
STRATEGIC ASSESSMENT · SPACE POLICY

Japan's Orbital Rearmament

A Strategic Assessment of the 4th Basic Plan for Space Policy

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This assessment applies the classical frameworks (Mackinder, Mahan, Spykman, Waltz) and the enrichment lenses — constructivist, game-theoretic, historical-analogy — as working instruments, not as objects of explanation. Method definitions are assumed and cross-referenced separately; they are not rehearsed in the text. (Each framework is listed, with a link to its full definition, under Analytical Frameworks at the end of this report.)

The Question, and the Answer

Japan has made security the explicit first priority of its space programme for the first time in the agency's history. The 4th Basic Plan for Space Policy (December 2023), the standing-up of the Space Operations Group, and the restructuring of JAXA from a civilian science body into a dual-use national instrument together mark the fastest reorientation of a constitutional democracy's space posture in the post-Cold War era.¹ The strategic question is whether this produces genuine autonomous capacity, or whether it deepens Japan's dependency on the United States — arming Tokyo while binding it more tightly into an alliance architecture it does not control.

The answer that emerges from every analytical lens is the same, and it is worth stating before the argument that supports it: **space is the domain in which Japan can build the most military capability at the least constitutional, normative, and alliance cost — which is precisely why the reorientation is structurally permanent, and why “autonomy versus alliance” is the wrong frame.** Japan is not choosing between the two. It is buying autonomy in the narrow domains where autonomy is cheap and useful (sovereign navigation, indigenous reconnaissance) while deepening integration where the alliance supplies legitimacy and shared cost (lunar architecture, space situational awareness). The result is a hybrid equilibrium that is rational, durable, and — this is the unstable part — dependent on continuous coordination it does not yet have.

What follows does not re-prove that thesis four times. The executive judgments below are the answer; the body of the report is the *analysis underneath the answer* — the geography, the power balance, the identity politics, the strategic games, and the historical patterns, each given the room to develop fully. A reader who wants only the conclusion can stop at the judgments. A reader who wants to know *why each judgment holds, where it is firm, and where it rests on inference* should read on.

Key Judgments

1. **The reorientation is permanent, and four independent lenses converge on that conclusion.** Realist analysis supplies the geographic logic; constructivism supplies the normative mechanism; game theory supplies the strategic rationality; historical analogy supplies the precedent. When four methods that share no assumptions reach the same finding, confidence is high. This is the firmest judgment in the assessment.
2. **Japan's geography is the asset everything else multiplies.** The archipelago is not adjacent to the First Island Chain — it *is* the northern segment of it. Every space investment (reconnaissance, navigation, domain awareness) is a force-multiplier on a geographic advantage Japan already holds. Remove the geography and the space programme loses its strategic logic.

¹ JAXA, “Sustainability Report 2024” (Phase 4 Medium/Long-Term Plan — space security as first priority), *Japan Aerospace Exploration Agency*, September 2024. https://global.jaxa.jp/about/iso/pdf/JAXA_2024_e.pdf

3. **The autonomy–alliance tension is being managed by domain differentiation, not resolved.** Autonomy where it is cheap (PNT, indigenous ISR); integration where it is subsidised (Artemis, SSA). The differentiation works only if the domains stay coordinated; the early evidence that Japanese reconnaissance is developing “in isolation” is a warning that they may not.
 4. **Alliance dependency is irreducible regardless of how much autonomy Japan buys.** Sea-lane protection, deterrence credibility, and the sheer power differential with China cannot be closed by orbital capability. Autonomy here is a matter of degree, never of kind — and any framing that implies Japan could stand alone misreads the structure.
 5. **2025–2032 is the danger window.** Capabilities are funded and institutionally locked in but not yet operational. That gap creates the one genuinely destabilising dynamic in the whole picture — a closing-window incentive for Chinese pre-emption — and it is also the judgment that rests on the least verifiable ground, because it turns on Chinese risk assessment that open sources cannot read.
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Part I — The Geographic Foundations

Geography is where this analysis has to begin, because every other lens ends up pointing back to it. Japan is an archipelagic state of four main islands and more than 6,800 smaller ones, strung 3,000 km along the western Pacific rim, with the sixth-largest exclusive economic zone on earth wrapped around a land area that is 73% mountainous. The terrain constrains ground infrastructure but offers elevation for radar and tracking; the maritime position does almost everything else.

The decisive fact is that the island chain is a physical lock on China's access to the open Pacific. The Ryukyu chain and the contested Senkaku/Diaoyu Islands sit astride the corridors the People's Liberation Army Navy must transit to reach blue water. This is not a matter of degree but of position, and it is worth setting out the chokepoints individually, because they are not interchangeable:

Corridor	Role	Control	What space adds
Miyako Strait	Primary PLAN egress to the Western Pacific; ~250 km between Okinawa and Miyako	Japanese sovereignty, operationally contested	Persistent reconnaissance and precision navigation make this corridor transparent and targetable
Taiwan Strait	~130 km; a Chinese seizure of Taiwan breaches the First Island Chain	Contested — de facto independent, claimed by Beijing	The pivot of the whole architecture; Japan's reconnaissance investment is explicitly contingency-shaped for it
Tsushima Strait	Russian and northern PLAN route to the Pacific	Japanese/South Korean control	Covered by space domain awareness, but secondary to the southern chokepoints
Senkaku/Diaoyu	Territorial flashpoint; ongoing coast-guard and militia intrusion	Japanese administration, Chinese claim	The closest trigger for a Japan–China clash; early warning and evidentiary documentation
South China Sea SLOCs	A large share of Japan's energy imports transit here	Contested; militarised artificial islands versus freedom-of-navigation operations	Japan cannot defend these lanes alone — the irreducible source of alliance dependency

Two of these entries carry the entire strategic story. The Senkaku/South China Sea (SCS) line is Japan's deepest vulnerability:² an insular economy with minimal domestic energy or minerals, dependent on sea lanes that run through the one stretch of water it cannot hold without allied naval power. No quantity of orbital capability closes that gap; it is the structural

² "Remote Control: Japan's Evolving Senkakus Strategy," *Asia Maritime Transparency Initiative (AMTI)*, CSIS. <https://amti.csis.org/remote-control-japans-evolving-senkakus-strategy/>

floor under every “autonomy” claim in this report. The Taiwan Strait line is the opposite — Japan’s single greatest point of leverage, because the archipelago’s position makes Japanese territory indispensable to any Western Pacific defence. Geography hands Japan both an irreplaceable role and an inescapable dependency, and the 4th Basic Plan is, at bottom, an attempt to maximise the first without being able to escape the second.

The latitude range of the home islands (24–45°N) is a quieter geographic asset worth naming: it gives Japan access to a wide spread of orbital inclinations from domestic launch sites, which matters for a state now treating sovereign access to orbit as a strategic requirement rather than a commercial convenience.

Part II — The Structural Power Balance

The four classical lenses are not four separate readings to be weighed against each other. They are four instruments trained on the same object, and the analytically useful work is in seeing where they reinforce one another and where they pull apart. A one-line verdict for each is sound as far as it goes, but the reasoning underneath them is where the assessment actually lives.

Mackinder — the Outer Crescent and the inverted advantage

Japan sits in the Outer Crescent, on the maritime periphery of the World-Island, separated from the Eurasian landmass by narrow seas. It cannot project power into the Heartland — it has no continental option at all — and the conventional reading would make that a position of weakness against a continental power with strategic depth. The inversion is this: China's ambition to become a maritime power requires transit through chokepoints Japan controls, which flips the Heartland advantage in the naval domain. Orbital reconnaissance is the modern mechanism of that denial. It lets Japan watch and target across maritime approaches far beyond terrestrial radar range, converting a fixed geographic position into persistent domain awareness. Mackinder's lens explains *why the Japanese build concentrates on awareness and access-denial rather than force projection* — it is the only strategic contribution an Outer Crescent state can make, and space maximises it.

Mahan — the sea-power scorecard in full

The full scoring, not just the composite, is where the judgment is actually earned:

Element	Assessment	Score
Geographic Position	Commanding position astride Chinese Pacific egress; access to both Pacific and continental seas	5
Physical Conformation	Extensive coastline, multiple deep-water ports, dispersed island basing — but vulnerable to concentration of force	4
Extent of Territory	Small land area, massive EEZ (Exclusive Economic Zone); sufficient for maritime defence, insufficient for strategic depth	3
Population	124 million and declining; ageing demographics constrain manpower; high technical education offsets	3
National Character	Strong maritime tradition and world-class shipbuilding, set against a post-1945 pacifist culture	3
Government Character	Sustained political commitment to naval and now space modernisation	4

The composite — 22 of 30, roughly 3.7 out of 5 — tells a specific story: strong sea-power fundamentals held down by two things, demographic decline and normative restriction on power projection. The trajectory is upward, because the 2022 defence package and the 4th Basic Plan are precisely a government decision to maximise maritime-aerospace leverage *despite* the population constraint. And this is the crux of Mahan's relevance: space fills the exact gap the scorecard exposes. Japan scores 5 on position and 4 on conformation but only 3 on population — it has the geography and the coastline but not the manpower. Reconnaissance satellites, sovereign navigation, and space domain awareness are how a shrinking, ageing maritime power substitutes technology for the sailors and ships it cannot field. The two low scores that pull the composite down — population, and the national-character constraint of pacifism — are the two scores that read more as inference than as hard measurement, which is worth noting but does not move the composite far.

Mahan is the dominant lens for this case, and the reason is concrete rather than thematic: every headline investment maps onto a Mahanian element extended into orbit. The JPY 280 billion ISRT constellation is maritime surveillance; QZSS is navigation for maritime and standoff operations; space domain awareness, tracking over 27,000 objects, protects the orbital infrastructure the fleet now depends on.³⁴ (The ISRT figure rests on a single think-tank source and should be read as well-attested rather than confirmed.)

Spykman — the indispensable flank, and the bound it imposes

Japan is not itself a Rimland state; it is the offshore anchor on the Rimland's eastern flank, structurally analogous to Britain's role on the western flank of Eurasia. That makes it irreplaceable to any strategy for preventing Chinese domination of East Asia — and it is the cleanest explanation for *why Washington encourages a remilitarisation that history might have made it wary of*.⁵ A weakly defended Japan is a Rimland gap; the United States would rather have a strong, even semi-autonomous Japan than a hole in the containment line. But the same logic sets the ceiling on Japanese autonomy: a flank anchor needs a hegemonic sponsor, and the role only has value inside the alliance it anchors. Spykman gives Japan its leverage and its leash in a single move.

Waltz — three levels of analysis

³ Nanae Baldauff, "Japan, Space Security, and Defense Buildup: Perspectives from Recent Strategies," *ISPI (Istituto per gli Studi di Politica Internazionale)*, 7 October 2025. <https://www.ispionline.it/en/publication/japan-space-security-and-defense-buildup-perspectives-from-recent-strategies-218125>

⁴ Government of Japan, "Protecting Space Security: A New Mission for Japan's Self-Defense Forces" (Space Operations Group tracking over 27,000 objects), *JapanGov (Kizuna)*, 2 August 2024. https://www.japan.go.jp/kizuna/2024/08/protecting_space_security.html

⁵ "U.S. welcomes Japan's pledge to boost defense spending," *The Asahi Shimbun (AJW)*, 16 January 2026. <https://www.asahi.com/ajw/articles/16288868>

The structural-realist reading works across three levels, and each carries its own distinct weight.

System level. Polarity is in transition, from American unipolarity toward US–China bipolarity, with no certainty whether the transition stabilises or breaks. The space domain mirrors this precisely: the Artemis Accords versus the China-led International Lunar Research Station is bloc formation in embryo.⁶ The structural pressure on a regional great power in this environment is unambiguous — declining credibility of extended deterrence under nuclear parity pushes allies toward self-help, and space is the lowest-friction form self-help can take.

State level. This is where the “why space, specifically” question is answered. Article 9 formally renounces war potential, but a sequence of reinterpretations — collective self-defence in 2014, counter-strike doctrine in 2022 — has expanded military scope without formal amendment.⁷ Orbital capability fits this accommodation because it reads as less provocative than kinetic force. The bureaucratic capacity to execute is high (the JAXA restructuring is evidence of how fast Japan can reorganise when political will exists), but so is the friction: the Science Council’s resistance to defence research and a 32nd-place global ranking in digital competitiveness are real constraints on the reconnaissance-to-decision chain.^{8,9}

Individual level. PM Sanae Takaichi, in office since late 2024, has stated explicitly that Japan’s military could intervene over Taiwan — a rhetorical threshold no predecessor crossed.¹⁰ But the honest reading subordinates her agency to structure: the China threat, the alliance’s burden-sharing demands, and demographic decline would push *any* Japanese premier toward this trajectory. Takaichi accelerates the timeline and raises the ceiling on what can be said aloud; she does not originate the direction. This is the level of the analysis where individual-agency claims should be held most loosely, since they are the hardest to separate from the structural current they ride.

Where the lenses agree, and where they don’t

⁶ “China and India’s National Strategy and Competition in Cislunar Space,” *The Diplomat*, December 2025. <https://thediplomat.com/2025/12/china-and-indias-national-strategy-and-competition-in-cislunar-space/>

⁷ Manoj Joshi, “Japan’s Rearmament: Technology, Deterrence, and Alliance Dependence,” *Observer Research Foundation (ORF)*, 18 December 2025. (The naval-comparison table discloses research assistance from Google Gemini; the 400–500 Tomahawk quantity requires independent confirmation.) <https://www.orfonline.org/expert-speak/japan-s-rearmament-technology-deterrence-and-alliance-dependence>

⁸ Kousuke Saitou, “Japan’s Science Council reform deepens academic–government rift,” *East Asia Forum*, 26 September 2025. <https://eastasiaforum.org/2025/09/26/japans-science-council-reform-deepens-academic-government-rift/>

⁹ Miki Matsuo, “Unaddressed Challenges for Defense Policy Reform in Japan” (Japan ranked 32nd in global digital competitiveness, 2023), *CSIS (Center for Strategic and International Studies)*, 9 May 2024. <https://csis.org/analysis/unaddressed-challenges-defense-policy-reform-japan>

¹⁰ Manoj Joshi, “Japan’s Rearmament: Technology, Deterrence, and Alliance Dependence,” *Observer Research Foundation (ORF)*, 18 December 2025. (The naval-comparison table discloses research assistance from Google Gemini; the 400–500 Tomahawk quantity requires independent confirmation.) <https://www.orfonline.org/expert-speak/japan-s-rearmament-technology-deterrence-and-alliance-dependence>

The convergence is the strong finding. All four lenses identify Japan's geographic position as the foundation of its strategic value; all four agree that space is the lowest-friction path for Japanese rearmament; and all four agree that alliance dependency is irreducible — Mahan through sea-lane reliance, Spykman through the flank-anchor logic, Waltz through the raw power differential. When the instruments agree this completely, the conclusion is robust.

The divergences are not failures of the analysis; they are the genuine dilemmas Japanese planners actually live inside. Mahan implies Japan's geographic indispensability *guarantees* alliance reliability — Washington cannot abandon the northern anchor without losing the Pacific. Waltz counters that shifting polarity could redirect American attention regardless of Japan's value, and the finding that Japanese reconnaissance has developed “mostly in isolation” from US systems may be an early symptom of exactly that drift.¹¹ (That isolation claim is contested — it appears to hold for reconnaissance while cooperation remains strong in space situational awareness, so both readings can be true in different domains.) And Mackinder's Outer Crescent logic says *maximise autonomy* to preserve freedom of action if the configuration shifts, while Spykman's Rimland logic says *maximise integration* because the Rimland contest is what determines outcomes. Japan's dual-track strategy tries to satisfy both — and that attempt, rather than any single lens, is the real subject of the next two parts.

¹¹ Sean Wilson, “Next Steps for the U.S.-Japan Space Alliance,” *CSIS (Center for Strategic and International Studies)*, 9 April 2025. <https://csis.org/analysis/next-steps-us-japan-space-alliance>

Part III — Identity and Norms

Realist analysis establishes that Japan is *under pressure* to arm. It cannot, on its own terms, explain why the arming *succeeds domestically* — why a society with deeply embedded pacifist norms accepts a security-first space programme without the political rupture the same investment in ground forces would provoke. That is a question about identity and legitimacy, and it is the part of the analysis too easily reduced to a single phrase (“technology-security identity”). The mechanism deserves more, because it is load-bearing: weaken it and the political coalition for the 4th Basic Plan weakens with it.

Three identities competing for the same state

Japan is mid-transition between three self-conceptions, and the politics of the Basic Plan are the politics of which one prevails.

- **The peace state** (the Yoshida legacy):¹² Article 9, pacifist norms, a civilian-only space agency. Dominant since 1947 and still institutionally embedded in academia, civil society, and parts of the bureaucracy.
- **The normal great power** (the Abe–Takaichi trajectory): a state with forces commensurate with its economic weight and threat environment. Operationalised by the 2022 defence package, the counter-strike doctrine, and the renaming of the Air Self-Defense Force to the Air and Space Self-Defense Force.
- **The technology-security state** (emerging): a state that derives security from technological superiority rather than force mass — the Space Strategy Fund, the JAXA reorientation, the SLIM precision landing.

The third identity is the one that matters strategically, because it *resolves* the conflict between the first two. Space militarisation succeeds precisely because it can be filed under technology and innovation rather than under military power. The same capability, framed as a tank, collides head-on with the peace state; framed as a satellite and a research fund, it slips past. This is not spin — it is the actual normative machinery that keeps the rearmament coalition intact.

The normative landscape

The transition is legible as a set of norms at different stages of their life cycle:

¹² Kelly, “The Yoshida Doctrine and Japan’s pacifist legacy,” *Wisconsin International Law Journal*.
<https://wilj.law.wisc.edu/wp-content/uploads/sites/1270/2012/02/kelly.pdf>

Norm	Stage	Status in Japan	Strategic consequence
Pacifism / Article 9	Eroding, not replaced	Formally intact, progressively reinterpreted since 2014	A legitimacy ceiling on overt militarisation — which space is designed to pass under
“Peaceful use” of space	Redefined	2008 Basic Space Law shifted “peaceful” from <i>non-military</i> to <i>non-aggressive</i>	The legal foundation for dual-use was laid 15 years ago; the Basic Plan operationalises it
Academic distance from military funding	Eroding	Science Council moved from opposition (2015) to qualified acceptance (2022)	The barrier is weakening; the Space Strategy Fund routes around what remains
Responsible space behaviour	Cascading internationally	Japan positions as a norm champion via Artemis and SSA cooperation	Norm entrepreneurship supplies legitimacy cover for capability-building
Alliance solidarity	Internalised	Embedded in strategic culture since 1952	Constrains autonomy; makes US disapproval a genuine normative sanction

The single most important entry is the second. The constructivist inflection point in this whole story is not 2023 — it is **2008**, when the Basic Space Law redefined the “peaceful use” of space from *non-military* to *non-aggressive*, opening the legal space for dual-use.¹³¹⁴ Everything since is implementation of what the normative landscape already permitted. Reading the 4th Basic Plan as a transformation mistakes the operational moment for the constitutive one.

Norm entrepreneurship and the relationships it shapes

Japan is not merely accommodating norms; it is actively shaping them, on two tracks. By promoting the Artemis Accords — as a founding signatory and the largest allied hardware contributor — it helps set the rules for cislunar governance while drawing domestic legitimacy from association with a rules-based, cooperative order. And by housing military space capability inside a civilian agency rather than a separate military command, it normalises a dual-use template that other constitutionally constrained democracies could copy.

The relationships this produces can be read in their underlying character. Japan–US is a friendship structure — deeply institutionalised, norm-sharing, interoperable — but with pockets of rivalry around intelligence sovereignty, which is what the reconnaissance-isolation finding actually signals. Japan–China is degrading from rivalry toward something closer to

¹³ Setsuko Aoki, “Challenges for Japan’s Space Strategy,” AJISS-Commentary No. 34, Japan Institute of International Affairs (JIIA), 26 June 2008. https://www.jiia.or.jp/en/ajiss_commentary/column-41.html

¹⁴ Nanae Baldauff, “Japan, Space Security, and Defense Buildup: Perspectives from Recent Strategies,” *ISPI (Istituto per gli Studi di Politica Internazionale)*, 7 October 2025. <https://www.ispionline.it/en/publication/japan-space-security-and-defense-buildup-perspectives-from-recent-strategies-218125>

enmity, visible in both rhetoric (the Taiwan-intervention statements) and capability (reconnaissance explicitly shaped for the Taiwan Strait). Japan–India is an emerging friendship¹⁵ built through shared projects — the LUPEX lunar rover, the 2+2 dialogues — though without the institutional depth of the US alliance. The trajectory of the China relationship is the one to watch, and it should be read as inference rather than established fact: it is being *constructed* through narrative and signalling choices, which means it is in principle reversible, even as the current direction is unmistakable.

The perception gap that makes this dangerous

The most dangerous element here is not a capability but a perception asymmetry. Japan's self-image is a defensive technology-security state building resilience. China's likely perception is a remilitarising former imperial power embedding itself deeper into US containment. The reconnaissance constellation that Tokyo reads as defensive awareness, Beijing will read as an offensive enabler for the counter-strike doctrine — because, transparently, it is oriented at the Taiwan Strait and the Senkakus. A secondary gap runs inside the alliance: Japanese autonomy that Tokyo intends as strength, Washington may read as hedging. Both gaps are structural, not rhetorical, and neither closes with better messaging.

¹⁵ "India–Japan Space Collaboration: TMT, LUPEX, Astronomy, Exploration," *Japan Calling*.
<https://www.japancalling.in/post/india-japan-space-collaboration-tmt-lupex-astronomy-exploration>

Part IV — The Strategic Games

Where constructivism explains why the rearmament is *legitimate*, game theory explains why it is *rational* — and, more usefully, why it is rational *regardless of what China actually intends*. Three formal games sit beneath the rearmament logic. Each is a distinct strategic structure with a distinct lesson.

Game 1 — Autonomy versus alliance, with the United States

The first game is the one the whole report orbits. Japan chooses between maximising autonomy and maximising integration; the United States chooses between encouraging Japanese autonomy and demanding integration. The payoff structure is a coordination problem with conflicting preferences:

	US encourages autonomy	US demands integration
Japan maximises autonomy	Best for Japan; US keeps an allied contributor but loses control	Friction: autonomy against US wishes, interoperability suffers
Japan maximises integration	Japan integrates deeply; best for the US; Japan loses independent options	Over-integration: Japan wholly dependent, deterrence brittle if US wavers

This is a Battle-of-the-Sexes structure: both sides prefer coordinating to not coordinating, but they disagree on *which* coordinated outcome. Japan prefers autonomy-with-US-encouragement; the United States, under normal conditions, prefers integration — but shifts toward encouraging autonomy as its own burden-sharing pressures rise. The 4th Basic Plan's real move is to dodge the corners of this matrix entirely by *differentiating by domain*: autonomous in navigation and reconnaissance, integrated in lunar architecture and domain awareness. The reconnaissance-isolation friction is not a contradiction of the deep cooperation elsewhere — it is Japan playing a mixed strategy, autonomous in one sub-domain while integrated in another.¹⁶ The risk is that a mixed strategy held without tight coordination decays into incoherence, which is the substance of Key Judgment 3.

Game 2 — Deterrence, with China

The second game explains why the ISRT constellation faces no serious domestic opposition despite its scale. Japan chooses to build reconnaissance capability or to restrain; China chooses to accelerate its Taiwan timeline or hold the status quo. From Japan's side the structure is a Prisoner's Dilemma in which **building is a dominant strategy**: if China

¹⁶ Benjamin Rimland, "U.S.-Japan Cooperation on Tactically Responsive Space: Near-Term Capability and Long-Term Alignment," *CSIS (Center for Strategic and International Studies)*, 11 September 2024. <https://csis.org/analysis/us-japan-cooperation-tactically-responsive-space-near-term-capability-and-long-term>

accelerates, Japan needs the surveillance to survive the contingency; if China holds, the capability deters future coercion by raising its cost. The investment is rational even in a world where the threat never materialises, because its mere existence alters Beijing's calculus. That is the cleanest available explanation for why a JPY 280 billion programme draws no real opposition — there is no Chinese behaviour against which it is the wrong move.

The sting is in the mirror image. The same capability that stabilises deterrence from Tokyo's side compresses Beijing's window of opportunity, which creates a pre-emption incentive. The payoff-dominant outcome is (Build, Status Quo), but the structure contains a path to (Build, Accelerate) — mutual defection — if China comes to believe the window is closing.

Game 3 — Cislunar coalitions, with everyone else

The third game is different in kind: a coordination game with network effects, played over Artemis versus the ILRS among Japan, China, and a set of non-aligned states (India, ESA members, Gulf states). The value of either framework rises with its membership — more partners mean more shared infrastructure, data, and legitimacy. Japan, as a founding Artemis signatory with the largest allied hardware stake, cannot credibly defect: the sunk costs and identity commitments are too high. Its strategic role is therefore to *thicken the Artemis network* — recruiting signatories (61 and counting)¹⁷ and demonstrating capability through SLIM, HTV-X, and Gateway contributions — so that the framework's pull on undecided states grows. India is the pivotal undecided actor, participating in both tracks, and the outcome turns on demonstrated capability as much as on diplomacy.

Commitment, credibility, and the closing window

Underneath all three games sits a credibility problem common to democratic defence commitments: how does a government bind its successors? Japan's answer is costly institutional signalling. The JAXA reorganisation, the force renaming, and above all the counter-strike doctrine are far harder to reverse than budget lines, and they signal to both Washington (Japan is serious) and Beijing (this is locked in regardless of who governs in Tokyo). The record FY2026 defence budget — 9.04 trillion yen, the twelfth consecutive record — reinforces the signal.¹⁸

But the most consequential game-theoretic dynamic is also the most speculative judgment in this report, and it should be flagged as such. As Japan's reconnaissance, navigation, and counter-strike capabilities mature toward the 2030s, the cost to China of any coercion rises — which front-loads the incentive to act *before* maturity, during the 2025–2032 funding-but-

¹⁷ NASA, "The Artemis Accords" (Oman became the 61st signatory on 26 January 2026), *National Aeronautics and Space Administration*, 2026. <https://nasa.gov/artemis-accords>

¹⁸ Kosuke Takahashi, "Japan Approves Record Defense Budget for Fiscal Year 2026" (9.04 trillion yen, twelfth consecutive record), *Naval News*, 30 December 2025. <https://www.navalnews.com/naval-news/2025/12/japan-approves-record-defense-budget-for-fiscal-year-2026/>

not-yet-operational gap. The institutional lock-in is partly designed to defuse this by signalling that the window will close no matter what, deterring adventurism in the interval. Whether that signal lands depends on Chinese strategic culture and risk tolerance — factors outside Japan's control and largely outside open-source visibility. This is the one place in the assessment where the analysis is reasoning about an adversary's private risk calculus, and the conclusion should be held accordingly.

Part V — Historical Patterns

The final lens asks whether other constitutional democracies have walked this road, and what their experience predicts. Three source cases carry most of the weight; the comparisons that make analogy more than allusion are worth running in full, not in passing.

West Germany's Bundeswehr (1955–1965) — the strong analogy

A defeated, constitutionally constrained state (Basic Law Article 26 bars wars of aggression)¹⁹ rearmed within a decade under direct Soviet threat, embedded in NATO, having to overcome deep pacifist sentiment and reinterpret its constitution to legitimate what would otherwise read as unilateral militarisation. The parallels run across the dimensions that matter most:

Dimension	West Germany (1955)	Japan (2023)	Strength
Constitutional constraint	Basic Law Art. 26	Article 9	Strong
Proximate threat	Soviet divisions in the East	PLAN expansion, Senkaku intrusions, Taiwan contingency	Strong
Alliance embedding	NATO as legitimisation	Artemis Accords and the US bilateral alliance	Strong
Domestic pacifist opposition	<i>Ohne Mich</i> , SPD opposition	Science Council resistance, pacifist opinion	Strong
Rearmament framing	“Defence contribution” within an alliance	“Space security” within a dual-use frame	Strong

What the analogy predicts: constitutional accommodation (reinterpretation rather than amendment) will succeed, because it mirrors Bonn’s method exactly; pacifist opposition will moderate under sustained threat, as the SPD’s did at Bad Godesberg in 1959 and the Science Council’s did in 2022; and the resulting force will tilt toward alliance integration over independent capability. But the analogy also carries the report’s sharpest cautionary lesson — the Bundeswehr became *strategically inert without its alliance patron*, optimised for NATO command and incapable of independent operation. If Japan follows the pattern unaltered, its space capabilities end up optimised for US interoperability at the expense of autonomous utility. The evidence that Japan has *learned* this is the QZSS programme: a deliberate investment in sovereign navigation of a kind the Bundeswehr never possessed. The analogy is strong precisely because Japan appears to be using it as a warning rather than a template.

¹⁹ “German Basic Law, Article 26 (bar on wars of aggression),” *Centre for Conflict, Atrocity and Genocide Studies (CIAD), University of Nottingham*. <https://ciad.nottingham.ac.uk/en/state/56/keyword/533/>

France's Force de Frappe and CNES (1960–1975) — the moderate analogy

France, distrusting the US nuclear umbrella, built an independent deterrent and converted its civilian space agency into a dual-use institution — the Diamant launcher derived directly from military missile technology — while staying in NATO's political structure even as it left the integrated command.²⁰ The reading this unlocks is the most useful single idea in the historical part: **QZSS is Japan's functional Force de Frappe**. Not a nuclear weapon — the Three Non-Nuclear Principles foreclose that — but a sovereign capability that operates inside the alliance in normal times and supplies independent options if alliance credibility degrades. GPS-independent navigation is to Japan what autonomous deterrence was to France: the hedge that makes the alliance a choice rather than a necessity at the margin. H3 plays the role Ariane played — sovereign access to orbit, validated by the October 2025 HTV-X1 launch.²¹ The analogy is only moderate because France's nuclear path produced *genuine* strategic independence, which Japan's geography and threat profile make impossible; Japanese autonomy will always be domain-specific rather than comprehensive.

India's ISRO (2014–present) — the moderate, and forward-looking, analogy

India's transition of ISRO toward dual-use after its 2019 ASAT test and the standing-up of a Defence Space Agency²² runs closely parallel to JAXA's: civilian-to-dual-use agency transformation, precision lunar landing as a dual-use demonstration (Chandrayaan-3 alongside SLIM), and regional navigation systems (NavIC alongside QZSS). The forward-looking inference is that Japan and India are on *converging* institutional trajectories — two democracies building military space capability through civilian-agency restructuring rather than dedicated military commands. The Japan–India axis (LUPEX, 2+2 dialogues, complementary PNT) may become the most consequential bilateral space-security relationship in the Indo-Pacific after the US alliance itself. The analogy is moderate because the strategic contexts differ sharply — India faces Pakistan and a continental border, and has no Article 9 — so the institutional convergence should not be over-read as strategic alignment.

The cross-case finding

The pattern that holds across all three is the one that matters: **no constitutional democracy has reversed a civilian-to-dual-use space-agency transformation once the institutional restructuring is done**. West Germany, France, India — in each, the transformation proved a

²⁰ "The Origin of the French Nuclear Weapons Programme (Force de Frappe)," *The Nuclear Weapon Archive*. <https://nuclearweaponarchive.org/France/FranceOrigin.html>

²¹ NASA/JAXA, "NASA, JAXA to Cover HTV-X1 Spacecraft Departure from Space Station" (HTV-X1 launched aboard H3 Flight 7, October 2025), *National Aeronautics and Space Administration*, 2025. <https://www.nasa.gov/news-release/nasa-jaxa-to-cover-htv-x1-spacecraft-departure-from-space-station/>

²² "Exploiting Indian Military Space," *Centre for Joint Warfare Studies (CENJOWS)*, December 2025. https://cenjows.in/wp-content/uploads/2025/12/Layout_Exploiting-Indian-Military.pdf

ratchet. JAXA's November 2025 organisation chart, with dedicated Security and Information Systems and Space Strategy Fund departments, is exactly the kind of structural lock-in the pattern identifies.²³ This is what lets historical analogy converge with the other three lenses on permanence — and it is a well-grounded convergence, not a speculative one, because it rests on a consistent empirical record rather than on a forecast.

²³ JAXA, "Organization Chart (November 2025)" — Security and Information Systems and Space Strategy Fund departments, *Japan Aerospace Exploration Agency*, November 2025.
https://global.jaxa.jp/about/org/pdf/org_e.pdf

Part VI — Why Three Independent Lenses Agree

The single most important property of this assessment is not any one finding but the *triangulation* behind the headline judgment. The permanence of Japan's reorientation is asserted by four methods that share no premises:

- **Realism** says it is permanent because the geographic and structural pressures are permanent — China is not leaving, the demographics are not reversing, and the power differential is not closing.
- **Constructivism** says it is permanent because the enabling normative shift (2008's redefinition of "peaceful" from non-military to non-aggressive) is already complete and the technology-security identity is self-reinforcing.
- **Game theory** says it is permanent because the institutional commitments are costly and deliberately hard to reverse, which is the whole point of making them.
- **Historical analogy** says it is permanent because no comparable democracy has ever reversed the transformation.

Four lenses, no shared assumptions, one conclusion. That is why the permanence judgment is offered with high confidence and the transition-window judgment with much less: the first is over-determined by independent lines of evidence, while the second hangs on a single thread — Chinese risk perception — that none of the four lenses can actually observe. Reading the confidence of a finding *off the convergence of methods behind it* is the discipline this report is built to make visible.

The Outlook — Strategic Implications

For Japan. The most urgent task is closing the reconnaissance interoperability gap before domain-differentiated autonomy hardens into structural isolation; the mixed strategy of Game 1 only pays off if the domains stay coordinated rather than siloed. The QZSS expansion to eleven satellites is the single highest-value autonomy investment, because sovereign navigation has utility across every domain and hedges against both alliance degradation and Chinese electronic warfare.²⁴ And the digital-competitiveness gap is a binding constraint on the whole reconnaissance-to-strike chain: sensors without AI-enabled processing produce surveillance without decision advantage.

For the United States. The counter-intuitive but well-founded conclusion is that Japanese autonomy *strengthens* the alliance — the French precedent shows that allied autonomy reduces free-riding and raises collective capability. Trying to constrain Japanese reconnaissance independence would drive it further into the isolation that CSIS already flags.²⁵ The priority is to integrate Japanese reconnaissance into combined targeting architectures *before* operational maturity in the 2030s, to avoid two incompatible intelligence pictures of the same battlespace.

For China. The institutional lock-in means the reorientation is not reversible through engagement, economic pressure, or a change of government in Tokyo — a diplomatic strategy aimed at weakening Japanese resolve will not move the structural trajectory. The 2025–2032 window is the period of maximum instability, and the danger is specifically one of *misreading*: Japan's costly signals are designed to demonstrate irreversibility, and a Beijing that reads them as bluff rather than commitment is the scenario in which the deterrence game tips to mutual defection.

For India and Indo-Pacific partners. The convergence of Japanese and Indian trajectories — lunar cooperation, complementary regional navigation, parallel agency transformations — is the most promising route to reducing collective dependency on any single alliance architecture. Non-aligned states face the cislunar coordination game directly: the payoff of joining either framework rises with membership, and Japan's demonstrated capability is actively thickening the Artemis side of that calculus.

²⁴ Yusuke Watanabe and Koji Ishikawa, "Japan's Basic Policy 2025 Strengthens Space Industry" (QZSS expansion to eleven satellites), *Greenberg Traurig, LLP (via Mondaq)*, 29 July 2025. <https://www.mondaq.com/government-contracts-procurement-ppp/1654370/japans-basic-policy-2025-strengthens-space-industry>

²⁵ Sean Wilson, "Next Steps for the U.S.-Japan Space Alliance," *CSIS (Center for Strategic and International Studies)*, 9 April 2025. <https://csis.org/analysis/next-steps-us-japan-space-alliance>

Limitations

The classical frameworks were built for terrestrial geography; extending them to orbit (LEO as littoral, cislunar as Rimland, the lunar surface as resource Heartland) is illuminating but imprecise, and Waltz's levels of analysis travel into the orbital domain more cleanly than Mackinder's or Mahan's spatial metaphors do. The most consequential evidentiary caveats are specific and worth stating plainly rather than burying: the JPY 280 billion ISRT figure rests on a single think-tank source;²⁶ the 400–500 Tomahawk quantity comes from a source that discloses AI-assisted research and needs independent confirmation;²⁷ the “developed in isolation” reconnaissance claim is contested and probably domain-specific;²⁸ and the SLIM landing precision is reported inconsistently (10 m versus 55 m) even within JAXA's own materials.^{29,30} None of these undermines the structural argument, but a professional reader is entitled to know where the load-bearing numbers are thin.

The deeper limit is the one that recurs through the report: Chinese strategic intentions on the Taiwan timeline are fundamentally opaque from open sources, and the closing-window analysis rests on assumptions about Beijing's risk calculus that cannot be empirically verified. The assessment assumes broad policy continuity in Tokyo, sustained Chinese military expansion, and US commitment to the Indo-Pacific at roughly current levels. Excluded from scope, and each capable of altering the picture: cyber and undersea warfare, economic interdependence as a brake on conflict, the North Korean missile threat as a competing claim on Japanese resources, and the fiscal sustainability of record defence spending under demographic decline. The structural reading is most robust over the medium term of five to fifteen years; beyond 2035, demographic, technological, and polarity uncertainties compound past the point where this kind of analysis should claim confidence.

²⁶ Nanae Baldauff, “Japan, Space Security, and Defense Buildup: Perspectives from Recent Strategies,” *ISPI (Istituto per gli Studi di Politica Internazionale)*, 7 October 2025. <https://www.ispionline.it/en/publication/japan-space-security-and-defense-buildup-perspectives-from-recent-strategies-218125>

²⁷ Manoj Joshi, “Japan's Rearmament: Technology, Deterrence, and Alliance Dependence,” *Observer Research Foundation (ORF)*, 18 December 2025. (The naval-comparison table discloses research assistance from Google Gemini; the 400–500 Tomahawk quantity requires independent confirmation.) <https://www.orfonline.org/expert-speak/japan-s-rearmament-technology-deterrence-and-alliance-dependence>

²⁸ Sean Wilson, “Next Steps for the U.S.-Japan Space Alliance,” *CSIS (Center for Strategic and International Studies)*, 9 April 2025. <https://csis.org/analysis/next-steps-us-japan-space-alliance>

²⁹ JAXA, “Conclusion of Lunar Activities of the Smart Lander for Investigating Moon (SLIM)” (landing precision ~10 m), *Japan Aerospace Exploration Agency*, 26 August 2024. https://global.jaxa.jp/press/2024/08/20240826-1_e.html

³⁰ Susumu Miyahara, “SLIM月面着陸成功の意義” (press-conference figure of 55 m, with 3–4 m image-navigation accuracy), *KPMG Japan*, 29 January 2024. <https://kpmg.com/jp/ja/home/insights/2024/01/slim-lunar-exploration.html>

Analytical Frameworks

This assessment applies the following methods as working instruments; their definitions are not rehearsed in the text but are maintained separately and in full at spacestrategies.org.

- **Realist Power Analysis** — Mackinder, Mahan, Spykman, and Waltz frameworks for power dynamics in space competition. <https://spacestrategies.org/articles/realist-power-analysis/>
- **Constructivist Analysis** — how norms, identities, and shared beliefs shape state behaviour in the space domain. <https://spacestrategies.org/articles/constructivist-analysis/>
- **Game Theory** — modelling strategic interactions between space actors with formal payoff structures. <https://spacestrategies.org/articles/game-theory/>
- **Historical Analogy Method** — structured parallels between historical precedents and current strategic challenges. <https://spacestrategies.org/articles/historical-analogy-method/>
- **Geopolitical Risk Framework** — political instability, interstate escalation, and sovereignty disputes affecting space programmes and partnerships. <https://spacestrategies.org/articles/geopolitical-risk-framework/>