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Situation in East Asia and Japanese Politics/Economy

Oppose the Takaichi Administration's Military Expansion and Constitutional Revision



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This article was originally published in the issue August 24 of “Weekly Kakehashi (Bridge)” of the Japanese section of the Fourth International and the original has two chapters about the global situation and the international influences of the war in Middle East. But the author, in translating into English, deleted this part to highlight the situation in East Asia and Japan.

Over the past year, the domestic and international situation has undergone extremely rapid and drastic changes, which are still unfolding today. Following the 2026 U.S. National Security Strategy released in December last year, this year has seen a series of events; the invasion of Venezuela and the abduction of its president Nicolás Maduro and his wife and adviser, Cilia Flores by US forces, and the US control over that country; attacks on Iran by the U.S. and Israel; the closure of the Strait of Hormuz by both Iran and the U.S.; Israel's genocide in Gaza and its attacks on Lebanon; and the ongoing prolongation and expansion of war in the Middle East. Furthermore, examples illustrating these dramatic shifts are too numerous to mention—ranging from the Russian invasion of Ukraine and Trump's "America First" policy triggering global military expansion and militarization across Europe and beyond, to the deepening political crisis in the two superpowers, the U.S. and China.

Moreover, the worsening climate crisis is being accelerated further by these successive wars. In Europe, record-breaking heatwaves have killed thousands and sparked frequent, massive wildfires. Devastating floods across Asian countries and mudslides caused by glacier collapses in Nepal are also driven by this deepening crisis. Furthermore, amid the crisis of the capitalist system, bourgeois regimes worldwide are moving toward authoritarianism and neofascism. Responding to this trend in Japan, the Takaichi administration was formed, and following its overwhelming victory in the general election, it has initiated a "true strategic pivot" risking the survival of Japanese imperialism.

The rapid acceleration of these changes—far exceeding our expectations—reflects the multifaceted crisis of global capitalism and marks our entry into an extraordinarily uncertain and unstable era. Under these circumstances, while grasping the entire picture of the situation is an extremely difficult task, attempting to comprehend it from a global perspective is indispensable for those of us aiming for ecological socialism. This essay attempts to organize key concepts toward that end and provide material for discussion.

The Balance Sheet of Successive Summits and the East Asian Situation

From May to June, Chinese President Xi Jinping held a series of summit meetings with U.S. President Donald Trump, Russian President Vladimir Putin, and North Korean General Secretary Kim Jong Un. The outcomes of these summits reflect shifting power dynamics among imperialist powers following the events in Iran and the Middle East, carrying significant implications for the situation in East Asia.

First, the U.S.–China Summit held on May 14 and 15 effectively shelved fundamental issues surrounding the inter-imperialist rivalry between the United States and China, agreeing instead to a temporary truce under the banner of "strategic stability." For Trump, pursuing "America First" ahead of the midterm elections six months away required demonstrating tangible transactional achievements to the American public. However, contrary to his initial intentions, he ended up begging for China's assistance to resolve the war with Iran, forcing him into concessions on the Taiwan issue. Xi Jinping presented extremely concrete demands, urging the United States to alter its official position from

"the U.S. does not support Taiwan independence" to "the U.S. opposes Taiwan independence," and to halt arms sales to Taiwan. At the same time, facing a prolonged economic slump and lacking effective remedies, Xi sought to temporarily ease imperialist tensions with the U.S. to buy time. In that sense, no deal was struck that defied prior expectations. Regardless, the inter-imperialist conflict between the U.S. and China will inevitably continue over the medium to long term.

The subsequent China–Russia Summit clearly demonstrated China's dominance. Since Russia's invasion of Ukraine, the Sino-Russian relationship has fundamentally shifted toward Russian reliance on China. From an economic standpoint, Russia has become a partner that China "can replace if lost," whereas China has become "irreplaceable" for Russia (trade with China, including transactions via third countries, accounts for approximately 40–45% of Russia's total trade). Although the China–Russia Summit emphasized their partnership, it yielded few concrete results for Russia.

In the June China–North Korea Summit, Xi Jinping appeared to accommodate Kim Jong Un. This occurred against the backdrop of a North Korean economy booming from windfall demand created by the war in Ukraine. According to several visit reports, the economy is thriving, at least around Pyongyang. North Korea supplied troops and ammunition for the war in Ukraine, receiving urgently needed supplies such as food and oil from Russia in return, while earning an estimated \$10 billion (approx. 1.6 trillion yen) or more from arms sales to Russia (according to South Korea's Institute for National Security Strategy). Backed by this strengthened relationship with Russia, North Korea's bargaining power against China increased; consequently, unlike in past meetings, Xi Jinping made no mention of the "denuclearization of the Korean Peninsula" during the summit.

In effect, China tacitly recognized North Korea as a nuclear-armed state. The Chinese Communist Party regime has traditionally viewed North Korea as a buffer state against the United States. In that sense, historically speaking, the presence of U.S. military bases in South Korea (and Japan/Okinawa) has served as the baseline foundation for the existence of the North Korean state. Furthermore, North Korea amended its constitution to reflect the concept of "two states" on the Korean Peninsula, introducing a new territorial clause that defines: "The territory of the Democratic People's Republic of Korea includes the territory bordering the People's Republic of China and the Russian Federation to the north and the Republic of Korea to the south, along with the territorial waters and airspace established on that basis." However, the phrasing referring to South Korea as a "hostile state"—which Kim Jong Un had mentioned during the Supreme People's Assembly in March—was ultimately not incorporated into the constitution.

Japan's Remilitarization and the Strategic Pivot Initiated by the Takaichi Administration

Following a landslide victory in the general election, Prime Minister Takaichi prioritized a series of policy agendas: economic packages driven by proactive fiscal policy; strengthening defense capabilities through revisions to the Three Defense Documents; establishing a National Intelligence Bureau and enacting anti-espionage legislation; reconsidering the Three Non-Nuclear Principles if necessary; tightening policies on foreign national control; legalizing the official use of maiden names; and laying the groundwork for revising the Imperial Household Law and amending the Constitution. In addition, as a starting point to challenge deeply divided public opinion, abolishing the "Five Categories of Arms Exports"—thereby granting complete clearance for arms exports, including lethal weaponry—aimed to reinforce military alliances across East Asia and transform the defense industry into an engine of economic growth.

In Okinawa and the Nansei Islands, the construction of Self-Defense Forces (SDF) bases and the deployment of missile and electronic warfare units are progressing at a rapid pace. On the Japanese mainland, rear-support bases

integrated with the Nansei Islands are being prepared through the construction of missile ammunition depots, the deployment of long-range missiles and Tomahawks, and the enhancement of transport capabilities via the military utilization of commercial ports and airports. In fiscal year 2026, the Joint U.S.-Japan Military Exercise "Resolute Dragon," designed to strengthen coordination and joint response capabilities between U.S. and Japanese forces, focused entirely on Okinawa and Kyushu as exercise grounds, featuring drills concentrated on remote island defense.

Furthermore, the SDF has repeatedly joined joint U.S.-Philippine military exercises in the Philippines. "Balikatan 26" (April 20 to May 8) mobilized more than 17,000 personnel from the Philippines, the United States, Australia, Japan, Canada, France, and New Zealand. The SDF contributed approximately 1,400 troops alongside the destroyers *Ise* and *Ikazuchi*, the landing ship *Shimokita*, transport aircraft, and amphibious rescue aircraft. In "Kamandag 26" (June 15 to July 1), the Ground Self-Defense Force deployed its 1st Airborne Brigade, Central Nuclear Biological Chemical Weapon Defense Unit, Counter NBC Weapon Medical Unit, and NBC Weapon Defense School alongside U.S. and Philippine Marines, carrying out airborne drop training. The stated objective of this exercise was to "maintain and improve the integrated operational capabilities concerning cross-domain operations of the SDF, while contributing to the creation of a security environment that does not permit unilateral attempts to change the status quo by force." Coupled with full-scale arms exports to the Philippines, these actions reflect an intention to fortify military alliance networks across all of East Asia, extending beyond Far East Asia. This series of policy shifts and SDF maneuvers must be recognized as the inception of a true strategic pivot by the Takaichi administration.

Regarding the Political Character of the Takaichi Administration: Inclination Toward an "Authoritarian" Regime

We have viewed the political character of the Takaichi administration—against the backdrop of the global rise of authoritarian regimes—as having the "potential to become an 'elected authoritarian regime' under a soft exterior." Indicators reflecting this authoritarian shift include top-down decision-making led by the Prime Minister's Office that dismisses parliament, the creation of a "desecration of the national flag" offense, tightened control over foreign nationals, and preparations to establish a National Intelligence Bureau and pass anti-espionage legislation. However, further close monitoring of future developments is required regarding the likelihood of a fully "authoritarian regime."

The political foundation supporting the Takaichi administration relies on external factors, such as high approval ratings, the confusion and retreat of the centrist opposition, and the marginalization of the parliamentary left. Regarding centrist forces, while the integration of the Constitutional Democratic Party and Komeito into the Centrist Reform Alliance in the House of Councillors and local assemblies lagged behind, a series of defectors—primarily former Constitutional Democratic members who lost their seats in the general election—left the centrist force realignment around the Centrist Reform Alliance without a clear outlook. This culminated in the effective dissolution of the Centrist Reform Alliance on August 31. On the parliamentary left, the Social Democratic Party lost its seats in the House of Representatives, facing an existential crisis. Meanwhile, Reiwa Shinsengumi is experiencing an ongoing internal crisis following the resignation of its charismatic leader, Taro Yamamoto, accompanied by the election of a new leadership, a change in party name, and the departure of several lawmakers.

Although Prime Minister Takaichi had been sustained by high cabinet approval ratings, public opinion polls conducted in July showed a widespread and sharp decline in support. In a Mainichi Shimbun survey, disapproval ratings finally surpassed approval ratings. A fall in support among younger generations and women has been notably reported. Regarding this decline in support for the Takaichi cabinet, several key factors warrant attention:

The initial surge generated by Prime Minister Takaichi's popularity, high expectations, and the nationalistic

enthusiasm for a "strong Japan" has passed its peak, with public focus returning to realities such as parliamentary missteps and daily economic hardship.

The temporary high expectations surrounding Prime Minister Takaichi did not necessarily translate to approval for her right-wing platform or high-handed posture.

A clear rift has emerged within the conservative camp between liberal conservatives and reactionary nationalists.

Among Western "major powers," the Takaichi administration stands alone in following the runaway actions of Donald Trump. This has amplified a sense of alarm even within the bourgeois mainstream, a sentiment reflected in recent newspaper editorials. In particular, note should be taken of how mainstream bourgeois outlets like the Nikkei and Yomiuri have harshly criticized Prime Minister Takaichi's management of parliament.

The Economic Policies of the Takaichi Administration and the Future of the AI Bubble

Regarding economic policy, Prime Minister Takaichi has adhered strictly to an expansionary stance and proactive fiscal policy, envisioning AI and the arms industry as the main pillars of economic growth. Her administration has shown reluctance toward addressing raw material shortages and rising prices; rather than promoting energy conservation, it formulated a supplementary budget centered on spending subsidies for gasoline, electricity, and gas bills.

"The core of this system—stretching from the United States to Europe and Japan—remains stuck at modest growth rates or in stagnation. As for the United States, economic growth has been supported almost entirely by massive investments in AI data centers by tech giants and the accompanying stock market bubble" (from the aforementioned Smith paper). A similar economic phenomenon is occurring in Japan. The Nikkei Stock Average temporarily surpassing the 70,000 yen mark was driven by a massive influx of capital into AI and semiconductor stocks, making the degree of the bubble even higher due to a concentration in AI and semiconductor shares that exceeds that of the U.S. Because "the degree of concentration in specific sectors is stronger than in the U.S. market, and the benefits of high stock prices are not spreading to every corner of Japan" (Nikkei Shimbun), it forms a structure that increasingly concentrates wealth among a small portion of the wealthy.

The AI bubble will not last indefinitely. If further technological innovation renders giant AI data centers themselves unnecessary, or if it becomes clear that vast investments in them fail to yield profits, the bubble will collapse all at once. In fact, as soon as a high-performance generative AI developed by a Chinese startup was announced, stock prices of AI and semiconductor shares plummeted sharply in both the United States and Japan. Shares of semiconductor giant Kioxia—whose market capitalization had temporarily surpassed Toyota Motor—plunged to less than half their value in a single stroke. The Nikkei Stock Average also recorded a drop of over 10,000 yen in just over a month from its record high of 72,366.34 yen on June 25. An economic policy reliant on an AI stock bubble that is drastically disconnected from the real economy is bound to fail.

Progressive Poverty, Inequality and Worsening Hardship Driven by Escalating Inflation

With the U.S.-Israeli strikes on Iran and the subsequent blockade of the Strait of Hormuz nearly severing crude oil shipments from the Middle East, the Japanese government has responded to oil shortages and skyrocketing prices by releasing strategic petroleum reserves. Nevertheless, price hikes and localized shortages of petroleum-related products persist. Even if the blockade of the Strait of Hormuz is lifted and Middle Eastern crude imports resume, restoring oil facilities in the Middle East will likely take time. Contrary to Trump's boasts, crude oil prices are unlikely to return to pre-war levels. Consequently, Japan faces a sharp increase in costlier crude oil imports, creating conditions for trade deficits, further depreciation of the yen, and continued inflationary pressures. On June 16, the Bank of Japan decided to raise its policy interest rate to around 1.0%, a move driven by the judgment that "controlling inflation through rate hikes was necessary, prioritizing the rising risks of inflation stemming from high crude oil prices over the risk of economic deterioration caused by the Middle East situation" (Mainichi Shimbun).

However, the weakening of the yen has not stopped, breaking through the 160 yen per dollar mark. In response, U.S. and Japanese monetary authorities conducted coordinated foreign exchange interventions, temporarily strengthening the yen by nearly 10 yen; however, this is by no means sustainable. Price increases driven by global inflation and a weak yen have generated massive profits for giant monopolies—as seen in listed companies reporting a 68% year-on-year increase in consolidated net profits for the April–June quarter of 2026. At the same time, these increases are accelerating poverty and daily hardship among working people, particularly vulnerable demographics such as women, the elderly, and the youth. The Takaichi administration's economic growth path, built on fiscal expansion, is further stoking this inflation.

The centerpiece of the Takaichi administration's anti-inflation measures, originally framed as "zeroing the consumption tax on food items for two years," was finalized in a Cabinet decision on August 5 as "lowering the consumption tax on food items to 1% for a limited two-year period starting April 2027." However, the Nikkei Shimbun, speaking for the mainstream bourgeoisie, severely criticized the move in an editorial on August 6 following the decision, writing that "dogmatically insisting on campaign promises from the Lower House election to force through tax cuts laden with side effects and risks is nothing short of a foolish policy that will leave trouble for the future." The Nikkei editorial cited several reasons for its opposition: "it is utterly irresponsible to decide on tax cuts first while postponing the securing of alternative funding sources—amounting to 5 trillion yen annually—until the end of the year," "the effect as a measure against rising prices is limited," and "tightrope fiscal management risks driving further yen weakness and interest rate hikes, ultimately threatening the livelihoods of the public." Even the Nikkei points out that this policy fails to address the ongoing poverty and economic distress.

To defend living standards, we have advocated for the abolition of the consumption tax—funded through higher taxation on large corporations and the wealthy—along with radical wage increases, particularly a significant, nationally uniform hike in the minimum wage. However, the government has substantially delayed the target timeline for raising the national average minimum wage to 1,500 yen per hour, seeking to maintain its policy of wage suppression for non-regular workers.

Unite the Movement Against the Takaichi Administration's Military Expansion and Constitutional Revision with the Defense of Working People's Livelihoods—Build a Surge Toward Eco-Socialism

Against the Takaichi administration's moves toward military expansion and constitutional revision, major protest actions have developed on a scale not seen since the 2015 Security Legislation protests. Beginning with the "Emergency Action Against War" outside the National Diet—initiated after the general election primarily by youth and women, which grew with every gathering and spread nationwide—events like the monthly 19th "NO WAR! Don't

Change the Constitution! Main Gate Diet Action" (co-hosted by the "Overriding Action Executive Committee Against War and Destruction of Article 9" and "NO to Article 9 Amendment! National Citizens' Action") have mobilized large numbers of participants, alongside coordinated nationwide actions on the same day. To sustain and develop the momentum of this movement, we must build up grassroots actions at the local level and commit our full efforts toward that end. In particular, building solidarity with the anti-base movement in Okinawa and the Nansei Islands—where rapid militarization and base construction are underway—as well as opposition movements against SDF base expansions across the country, is indispensable.

At the same time, we must oppose the Takaichi administration's policies that prioritize the interests of big capital and the wealthy, building a movement to defend the livelihoods of the broad working populace as a battle to revitalize the trade union movement. Crucial to this struggle is the process through which workers organize themselves, raising demands such as a nationally uniform minimum wage, a substantial increase in the minimum wage, wage indexation to inflation, and halting further deregulation of labor laws, including the Labor Standards Act.

These struggles for anti-war peace, the defense of working people's livelihoods, and the fight for climate justice in the face of a deepening climate crisis are unfolding in response to the multifaceted crises of the capitalist system. As these crises converge into a single unified front, our movements and struggles must likewise interconnect to form a powerful, single stream. The current situation demands nothing less.

24 August 2026

Translated by the author from the weekly [Kakehashi](#).

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