

The Big Read Japanese politics & policy

## **The country that can't say no to Trump**

Tokyo is in need of a plan B to dependence on the US.

There may not be one

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At a fiery press conference on Monday, Donald Trump listed the allies he had expected to join the war in Iran but which had not. Nato, Australia and South Korea were all namechecked. And then he turned to the country that has long aspired to be America's most loyal friend.

"You know who else didn't help us? Japan," said the US president, pointedly adding that there were currently 50,000 US troops stationed across the Japanese archipelago.

For Sanae Takaichi, the Japanese prime minister who last month strove to avoid that exact accusation at a delicate summit with Trump, the president's comment defined Japan's crisis.

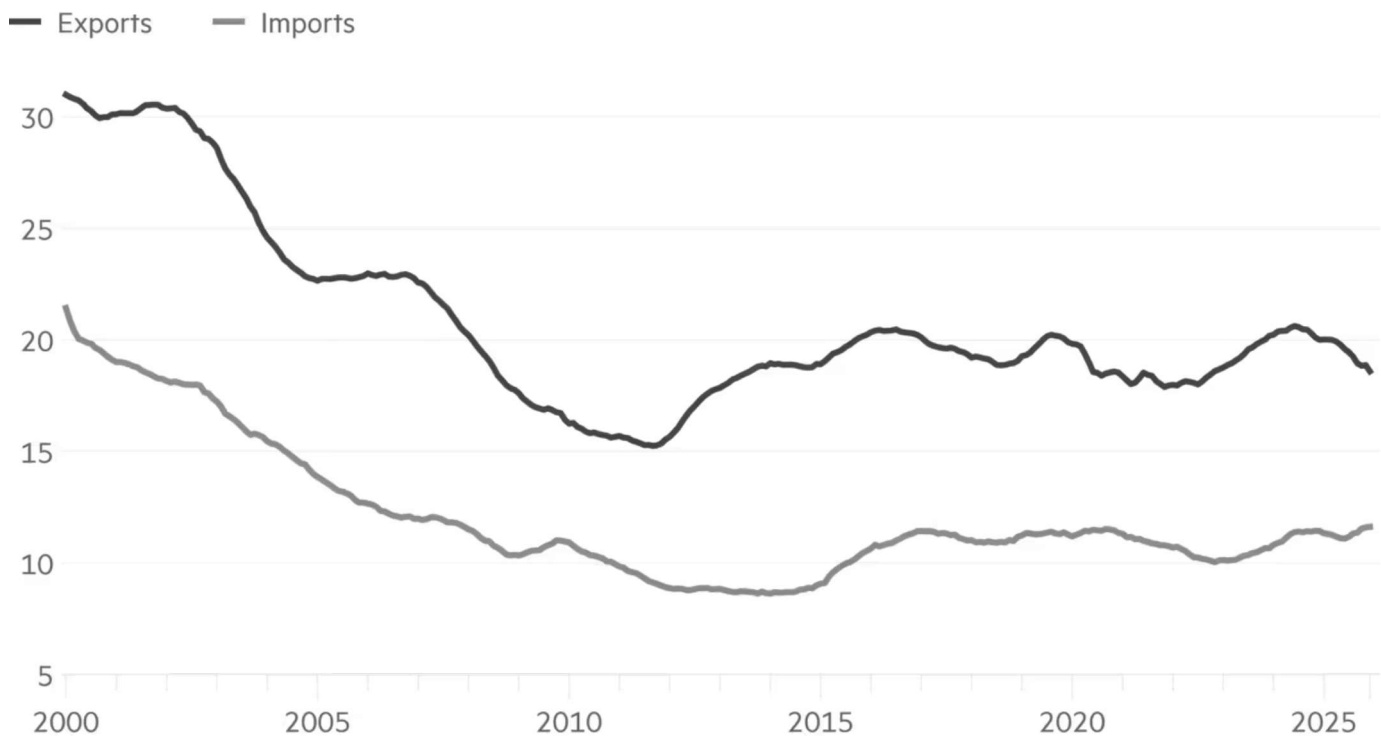
Even among a crowded field of bewildered US allies across Asia and Europe, Japan is particularly afflicted by Trump's sudden shifts of position.

The country faces a still greater challenge than Europe in finding an alternative to an unpredictable Washington to secure its defence since its US-written constitution renounces war. And yet its need is all the greater because of China's rise and the proximity of a nuclear-armed North Korea.

Japan's \$130bn of exports to the US have been subjected to what its negotiators privately call a "mob-style shakedown", in which Tokyo agreed to invest \$550bn in America to prevent even higher tariffs.

## The US is a hugely important market for Japanese exporters

US share of Japanese trade in goods (over previous 12 months, %)



Source: IMF DOTS

“It’s turning into a bad, almost abusive, relationship,” says Margarita Estévez-Abe, a Japan expert at Syracuse University. “The more Japan tries to please, the worse it is treated.”

But geography is what makes Japan’s dilemma stand out most of all.

With Trump due to meet Chinese President Xi Jinping in May, Tokyo’s nightmare scenario, say Japanese officials, would be an agreement to establish a “G2” that would prioritise US-China relations at the expense of Japan and other longstanding US allies in the Indo-Pacific.

“That is what worries me,” says Taro Kono, a former foreign and defence minister, who frets that Japan has limited means to resist such an outcome.

“We don’t have much choice, and we should have made some changes years ago. We should have created a stronger defence industry. We should have shouldered more of the burden for stability in east Asia. We should have changed the constitution sooner. But all of that would have been very difficult.”

Takaichi is fighting two simultaneous battles: a struggle to minimise the damage Trump is inflicting on Japan and a longer campaign to find a modus vivendi once the US president leaves office.

Her problem is whether Japan, the fourth-largest economy in the world, will be in any shape at all to find an alternative to dependence on the US — or whether Tokyo just cannot say no to Trump.

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**In 2018**, the second year of Trump's first term, the late Shinzo Abe, Takaichi's mentor and a predecessor as prime minister, found himself making an unusual argument to the US president. He told Trump that Japan did not drop bowling balls on to cars to keep out American imports.

Trump had publicly accused Tokyo of a regulatory ruse in which balls were dropped from 20 feet in the air. The slightest dent, he said, could disqualify a US car from the Japanese market.



Trump on a visit to Japan in October 2025. Last year Tokyo agreed to invest \$550bn in the US to prevent tariffs from climbing further  
© POOL/ZUMA/Shutterstock

After a huge effort by Abe, the president was persuaded the test did not exist.

“Then, as soon as Trump began his second term, he started talking about Japan’s bowling ball test again,” said a delegate who was on the trip with Abe. “Nothing is permanent with him.”

The link between Trump’s vacillating views on bowling balls and Takaichi’s current problems, says a member of the prime minister’s inner circle, is more than just his erratic nature. It is the feeling of powerlessness he forces upon allies the US has historically most empowered — especially Japan.

When Trump hit the world with swingeing import duties in 2025, Tokyo’s initial dismay at not receiving an exemption was followed by the imperative to strike a deal. Its subsequent agreement to invest \$550bn in the US was bluntly referred to by US commerce secretary Howard Lutnick as Japan “buying down the tariffs”.

Under the deal, Japanese companies receive only 10 per cent of profits from investments. “It’s a protection racket and Japan cannot escape the extortion,” says Estévez-Abe.

**The alliance that used to be sacrosanct is now up for grabs. It has become exposed by Trump’s transactional world view**

But the nature of Japanese dependence goes far beyond trade and investment. Tokyo relies hugely on Washington for security — from the US nuclear umbrella to the military support necessary to defend it from attack.

Japan’s unusual ability to speak softly while the US carries the big stick has underpinned its zealous participation in supranational organisations and development into one of the most successful economies in history. But things have visibly changed.

“Soft-power Japan is having to adapt very quickly to life in a hard-power world and, in terms of the alliance, in a very different set-up than the one it thought it was in,” says Joshua Walker, president of the Japan Society.

“The alliance that used to be sacrosanct is now up for grabs. It has become exposed by Trump’s transactional world view . . . There is a realisation that a relationship it has always taken for granted now has to be navigated on a case-by-case, day-by-day basis.”

**Late last month**, Takaichi made an inaugural visit to the Oval Office for her summit with Trump, hot on the heels of an election in which she had rescued her Liberal Democratic Party (LDP) from decline, delivering instead a supermajority in the lower house of parliament — a possible springboard for amending the constitution.

Some argue the prime minister is playing Japan's hand well: the US-Japan security alliance, unlike Nato, is functionally intact. People familiar with the two countries' military co-operation note little disruption under Trump to date.

## Japan's military budget is expected to hit 2 per cent of GDP this year

Defence spending as a % of GDP



Sources: World Bank, Cabinet Office

But there is a fear in the top echelons of the Japanese government, and among a growing portion of the general public, that the relationship is more frail than it appears.

As the US and Israel's war against Iran raged, Trump goaded Takaichi about Japan's reliance on the Middle East for 90 per cent of its oil.

When questioned at the summit why he had not consulted the US's closest ally in Asia before attacking Iran, Trump responded with a comment about the Japanese attack on Pearl Harbor — a moment many in the country found excruciating but which government officials sought to brush off.

Sometimes it is even worse when Trump does not speak. In October, soon after becoming prime minister, Takaichi acknowledged that if China attacked Taiwan, Japan would become militarily embroiled. Incensed, Beijing began a diplomatic broadside against Tokyo that has yet to cease.

Taiwan is the most dangerous flashpoint in Asia, one that raises the spectre of a US conflict with China.

But Washington did not come to Takaichi's rhetorical defence. Beyond a belated social media post by the US ambassador in Tokyo, the silence from Trump and his team was deafening.

Under such circumstances, Takaichi's summit mission was clear. She had to leave Washington with a reassurance that Japan's security was still guaranteed and that Trump was not planning a big shift on China.

Takaichi also needed to convince the US president, who had begun taunting Britain for not committing militarily to war in the Middle East, that Japan's constitution prevented it from participating.

She employed what one US diplomat called “weapons-grade flattery and strategic transactionalism”. Addressing Trump in the Oval Office, she opened with: “It is only you, Donald, who can achieve peace across the world,” before confirming Japanese investment in US-based projects that could amount to an estimated \$73bn.

Her approach appeared to work. People familiar with the meeting said Trump did not insist that Japan break the constraints of its constitution and send military support to the Strait of Hormuz, or make a dreaded demand that Tokyo pay a larger share of the cost of stationing US forces in Japan.

A man fishing at Isogo fishing pier opposite Eneos Negishi refinery in Yokohama. Japan is reliant on the Middle East for 90 per cent of its oil © Stanislav Kogiku/SOPA/Reuters

She left with reassurances that Tokyo remained firmly under the US security umbrella, language from the president that her country was “stepping up to the plate on Iran” — to be superseded by his criticism weeks later — and a promise from Trump to be “singing Japan’s praises” during his summit with Xi.

But the China part was less clear. The White House issued a statement stressing the leaders’ commitment to “peace and stability across the Taiwan Strait” at what people familiar with the matter said was Tokyo’s urging.

Japan itself conspicuously omitted the same phrase — to avoid angering China at a delicate time.

While almost no experts in the US think Trump will negotiate a deal with Xi that resembles Richard Nixon’s 1972 “opening of China”, Japanese officials remain nervous that he is in hot pursuit of a legacy-defining accord with Beijing.

Hatsue Shinohara, an expert on US-Japan relations at Waseda University, says that the Trump-Takaichi summit, intended as a sign of stability, clarified the limits of Japan's scope of action. "With China-Japan relations having declined so much, we need our ally," she adds. "We are used to being a subordinate nation."

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**John Roos, US ambassador** to Japan under the Obama administration, commends Takaichi, and Abe before her, for "doing everything they can to keep the alliance intact". He adds: "She deserves credit for that. But given what is happening, she must be thinking about hedging her bets."

Such thinking would chime with Japanese public opinion. In December, a survey by the research group Genron NPO found just over 60 per cent opposed to Trump's actions, principally because of disapproval of the tariffs.

## **The only way you can change course in Japan is if you decide China is not a real threat and live with it**

About a quarter said his actions had permanently changed the world, or that it would take at least a generation to return to the way it had been. Only 20 per cent said they trusted Washington and just 51 per cent said Japan should continue to rely on the US nuclear umbrella.

Kono, the former foreign and defence minister, thinks the US's recent conduct means that "middle powers like Japan" need to act collectively — "maybe create a United Nations 2.0" — to avoid being governed by the whim of an unreliable ally.

"The countries that want to create a new world order have to act now," he says, making an argument now gaining some traction among Japan's political class.

Some US allies have also used such language. Canadian Prime Minister Mark Carney became the talk of the World Economic Forum in Davos this year by calling on the middle powers to unite as the world's old rules-based order collapses. Spain's Pedro Sánchez led European opposition to Trump's "illegal" attack on Iran.

But Japan, notes Robert Dujarric, co-director of the Institute of Contemporary Asia Studies at Temple University, does not have good alternatives to the US alliance, and Washington knows that.

Unlike a country such as Brazil, he says, Japan sees itself as being in a dangerous neighbourhood, with China, North Korea and Russia nearby. But to deal with such a threat on its own “would take 10 to 15 years of investment”.

Workers at a crossing at Akihabara Electric Town, Tokyo. In a Genron NPO poll in December only 20 per cent of Japanese said they trusted the US © Franck Robichon/EPA

Even if Japan looks for alternative allies in Europe or elsewhere, none can project serious power into Asia.

The country's options are limited by history and design. The US-Japan alliance is a product of the US-led postwar order and, via the positioning of the more than 50,000 American personnel at 120 military facilities around Japan, its enforcer.

“The only way you can change course in Japan is if you decide China is not a real threat and live with it,” says Dujarric. “Or you call America’s bluff on its need to have bases in Japan, which is risky.”

At the heart of the relationship is Japan’s constitution — a document drawn up by occupying American officials after the country’s 1945 defeat as a long-term constraint on a rebirth of militarism.

Article 9, which includes the pledge that “land, sea, and air forces, as well as other war potential, will never be maintained”, enshrines Japan’s pacifism.

But over the years, evolving interpretation of the clause, always with US endorsement, has allowed Japan to build a significant military and assign defence a rising proportion of GDP — now around 2 per cent.

Since 2014, the country has given itself scope to consider an attack on an ally as an attack on itself, justifying potential military action. Last month, for the first time, Japan began installing long-range missiles capable of striking well beyond its own borders.

Takaichi scored her electoral triumph in February with a pledge to push through the first ever amendment to the constitution — most likely, said LDP members, a rewording of Article 9.

Shusuke Takahara, a prominent expert on the US-Japan relationship, says Tokyo should step up its efforts to look beyond the alliance with Washington, even though he thinks most ruling party MPs do not see a need to reduce dependence on the US.

Troops in an annual drill at Narashino exercise field in Funabashi. The US has 120 military facilities and more than 50,000 personnel around Japan © Kim Kyung-Hoon/Reuters

At many levels of Japan's political and bureaucratic establishment, say MPs and officials, there is a distinctive "American School" that asserts the need for the strongest possible ties with Washington, and to treat any bilateral crisis as a temporary blip to be managed through compromise.

The American School's strongest proponents now argue that, for all the fire and brimstone of Trump's speeches and the pressures he has put on Japan, his second term's key policy document represents a continuing commitment to stability in Asia.

In language that contrasts with the lack of such pledges on Europe, the US's 2025 national security strategy vows to keep the Indo-Pacific "free and open" — adopting a phrase coined by Abe — and to strengthen partnerships that "will be the bedrock of security and prosperity long into the future".

The American School also maintains that Japan should mollify Trump where possible but ultimately just wait until he leaves office. Even if the US does not snap back to a pre-Trump mode, the US-Japan relationship is too valuable for any future president to squander.

Christopher Johnstone of The Asia Group consultancy, a former top Japan expert at the Pentagon and White House, says while there is "deep concern" in Japan about the long-term credibility of the alliance, it is "not panic".

"Takaichi's visit demonstrates a continued determination to find common ground and common cause with President Trump," he says.

"Japan is certainly hedging — investing in its own defence industrial base and diversifying security ties — but the reality is that for the foreseeable future there is no alternative for Tokyo to the alliance with Washington," Johnstone adds. "There remains a confidence in Tokyo that, at the end of the day, the Trump administration needs Japan to achieve its objectives in Asia."

Anna Kelly, deputy White House press secretary, said the US-Japan alliance was the "cornerstone of peace and security in the Indo-Pacific".

"Our two countries have never been more aligned than under the leadership of President Trump and Prime Minister Takaichi. Our two nations continue to co-ordinate on economic, trade and security matters," she added.

Takahara says Japan should be using the hiatus in normal diplomacy to become not just the most trustworthy ally of other Asian countries, but to prepare for a wider world adjusting to the fundamental shifts in America's stance: "A middle-power coalition is realistic, it should be expanded, and Japan needs other partnerships."

At present, however, senior Japanese officials say traditional working-level US-Japan engagement has become "extremely thin" in many areas. The fear in Tokyo is that the US is taking Japan for granted.

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**In 1989, the nationalist** politician Shintaro Ishihara and Sony co-founder Akio Morita co-wrote a short book entitled *The Japan That Can Say 'No'*. Penned at what turned out to be the peak of the Japanese asset bubble, the work marked the apex of Japan's industrial self-confidence and sense that national destiny would eventually take its economy beyond America's.

The book, which suggested alternatives to Japan's dependence on the US, was incendiary both at home and in Washington. Today, it is out of print: not even worth republishing as an artefact of a time when change might have been possible.

Takaichi, right, in parliament on April 7. Despite her unprecedented supermajority she runs a Japan that cannot say 'no' to Washington © Issei Kato/Reuters

But the phrase, in 2026, has re-entered the national conversation to define, in the negative, the options available to Tokyo. Takaichi, despite her parliamentary supermajority, and in common with all her predecessors since the second world war, runs a Japan that cannot say “no” to Washington.

Tetsuo Kotani at the Japan Institute for International Affairs says Tokyo has few choices. The alternatives to reliance on the US, he argues, are to guarantee Japan's security by acquiring nuclear weapons, building a network of Asian defensive co-operation or accepting a “Pax Sinica” Chinese hegemony of Asia.

“If we go nuclear, we sacrifice conventional military spending. Asian co-operation is possible but provides no nuclear umbrella and accepting Pax Sinica is out of the question,” he adds.

“So we are left with plan A plus — an enhanced relationship with the US, more military spending and more military industrial co-operation,” Kotani says. “There is no plan B.”

*Data visualisation by Keith Fray*

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