

Japan and the Second Trump Administration

日本と第2期トランプ政権
RIETI Webinar – 20 November 2024

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The Trump Risks

- The most fundamental issue for Japan – and other US allies – is uncertainty
- While the president-elect’s views on some key issues (tariffs, allied contributions) are known, his transactional style, factionalized GOP (and even Trumpworld) politics, and priorities are harder to discern
- The range of potential outcomes for Japan is significantly greater than with a “normal” US administration
- It is also a different Trump from 2016: less of a learning curve, less constrained by traditional GOP, more cohesive movement with loyalists prepared to assume posts from the beginning



Potential scenarios for Japan

- **Trump 1.0 redux:** perhaps some discomfort – Japanese companies hit with tariffs, Japanese government is pressured to provide more host-nation support, and pledge more defense spending – but China hawks in the administration and Congress, recognizing Japan’s indispensability, shield Japan from more disruptive outcome
- **The dealmaker:** Trump pursues grand bargains with Putin, Xi, Kim, freeing him to weaken security guarantees to allies (and Taiwan) and take tougher approach in trade, security talks with Japan and other allies
- **Troubles at home:** Trump’s domestic priorities – mass deportations, etc. – lead to civil unrest, tension between federal and state governments, weakening reliability of US security guarantees regardless of the administration’s foreign policy decision making



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Managing Trump 2.0

- As Ishiba pursues a meeting with the president-elect, there is hope that he can use the Abe “playbook”
- Is this realistic? How well did it work the first time?
- Ishiba is not Abe: different style of leader, more insecure domestically, more constrained in bargaining power
- 2024 Trump is not 2016 Trump: less constrained, more confident, more prepared
- A Trump strategy: leverage broader DC relationships; more deliberate hedging (external + internal balancing, independent diplomacy with Beijing and others)
- Brace for tail risks and be ready to adapt