More Weapons than Windmills: Japan's Military and Energy Policy Response to Russia's Attack on Ukraine

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ABSTRACT	Russia's attack on Ukraine was a shock to both the international security architecture and global energy markets. This article examines Japan's response to these shocks. It finds that the Ukraine War spurred dramatic policy changes in Japan's defense policy, but only moderate ones in its energy policy. The war has so far had a particularly weak impact on Japan's green transition despite the potential renewable energy has for Japanese energy security. We argue that the main reason for the discrepancy between Japan's responses in the defense field and energy field is found in its increasingly strong tendency to securitize "the China threat". Strengthening Japan's defense policy as a response to Russia's aggression is seen by Japanese policymakers as compatible with counterbalancing China. However, a full-blown transition to renewable energy is not, due to the Japanese fear of becoming further trade-dependent on China, which dominates renewable energy markets.

KEYWORDS	Japan, crisis, Ukraine war, energy, military, defense, securitization
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INTRODUCTION

Russia's invasion of Ukraine in February 2022 was a shock to the system – both the international security architecture and energy markets. As the biggest military conflict in Europe since the end of World War 2, it has brought NATO members closer together in a marked shift from when French President Emmanuel Macron decried the "death of NATO" in 2019 (THE ECONOMIST 2019). The security concerns are not limited to Europe, but also reverberate in Asia. Japanese Prime Minister Kishida Fumio (2023) has repeatedly stressed that *"Ukraine may be the East Asia of tomorrow".* In the field of traditional military security, Japan's response culminated in the dramatic decision to double Japan's defense spending by 2027 and acquire enemy base strike capabilities (TATSUMI 2023).

Given that Russia is one of the largest producers and exporters of oil and gas, its actions in Ukraine also sent shockwaves through international energy markets with *"potentially serious implications for international energy security"* (IEA 2022A). In the wake of the attack, oil and gas prices skyrocketed, which is a challenge in particular for energy import-dependent countries like Japan. In the years before the Russian attack, Japan relied on Russia for approximately seven percent of its total fossil fuel imports (METI 2022). Globally, the energy crisis *"has sparked unprecedented momentum for renewables"* as concerns about energy security led many countries to strengthen their renewable energy policy to increase the share of domestically produced electricity (IEA 2022B).

The Ukraine War has thus posed a major challenge for Japan in the defense field and the energy field. However, as we will show, Japan's responses to the war have been starkly different in the two fields. In the defense field, we have seen language and action of such a dramatic nature that it should be labeled as a case of securitization. In the energy field, however, there has been little change, especially when it came to the green transition. Since Russia's actions have been framed as both a military and an energy threat, it is pertinent to ask why securitization has only taken place in Japan's defense policy and not in its energy policy. We argue that this discrepancy can be explained by "the China factor". The securitization in the defense field complements Japan's strategy to counter the rise of China – an increasingly important Japanese objective – while securitization in

the energy field does not. This is because policymakers in Tokyo fear that a mass-scale transition to renewable energy could increase Japan's trade dependence on China, which dominates many of the renewable energy markets. We conclude by presenting some policy recommendations and point out that Japanese concerns about a possible increase in trade-dependence on China are somewhat overblown in the case of renewable energy.

SECURITIZATION

Shock events, such as wars, accidents or economic crises, challenge the credibility of existing institutions and policies. By spotlighting deficiencies in existing structures, they create a window of opportunity for change (CAPOCCIA – KELEMEN 2007). It is not given, however, that a shock event translates into a fundamental policy change during critical junctures. Radical change depends on key actors' perception of the crisis at hand and their ability to mobilize support for new ideas. In times of crises, policymakers often resort to a tactic known as "securitization" – the framing of a problem as so urgent that extraordinary policy measures must be taken. Hence, a successful securitization transforms a window of opportunity into a radical reorientation of policy.

The originators of securitization theory, the so-called Copenhagen School, argue that securitization consists of the following steps. First, since security issues are often not self-evident, a securitizing actor must perform a speech act in which s/he frames a certain object as an existential threat that requires an imminent response. Typically, the speech act will be along the lines of *"If we do not tackle this problem, everything else will be irrelevant (because we will not be here or will not be free to deal with it in our own way)"* (BUZAN – WÆVER – DE WILDE 1998: 24). As Ralf Emmers (2016: 172) notes, in contrast to realism's focus on the material nature of the threat, the constructivist securitization approach focuses on how an issue is *"made to be perceived as a threat"*. According to this view, threats do not objectively manifest themselves, but must, in a sense, be spoken into being. The speech act is therefore intended to convince a relevant audience of a threat that necessitates extraordinary measures. In democracies the relevant audience is typically the voters, who provide policymakers with political mandates to act. Second, if the speech act is accepted by the relevant audience, the securitizing actor implements extraordinary measures *"outside the normal*

bounds of political procedure" (BUZAN – WÆVER – DE WILDE 1998: 24). Such extraordinary measures differ in accordance with the nature of the threat, but they are typically considered rather extreme responses that would not be possible under normal circumstances.

In the following, we demonstrate that although Russia's actions were framed as both a military and an energy threat by Japan, the corresponding Japanese securitization only took place in the defense field while the response in the energy field has been far more restrained.

JAPAN'S DEFENSE POLICY RESPONSE TO THE UKRAINE WAR

Japan has undertaken a radical reform of its defense policies in the wake of the Ukraine War. The lack of popular opposition to these radical measures suggests that we are dealing with a successful case of securitization. It is important to note that the process of defense securitization in Japan had been underway for several years in response to the heightened threat perceptions vis-à-vis China (HAGSTRÖM – HANSSEN 2016). However, Russia's invasion of Ukraine greatly intensified Japan's defense securitization. Japan's National Security Strategy (NSS), released in December 2022, made 15 references to "Russia" as compared to only one in the previous NSS released in 2013. The document describes Russia's attack on Ukraine as an event that *"shakes the very foundation of the international order"*. Russia's attack on Ukraine is not primarily framed as a direct threat to Japan's security, but rather as an indirect one in the sense that Russia's aggression erodes the rule of law and might induce a similar aggression by China in Japan's vicinity. This fear is evident in the document's argument that *"[t]he possibility cannot be precluded that a similar serious situation may arise in the future in the Indo-Pacific region, especially in East Asia"*. It concludes that the breakdown of the rule of law coupled with the aggressive behavior by Japan's neighbors, ensures that *"Japan's security environment is as severe and complex as it has ever been since the end of World War II"* (CABINET SECRETARIAT 2022).

The securitization in the defense field has not been limited to speech acts by the defense establishment. Importantly, it has also been accompanied by some rather extraordinary measures in Japan's actual defense policy. Most notably, in November 2022, the Kishida Fumio government decided to double Japan's defense spending by 2027. This decision breaks

Japan's long-standing policy of limiting the defense budget to one percent of the GDP. By raising defense spending to two percent of the GDP, Kishida is overturning a key principle in Japan's defense policy and will likely propel Japan to third place on the list of military spenders. The increased budget will naturally enable the acquisition of new weapons systems. The most controversial of these is the planned acquisition of cruise missiles that would give Japan the ability to launch counterstrikes against bases on enemy territory. This is a breach, although not the first, of Japan's post-war policy of not possessing so-called offensive weapons, i.e. weapons with power projection abilities. According to one expert, these changes represent *"the biggest turning point in the history of the country's security and defence policy after World War II"* (TSURUOKA 2023).

This means that in the defense field, Russia's war in Ukraine has greatly intensified an already ongoing securitization effort. This securitization has manifested itself in both dramatic speech acts and extraordinary measures – the hallmarks of securitization.

JAPAN'S ENERGY POLICY BEFORE THE UKRAINE WAR

Such securitization has been largely absent in the energy field. Japan is notoriously resource-poor, making it highly dependent on energy imports to cover its industrial and household needs. The oil crises in the 1970s badly hurt Japan's economy and initiated a pursuit of energy security that continues to this day. Nuclear energy has long been promoted as the ideal energy source to meet the country's needs (METI 2010), but all of its nuclear power plants were shut down after the 2011 Fukushima nuclear disaster, and the country's energy self-sufficiency rate plummeted to an all-time low of 6.3 percent in 2014 (METI 2022). Nuclear reactor restarts were severely slowed down by the increase in technical safety costs and social acceptance costs that resulted from the nuclear safety reforms after 2011 (KOPPENBORG 2021). This presents a major obstacle to Japan's nuclear power-reliant energy security strategy. The share of nuclear power has hovered between four and seven percent in the past few years, trailing far behind the share of 20–22 percent which the government seeks to achieve by 2030. The gap resulting from the sluggish nuclear reactor restarts has been filled with additional fossil fuel imports.

Due to an increase in renewable energy production and the restarts of some nuclear power plants, Japan's energy self-sufficiency rate rose to 12.1 percent in 2019, but this is still one of the lowest energy self-sufficiency rates among the major economies. Taking a closer look at Japan's electricity generation in 2019, oil, coal and gas accounted for a combined share of 76 percent of all electricity generated in the country. The introduction of a feed-in tariff for renewable energy in 2012 spurred substantial growth in the installed capacity of renewable energy. Consequently, renewables accounted for 18 percent of all electricity generation in 2019 (METI 2022). In 2020, the then Yoshihide Suga government announced the goal of achieving carbon neutrality by 2050 and subsequently raised the renewable target share for 2030 to 36–38 percent in the 2021 Strategic Energy Plan.

Despite the perennial pursuit of energy security, Japan's energy mix still makes it highly dependent on fossil fuel imports. This situation is exacerbated by the sluggish nuclear reactor restarts, which have worsened Japan's energy import dependence conundrum.

JAPAN'S ENERGY POLICY RESPONSE TO THE UKRAINE WAR

Before the invasion of Ukraine, Russia accounted for 3.6 percent of Japan's oil imports, 8.8 percent of its liquefied natural gas (LNG) imports, and 11 percent of its coal imports (METI 2022). Under pressure from Europe and the US, Japan has taken some steps to decouple from the Russian energy market. In April 2022, Japan declared its intention to gradually phase down its imports of Russian coal and oil, and in December, Japan joined the G7 nations in implementing a price cap on Russian crude oil. By the end of 2022, Japan had reduced its Russian oil and coal imports by 56 and 41 percent, respectively, compared to the prior year. However, Japan's LNG imports from Russia actually increased by four percent in 2022 (EURACTIV 2023). Furthermore, Japan decided to maintain its Russian oil and gas imports from the Sakhalin projects, in which Japanese companies have placed considerable investments. Unlike the United States and many European countries, it has largely refrained from using the Ukraine War as an opportunity to lessen its energy import-dependence and hasten its transition to domestically produced renewable energy.

Even though Japan was not as reliant on Russian fossil fuels as some of the European countries, it has still suffered massively from the global increase in oil and gas prices. This impact has been exacerbated by the historically weak yen. In July 2022, Prime Minister Kishida underscored the challenge to Japan's energy security posed by Russia's invasion of Ukraine: *"We are currently facing an extremely tense situation, with the risk of the first energy crisis since the oil shock in 1973"* (KISHIDA 2022). While such language comes close to a securitization speech act, Japan has been slow to follow it up with commensurate action.

The Green Transformation (GX) Roadmap, adopted as official government policy on February 10, 2023, essentially has three objectives: first, to provide a plan for Japan to achieve its Paris Agreement goal of reducing emissions by 46 percent by 2030 (compared to 2013 levels) and reaching carbon neutrality by 2050; second, to alleviate the current energy crisis; third, to create a strong link between industrial and energy policy so that the green transformation can stimulate economic growth.

Concretely, the roadmap places particular emphasis on nuclear power. To revive Japan's ailing nuclear power program, the roadmap proposes a) an extension of the lifespan of existing nuclear power plants and b) the construction of next-generation nuclear power plants. The former is achieved by discounting years in shutdown from the number of allowed operating years. This effectively enables the plants' operation beyond the designated upper limit of 60 years. Kishida has also pushed hard for the construction of "next-generation nuclear power plants" as part of his energy strategy, even though this next-generation technology is not yet market-ready and will thus not have any immediate impact on the current energy situation. The push for operation extensions and new nuclear power plants marks a shift from the ambiguity on this matter exhibited by Kishida's predecessors (KOPPENBORG 2023). Kishida's willingness to tamper with nuclear regulations has, however, raised questions about the government's commitment to nuclear safety, including unusually blunt criticisms from one of the Nuclear Regulation Authority's scientists (NHK 2023).

In addition to the renewed focus on nuclear power, the GX roadmap aspires to accelerate the introduction of renewable energy. Since renewable energy presents a safe way to achieve the twin goals of lessening

energy import-dependence and reducing CO_2 emissions, any full-blown securitization of Japan's energy policy would have to include a push toward a green transition. The roadmap does indeed contain the objective of *"making renewable energy the main power source"*. While this sounds promising, concretely, the roadmap does little more than rehashing the 2021 Strategic Energy Plan's target of a 36–38 percent renewable energy share by 2030. Since that plan's envisioned energy mix also contains a 41 percent fossil fuel share, it is clear that the roadmap, despite its promises, will not make renewable energy Japan's "main power source", but rather seeks to make renewable energy a supplement to the real main power source, which continues to be fossil fuel.

Hence, the biggest problem with the roadmap's environmental vision is that it further locks in Japan's reliance on fossil fuels. The roadmap heavily promotes hydrogen and ammonia as well as carbon capture and storage (CCS) technology as a way of reducing CO_2 emissions from fossil fuel power plants. However, these technologies only have a limited CO_2 reduction potential and will likely serve as a justification for the construction of more fossil fuel power plants, including highly polluting coal plants. This lock-in effect is also why the plan has been heavily criticized by virtually every major environmental organization in Japan (SEE JAPAN BEYOND COAL 2023 FOR A SUMMARY).

Overall, the newest roadmap is largely old wine in new bottles. Japan thus failed to use the shock of the Ukraine War as an opportunity for securitizing its energy policy so that it would lead to a massive, society-wide transition to renewable energy and away from fossil fuel. Perhaps with the exception of a renewed focus on nuclear power, including a government attempt to water down nuclear safety standards, Japan's energy response to Russia's invasion of Ukraine has been devoid of extraordinary measures. This is unfortunate because it is estimated that the results will fall seven to 12 percent short of the nuclear power targets for 2030 (KOPPENBORG 2023). This will reinforce the future reliance on imported fossil fuels and thus demonstrates why a wholehearted transition to renewable energy is the best option to alleviate both Japan's perennial energy-dependence problem and its CO_2 emission challenge.

THE CHINA FACTOR

As we have seen, the Japanese securitization in wake of the Ukraine War has been significant in the defense field, but not in the energy field. The reason for this discrepancy, we argue, is found in Japan's growing concerns about the Chinese hegemony in East Asia. While for many years after the end of the Cold War, Japan had high hopes for a peaceful coexistence with China, the increasing tensions in the bilateral relationship since approximately 2010 have turned such hopes into concerns about a possible economic or even a military conflict. In the early 2000s, then Prime Minister Koizumi Junichirō (2001–2006) stressed repeatedly that China's rise was not a "threat" but an "opportunity" for business and cooperation (HANSSEN 2021 [2020]: 165–166). This stands in stark contrast to how China is framed by the Japanese Government today. The 2022 National Security Strategy, for example, describes China's actions as *"a matter of serious concern for Japan and the international community, and present an unprecedented and the greatest strategic challenge in ensuring the peace and security of Japan and the peace and stability of the international community"* (CABINET SECRETARIAT 2022: 9).

This increased threat perception has, as already mentioned, spurred Japanese securitization moves in the defense sphere. Controversial moves such as allowing collective self-defense and the acquisition of offensive weaponry such as F-35 fighter jets and small aircraft carriers, were undertaken primarily to counter the perceived China threat. North Korea's development of nuclear weapons has of course also contributed to these securitization moves. But as Hagström and Turesson (2009) point out, it could be credibly argued that the North Korea threat has functioned as a "perfect excuse" for military securitization moves that are in reality aimed at China, which is seen as the far greater threat, but is also more difficult to explicitly label as such given its economic, political and military clout. In other words, the main driver of Japan's military securitization is the rising threat perception vis-à-vis China.

Russian aggression lends itself to Japanese defense securitization because, just like in the case of North Korea, Russia's aggressive conduct can justify military measures by Japan that fit neatly into its grand strategy of countering the China threat. That is to say, the defense measures against Russia complement Japan's securitization of China. Regardless of whether

Japanese policymakers actually feel that Russia is a direct threat to Japan or not, if Russia's dramatic attack on Ukraine can help justify a doubling of defense spending in the eyes of the public, policymakers see this as an opportunity to bolster Japan's defense securitization of China. In fact, in the wake of the outbreak of the Ukraine War, we have seen attempts by the Kishida government to link the threats from Russia and China. This is especially clear in the 2022 National Security Strategy, which both frames Russia's *"strategic coordination with China"* as a *"strong security concern"*, and warns that *"a similar serious situation [as the Ukraine War] may arise in the future in the Indo-Pacific region, especially in East Asia"* (CABINET SECRETARIAT 2022: 10, 2), which is a thinly veiled reference to a potential Chinese invasion of Taiwan. This framing allows policymakers to respond to the shock of Russia's aggression against Ukraine by taking countermeasures against China since the two threats are deemed as closely linked. In that sense, Russia too has become a "perfect excuse" for Japanese policymakers to securitize the China threat. It is this complementarity between the Russia threat and the China threat that has enabled such a rapid securitization in Japan's defense field since Russia's attack on Ukraine.

This complementarity is absent in the energy sphere, however. A seemingly ideal solution to Japan's energy-dependence on foreign countries in general and Russia in particular, would be a mass-scale transition to renewable energy and away from fossil fuels. However, the fear in Japan is that a renewable transition would increase Japan's trade-dependence on China and make Japan's energy policy vulnerable to the whims of the Chinese Communist Party, which is an outcome that is highly incompatible with a strategy of counterbalancing China. This is the main reason, we argue, that external shocks such as the Ukraine War have had only a limited potential to spur an energy securitization of the renewable variant in Japan.

A mass-scale transition to renewable energy could happen through imports of manufactured equipment from foreign countries or through the development of a world-leading renewable energy industry on the domestic level. But both these approaches are likely to increase Japan's trade-dependence on China, which is something recent Japanese leaders have tried desperately to avoid.

First, importing ready-made renewable energy modules from abroad, would make it difficult to avoid China because China dominates many of the renewable energy markets and can often offer the cheapest prices. For example, when it comes to solar panels, a market Japan dominated in the 1990s, China today holds a 74 percent global market share in this industry (HATTORI – CHEN 2021). China is also by far the biggest market for wind turbines with almost 40 percent of their global onshore installations (GLOBAL WIND ENERGY COUNCIL 2021: 50). A cost-effective strategy based on importing ready-made renewable energy modules and hardware would therefore almost inevitably lead to increased imports from China, which controls the key markets. However, as Cabinet Office Vice Minister Wada Yoshiaki recently warned, *"if[...] we import components from China, that is not really a secure way to generate power"* (NORDIC INNOVATION HOUSE TOKYO 2022: 27:23–27:35).

Second, Japan could alternatively try to build up a world-leading domestic renewable energy industry, but this too is difficult to do without increasing Japan's trade-dependence on China. The reason is that this would require access to massive quantities of resources for the production of solar cells, windmills, batteries, etc. Since Japan is notoriously resource-poor, most of these resources would have to come from foreign suppliers. This option raises concerns that a wider transition to renewable energy would further increase Japan's reliance on Chinese imports (METI OFFICIAL 2023). Avoiding Chinese suppliers is, of course, possible, but only if Japan is willing to forego the often cheaper prices of Chinese resources. For example, when it comes to blue and green hydrogen, Song et al. (2021) have demonstrated that China could provide Japan with both quantities and prices that more than match Japan's specified targets for 2030 and 2050. China is also the world's largest producer and exporter of steel and rare earth minerals, both of which are essential for production of renewable energy hardware. This means that avoiding Chinese resources would entail a far higher price tag on a Japanese plan to reinvigorate the domestic renewable energy industry.

Both an increase of hardware imports and an increase of resource imports would almost necessarily lead to increased trade-dependence on China. It is therefore easy to understand why Japanese policymakers, who are becoming increasingly hawkish on China, have not expressed the same enthusiasm for renewable energy securitization as they have for defense

securitization in the wake of the Ukraine War. The latter securitization effort is compatible with the major objective of preventing Chinese hegemony in East Asia, and the former is not.

CONCLUSION

Russia's invasion of Ukraine was perceived as creating formidable military and energy challenges for Japan. The war constituted a window of opportunity for policy change in both the defense and energy field, but securitization was only carried out in the former. The defense field has seen both dramatic speech acts and the implementation of extraordinary measures that would have been difficult to carry out before the war. The energy field, on the other hand, has seen few strong speech acts and even fewer measures that can be characterized as extraordinary. Japan's energy response has mainly consisted of rehashing existing renewable energy targets while seeking to increase nuclear power generation and locking in fossil fuel utilization for decades to come through the allure of techno-fixes such as ammonia and CCS.

In this paper we have argued that the discrepancy between these responses can primarily be explained by the China factor. While the securitization in the defense field complements Japan's strategy to constrain China's growing power in East Asia, energy securitization of the renewable variant does not.

The reason is that China dominates many of the markets that Japan would have to tap into if it were to get serious about a green transition. Hence, any large-scale shift to renewable energy will evoke concerns about Chinese supply chains. When it comes to both renewable energy hardware and the resources needed to create such hardware, China can often offer the cheapest prices. While many components can be bought from non-Chinese suppliers, some degree of dependence on cheap Chinese suppliers is probably unavoidable as long as the profit-seeking business side is expected to drive the green transition. This presents Japan with a green transition dilemma: either buy Chinese and increase Japan's trade-dependence on China, or forego the Chinese market and buy expensively elsewhere. For policymakers and industrialists in Japan, neither option is particularly

attractive. The unfortunate consequence is that Japan resists phasing out fossil fuels and fails to play up to its potential in the green transition.

We would, however, argue that the fear of becoming vulnerable to Chinese export stops is somewhat exaggerated when it comes to renewable energy. Unlike fossil fuel imports, which permanently need to continue when the product is spent, hardware and resources for renewable energy can be used for a long time once they have been imported. Even if Japan were to import the majority of the necessary hardware and resources from China, once they would be in place, they would work regardless of China's export policies. A renewable energy supplier cannot hold other countries politically hostage in the same way a fossil fuel supplier can.

For several reasons, the China factor should not be allowed to perpetually serve as a Japanese excuse to postpone the green transition. First, Japan is the world's fifth largest greenhouse gas emitter and its current energy transition plans to retain a 41 percent share of fossil fuels in its electricity supply by 2030 are incompatible with its goal of cutting emissions by 46 percent by the same year. Second, it is risky for the government to bet on nuclear power in a situation where increased technical safety costs and social acceptance costs have complicated nuclear plant restarts (KOPPENBORG 2021). Failed restarts would result in a scenario where Japan would need to produce more than the planned 41 percent of its electricity from fossil fuels. This would continue to exacerbate Japan's energy import conundrum. It would also put Japan at odds with commitments made under the Paris Agreement and, more recently, at the G7 Energy and Climate Ministers Meeting, where Japan committed to a *"fully or predominantly decarbonized power sector by 2023"* (MOE 2023).

Thus, to meet the dual challenge of decarbonizing energy generation and increasing energy security, the Japanese Government should increase its support for the domestic renewable energy industry. Japan's technological and manufacturing strengths should be mobilized for the production of competitive renewable energy hardware that can be installed across the Japanese landmass and at sea. With an almost 30,000 km long coastline, Japan has a huge untapped potential for offshore wind power. According to the International Energy Agency, the maximum power potential of Japan's offshore wind is more than 9000 TWh of energy per year, which

constitutes approximately nine times its current electricity demand (IEA 2019: 70). A lack of shallow waters complicates the implementation of this idea, however, as deep waters typically require more technologically unproven floating turbines, so it will be difficult for Japan to reach its full potential in this respect. But even a fraction of Japan's full wind power potential would go a long way to turn the green transition into reality. Japan should immediately begin utilizing its vast and largely untapped potential for offshore wind power generation.

Although the shock of the Ukraine War failed to speed up the green transition in Japan, it is not too late for the country to embark on a more ambitious path toward carbon neutrality. This would require a long-term strategy to reinvigorate the country's renewable energy industry and a firm resolve to once and for all phase out fossil fuel. We are hopeful that the winds of change will also reach Japan's shores.

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