like he's an enemy of the United States, but like he's not, you know, he's not like Satan, right? Like he's mortal. He's obviously made bad decisions, like, et cetera. He controls an economy that's one 10th the size of China. Like, let's look at this. Let's look at, I actually just, parenthetically, I just put on Twitter before I start, is something it's like, over the last year, it's like, you know, I've made a mistake in some ways. Like, because I, the way I think about our, how we should think about our foreign policy is almost like as a fiduciary, you know, like, we're fiduciary. People who do our foreign policy should be fiduciary as the American people. So it's like a business kind of thing. You know, you have friends, if you're in a business environment, but you're also competitive and you expect them to do their part if they work at the same company. It's competitive. You know, that's the nature of the business. I think a lot of people do think of foreign policy as almost like a substitute religion. I mean, that, you know, you look at like how Fukuyama has talked over the last year, which is disappointing because I actually thought he had been unfairly characterized over the years, but he's sort of fallen into the own stereotype. But it's like, there is this sort of millenarian element to the discourse that's, I mean, that's part of the problem. I don't know how that relates to the 12th step, you know, maybe they're smoking peyote or something, something like a religious experience,

you know, and that's a lot harder to convince somebody to get off of.
Yeah. So the last, last question, you know, 20th anniversary of the war in Iraq. I'm just not between us because this is the podcast. I'm obsessed with the war in Iraq right now, just because, A, it's been enough time that I think most people, especially in my generation of cohort, either never learned anything about it beyond just like the top, top end talking points or B, people who are like older are kind of using it to advance like their own political objectives. So like, I had a great conversation with Christopher Miller. He was the, you know, Trump's final acting secretary of defense. And, you know, during the conversation we're talking about Iraq and he's talking about, oh, you know, the generals, like they weren't like punished. And I'm like, wait, like, let's go through the decisions. You thought we're bad. That's Paul Bremmer. He's a civilian. Okay. Like that's someone political and White House over like overriding general Shinchecky, et cetera, et cetera, et cetera. If we're going to make the claims we're making about the war, I think like actually analyzing it and trying to separating the political objectives in terms of like trying to win fights today from that is actually really key. So I'm just curious, like, just what, you know, like, what's your, what's just, what are your broad thoughts like on the anniversary? Cause you were my, what's fascinating for me is like, when you were like my age, first coming to DC, that was your centerpiece. That was, I think that that was the main focus.
Yeah. So I sort of experienced it quite, I mean, I was not in an important role or anything, but I was very much in the, in the ether, you know, I was working in the state department as a very junior person at the time, but I am, I'm working on something on this. I think it's very important that we understand Iraq correctly in part because I think the Ukraine war has resuscitated
some of the people. Kagan is actually a good example and, and arguments that I think should be discredited by the Iraq war. I think the Iraq war was a mistake from its conception. So I actually think, you know, Bremer did a lot of things badly, but I don't think Bremer ultimately holds the bag. I think the Iraq war, and some of this has been forgotten because as it's been sort of litigated, that the actual aims, the implicit aims have narrowed, but at the time, and this is like being in Washington, they were very expansive. I mean, it basically was the representation of a foreign policy that's not the similar to the kind of like, you know, Putin is going to be regime changed and, and Russia is going to turn into a democracy. I mean, that, that, that's sort of basically the idea that American force and influence could be used to kind of conclusively resolve problems.
And, you know, that, that's sort of back right now. And a lot of the people who, I mean, I mentioned Kupiyama, who, who had sort of been chastened or had taken knocks because of it have now kind of come back. And, and sadly, I mean, I think the war in Ukraine is a much juster cause than the invasion of Iraq, just to be clear. But I think it will, I fear that it will bear certain kinds of similarities to the situation where we're very ostensibly noble aims are not reachable in a way, and they're going to have immediate but also secondary and tertiary consequences that we can't fully anticipate that are going to be a problem. I mean, I think the Iraq war decision was disaster. I think overthrowing Saddam Hussein could reasonably be anticipated at the time to have meant the likelihood of instability in the region, that it would not solve the proliferation problem through critical to it, like the Chinese sort of views that the demonstration of American dominance would cow everybody. And actually, in some cases, it may have had that effect,

but in other cases, it didn't like the Iranian nuclear program, which we now live with, right? We get Gaddafi, we get Iran, Gaddafi, you get Syria and ISIS. So like, just very clearly, it didn't succeed anywhere near what they actually wanted to achieve. You know, I don't think they would have gone to war if it was just like, oh, we're going to narrowly deal with the WMD program then have all of these problems. I mean, they've been crazy. And the thing to remember is how advantageous our position was in 2000, how we squander. There really is no need for us to be worried about our Taiwan defensibility. That is like, basically, the Iraq decision and the nation building campaign in Afghanistan directly contributed to that. It's not the only reason. There's a lot of ways, mistakes, but like it definitely made it. Otherwise, there were people in the Pentagon 10, 12 years ago who were like, we need to solve this problem. And people like Bob Gates, who relative to some of these people is a force of wisdom and moderation, he was like, no, no, we get this is the war we're in. And that's where we are. And so it's really important that we understand in my view. And I tend, I've always thought that a lot of people blame Blemmer and the dismissal of the, of the Bath and so forth in the army were basically trying to escape the fact that they signed onto the original thing. And again, I'm not like all they're being score about who, but like, I do think it's important when somebody still holds to those views and then is seeking to have influence in the current debate. I think that's important. You know, someone like Tucker Carlson said, I was, I was wrong. Like I admire that. Like, I don't know. I mean, who hasn't been wrong, right? Well, fallible. But I think it's important that that, that, that, that I agree with you. This is very important. I also agree with you. We shouldn't overlearn it that like the Americans, the bad guys or whatever, my view is it was worse than a crime. It was a blunder. And, but that's where we are today. And I think it's critical to recognize that. Yeah, just to close, I love where you ended up because yeah, because key, key claim, I'm not a, you know, a weird revisionist who's like, actually, everything was great until that Paul Bremmer dude showed up. No, no, I know you're not. We should be, I just was like really struggling. And this is where I was kind of pushing him. Like, wait, like, if we actually, like how much of our beats is with like Ricardo Sanchez, if anyone even remembers who he was? I do. Versus, yeah, you do. Right. You know, defense, defense person versus like a broad swimming app, right? Then I'm looking at the last thing here too. And this is, oh, no, the politicians, but although I think we should take with a grain of salt, a lot of these generals run TV all the time, but, but it's definitely. Ricardo Sanchez did not get a TV deal. They're, they're, they're, they're very precise. It was the political strategic decision and it was not the intelligence community's fault either, although they also made mistakes, but it was, it was a political strategic decision and that's where their responsibility should lie. So yeah, I think that is a excellent place to leave it, which has been really great. Do you have anything, so obviously, could you just shout the book out as the book aged? Well, 2021, is it still worth like shouting out the book? Actually, well, I'm biased, but yes, I think so. I deliberately wrote it to be, to age, you know, I'm hoping my, my aspiration is going to be readable in 25 years, but I think it's certainly, if anything, it's probably even more relevant because the, the threat has, has increased from China and we're more distracted than we were even when I published it. So actually, I think if anything, the book is more relevant than ever. So it's the strategy of denial, American defense in an age of great power conflict from alien versus press now out in paperback. Excellent. Thank you for joining me on the realignment. Great. Thanks, Marshall.

Hope you enjoyed this episode. If you learned something like this sort of mission or want to access our subscriber exclusive Q&A bonus episodes and more, go to realignment.supercast.com and subscribe to our $5 a month, $50 a year or $500 for a lifetime membership. Great. See you all next time.