2027

STRATEGIC OUTLOOK · PREVIEW EXCERPT

TAIWAN STRAIT

Pressure without a deadline

How a quieter air lane, a rotating coast guard presence and three political calendars shape the Taiwan Strait in 2027



LOCATOR MAP · NATURAL EARTH · PLACES AT AREA LEVEL · BOUNDARIES ARE NOT AN ENDORSEMENT OF ANY CLAIM

DOCUMENT	VERSION	RESEARCH CUTOFF	PUBLISHED	JUDGMENTS	OVERALL CONFIDENCE
VO-2027-TW	1.0	15 November 2026	17 November 2026	7 · frozen	moderate

Preview excerpt. This file contains the cover, the executive assessment, the judgment table and the publication record of the full document. The complete publication adds the position entering 2027, the evidence and evaluation rule for each judgment, the alternative pathways, the cross-system implications, the monitoring framework and the full source register.

01 EXECUTIVE ASSESSMENT

Pressure without a deadline

CENTRAL JUDGMENT MODERATE

Vigil expects 2027 to continue the pattern 2026 established: less military air activity around Taiwan than in 2025, a rotating Chinese coast guard presence that asserts jurisdiction without enforcing it against trade, and outcomes decided mainly by budgets, elections and leader-level bargaining. The 2027 date attached to the People's Liberation Army is a capability goal reported by others, not a date for action, and no source opened for this document gives it a schedule. The year's tests are whether appropriations and arms transfers become capability, and whether the coast guard's claim stays a claim.

The observed pattern rests on official Taiwanese series and on announcements from both sides. The principal uncertainty is political: a US arms decision, Taiwan's 28 November 2026 local elections and Beijing's choices in a party-congress year can each move it.

The Taiwan Strait enters 2027 as a pressure system that changed shape in 2026 without easing. The Taiwan Security Monitor's compilation of Taiwanese defence-ministry reports counts 2,264 PLA sorties around Taiwan from January to October 2026, about half the 4,569 of the same months of 2025, with every month below its 2025 equivalent[1]. The civil-maritime lane grew: detections of Chinese official ships reached their highest monthly total of the year in October, and China's coast guard announced five named task groups on patrol east of Taiwan from June, about one a month since July[1,2]. No merchant ship bound for a main Taiwanese port is recorded as boarded or inspected, and the London market's Joint War Committee lists no East Asian waters[3,4].

The date most often attached to this subject needs exact handling. The 2027 marker began as a Chinese Communist Party goal for military modernisation by the PLA's centenary; an American admiral gave it a Taiwan reading in March 2021; and the US intelligence community's 2026 threat assessment says ‘Chinese leaders do not currently plan to execute an invasion of Taiwan in 2027’, ‘nor do they have a fixed timeline for achieving unification’[5,6,7]. This publication treats 2027 as a capability benchmark reported by others; it contains no scenario of attack and offers no forecast of one.

What decides the year is more ordinary. In Taipei, an opposition-controlled legislature set the special defence budget at a NT$780 billion ceiling in May 2026, against NT$1.25 trillion requested, replaced a drone procurement act with a funding principle that appropriates nothing, and passed the 2026 general budget only on 14 August[8,9,10]. The 2027 proposal puts defence at NT$1.1225 trillion, 3.01 per cent of GDP, before the same chamber[11]. Vigil expects the enacted total to be lower.

In Washington, a package of about US$14 billion that Congress cleared informally in January 2026 had not been formally notified at the cutoff. President Trump has called such sales a ‘very good negotiating chip’; the Secretary of State cites industrial capacity[12,13]. Two leader summits passed without a decision, the US–China trade truce runs to 10 January 2027, and NBC News projects Democratic control of both chambers of the Congress that sits that month[14,12,15]. Vigil considers it plausible, on a weak evidential basis, that part of the package is notified during 2027 and that Beijing answers with a named exercise.

In Beijing, the Central Committee has set the 21st Party Congress for the second half of 2027, the PLA's centenary year[16,5]. One analyst's account has the Central Military Commission reduced by purges to its chairman and one vice-chairman[17]. Beijing's Taiwan instruments in 2026 were legal, economic and political: measures against named people and firms, and a party-to-party channel to the Kuomintang[18,19]. Vigil does not expect a unification timetable from the congress.

Resilience is the slowest variable. Gas, Taiwan's shortest-covered fuel, carried an 11-day stock requirement in 2026, planned to rise to 14 days in 2027, and the economics minister has said the Maanshan nuclear plant 'could resume operations as early as 2028'[20,21]. Three thresholds matter: an enforcement act against trade, a war-risk listing, and a dated political instrument from Beijing. None was crossed in 2026. VIGIL ASSESSMENT

PRINCIPAL DRIVERS

DRIVER 01

A coercion mix that moved from aircraft to white hulls

Air activity halved year on year while official-ship detections reached a 2026 high and a named coast guard group rotated east of the island. The instrument asserts jurisdiction at lower escalatory cost than military sorties and is harder for Taipei to answer.[1,22]

DRIVER 02

US–China leader bargaining with Taiwan arms inside it

At the May 2026 Beijing summit Xi announced a relationship of 'strategic stability' to guide ties 'over the next three years and beyond'; the US$14 billion package stayed unnotified through that summit and September's. Arms timing has become a diplomatic decision as well as an industrial one.[23,12]

DRIVER 03

A divided government in Taipei

The opposition majority survived the August 2025 recall votes and has since cut or restructured the defence appropriations put to it. What Taiwan fields in 2027 depends on enacted budgets and on a conscript intake that ran well under plan in 2025.[24,9,25]

MOST CONSEQUENTIAL DEVELOPMENTS IN VIEW

A named exercise returns

Vigil considers it plausible that the Eastern Theatre Command names at least one exercise around Taiwan in 2027, most likely in answer to a US arms notification or a political date.[26,12]

The 2027 budget arrives smaller

Vigil expects the defence total enacted for 2027 to fall below NT$1.1225 trillion. On the Cabinet's GDP forecast, a net cut of more than about NT$3.5 billion puts spending under the 3 per cent line the president set.[11]

The coast guard presence becomes ordinary

Vigil expects a named task group east of Taiwan in every quarter of 2027, short of any act against merchant shipping.[3,2]

PRINCIPAL UNCERTAINTIES

WHAT IS NOT KNOWN

- Whether Washington notifies the held arms package, and how Beijing prices its response against the trade truce.
- What the 28 November 2026 local elections and referendum, held after the cutoff, do to the legislature's budget behaviour and the 2028 presidential field.
- Whether the unannounced far-seas naval concentration of October–November 2026 was a one-off or a new exercise form with no declared area to observe.

CONFIDENCE — THE ANALYTICAL BASIS

HIGH MODERATE LOW

How well sourced and how contested the evidence is. High is the quietest mark by design.

EXPECTATION — THE OUTCOME

EXPECTED PLAUSIBLE NOT EXPECTED

Vigil's judgment for the stated horizon. Never a number.

EVIDENCE STATUS

ESTABLISHED ATTRIBUTED VIGIL ASSESSMENT UNRESOLVED CONDITIONAL

What kind of statement a sentence is. The louder the mark, the less is claimed.

02 FINAL JUDGMENT TABLE

The 2027 judgments at a glance

ID	JUDGMENT	EXPECTATION · HORIZON	BASIS	SUPPORTED IF
VO27-TW-01	Vigil expects detected PLA air activity around Taiwan in 2027 to remain below its 2025 level — a full-year sortie total, on the Taiwan Security Monitor's compilation of Taiwanese defence-ministry reports, lower than the 2025 total — while China's coast guard announces a named task group on patrol east of Taiwan in every quarter of the year.	EXPECTED By 31 December 2027	MODERATE	The Taiwan Security Monitor's 2027 full-year sortie total is below its 2025 total, and in each quarter a named Chinese coast guard task group east of Taiwan is announced by the China Coast Guard or reported by Taiwan's Coast Guard Administration. If the Monitor stops publishing or changes its count, both years are summed from the defence ministry's daily reports; if those stop, the air limb is not evaluable.
VO27-TW-02	Vigil considers it plausible that the PLA Eastern Theatre Command announces at least one named joint exercise around Taiwan between 1 January and 31 December 2027.	PLAUSIBLE By 31 December 2027	LOW	During 2027 the Eastern Theatre Command or the PRC defence ministry announces at least one exercise around Taiwan under a proper name, as carried by Xinhua or recorded by Taiwan's defence ministry.
VO27-TW-03	Vigil does not expect China's coast guard to board, inspect or detain a merchant vessel bound for Kaohsiung, Keelung or Taichung by 31 December 2027, and does not expect the Joint War Committee to add Taiwan or the Taiwan Strait to its Listed Areas in that period.	NOT EXPECTED By 31 December 2027	MODERATE	During 2027 neither government, nor Reuters or CNA, reports a boarding, inspection or detention by China's coast guard of a merchant vessel bound for Kaohsiung, Keelung or Taichung, and no Joint War Committee circular names Taiwan or the Taiwan Strait. If the committee stops publishing, P&I club listed-area notices are used.
VO27-TW-04	Vigil expects the defence total enacted in Taiwan's 2027 central government budget to be lower than the NT$1.1225 trillion the Cabinet proposed.	EXPECTED By 31 December 2027	MODERATE	At third reading of the 2027 general budget, the defence total on the Cabinet's NATO-style definition, as published by the budget office or reported by CNA, is below NT$1.1225 trillion. If no such total is published, any net cut to the Ministry of National Defense's proposed NT$691.9 billion counts. Items frozen but not cut are not reductions.
VO27-TW-05	Vigil considers it plausible that the US administration formally notifies Congress of at least part of the roughly US$14 billion arms package for Taiwan between 1 January and 31 December 2027.	PLAUSIBLE By 31 December 2027	LOW	During 2027 the Defense Security Cooperation Agency publishes at least one congressional notification of a Foreign Military Sales case for Taiwan that the administration, Reuters or CNA identifies as part of the held package; if the agency stops publishing, the official record of notification to Congress is used. A notification before 1 January 2027 does not count.
VO27-TW-06	Vigil does not expect Beijing to publish a timetable for unification, or to adopt a law or establish a body mandated to produce one, by 31 December 2027, including at the 21st Party Congress.	NOT EXPECTED By 31 December 2027	MODERATE	No Party Congress report, Central Committee document, law or State Council white paper published in the period, as carried by Xinhua, states a year or deadline for unification, and no law or body mandated to produce one is adopted or created.
VO27-TW-07	Vigil does not expect the Maanshan nuclear plant to return to commercial generation by 31 December 2027, whatever the result of the 28 November 2026 referendum.	NOT EXPECTED By 31 December 2027	HIGH	On 31 December 2027 neither Taipower nor the Nuclear Safety Commission has announced that a Maanshan reactor has resumed commercial generation.

03 PUBLICATION RECORD

Edition, version and forecast-freeze status

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