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Geopolitics around Taiwan and three Proposals for Japan's Energy Policy

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Summary

For the first time in her history, China, historically a land power, is strengthening its regional presence at sea. Her hard-liner stance, such as occupation of the Spratly Islands, has raised anti-Chinese sentiment in the region, and the group of sea power nations along the first island chain is strengthening its defense system. Now that China is poised to unify Taiwan as her historical inevitability, there is a growing possibility that it will actually use force within the next few years. To counter Chinese military expansion, Japan has decided to strengthen its military power. I suggest, in addition to this, a drastic enhancement of energy security is an urgent issue. I offer three proposals for Japan: 1) reinforce energy stockpiling and infrastructure defense, 2) strengthen oil and gas imports from the U.S., and 3) revise the self-defeating zero carbon policy.

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1 Geopolitics around Taiwan

The geopolitics surrounding Taiwan will be explained based on historical background, primarily from the perspective of China. With the unification of Taiwan by China becoming an urgent concern, it is important to secure the sea lanes of Japan, the other major regional power, in order to deter it.

China's maritime expansion

Historically, China was a continental nation. That is, the Han Chinese (漢民族) had enormous population, resources, and economic power due to their agriculture on the fertile plains of the Yellow River and Yangtze River Basin, and had little interest in overseas territory. China was repeatedly invaded by peripheral nations from the north and west, but these were continental nations, such as the nomads of Mongolia and the hunter-gatherers of Manchuria.

Historically, China had little interest in the oceans. Although there was an undertaking in the Ming dynasty, the Great Expedition of Zheng He (鄭和), this was only a transitory event. Moreover, its purpose was not to establish overseas colonies, but merely to make a show of force. In fact, immediately after this expedition, the Ming Dynasty decided to close herself off from the rest of the world.

Although trade with Japan and Ryukyu and other countries through the oceans was conducted, official trade was so-called tribute trade (朝貢貿易), not an exchange of equivalent goods. As a Qing emperor stated, China was so rich and overflowing with goods that there was no need for trade, and this was in fact true. The surrounding nations offered curious tribute, and in return, the emperor bestowed lavish gifts upon them. In other words, the tribute trade was positioned as a way for the neighboring nations, who came to the emperor out of love for his virtues, to receive alms from the benevolent emperor. The tribute trade was very lucrative, partly due to the existence of an accompanying monopolistic trade, and the neighboring nations were happy to pay tribute.

It was not until the modern era that China began to find significant interests in the oceans, symbolized by the Opium War of 1840, which led to the colonial partition of China by powers such as Great Britain, Germany, France, Russia, and Japan, many of which invaded China from the sea. In 1930s and 1940s, China was invaded by Japan. Again, the route was from the sea. After the establishment of the People's Republic of China, the country faced the threat of the U.S. during and after the Korean War, and in preparation for that attack, she located its industries inland, such as in Chongqing.

With the end of the Cultural Revolution in 1992 and the arrival of Deng Xiaoping to promote reform and opening up, the industrial development of China's coastal areas was modeled after Hong Kong, which had been a British territory, and China's coastal areas became the world's factory. China's economy became heavily dependent on trade. China now imports resources from, and exports industrial products to, all of the world. Saudi Arabia's number one crude oil export partner is now China, and the UAE profits from the transit trade that carries Chinese industrial products throughout Africa.

China began asserting its territorial claims in the South China Sea in 2009, and during the Obama administration, taking advantage of the weakness of the accommodating U.S. response, China moved into the Spratly Islands around 2015, increasing its effective control. In 2016, the Permanent Court of Arbitration (PCA) in The Hague, the Netherlands, ruled that China's territorial claims were baseless, but China has ignored this ruling and stepped up its offensive. China has been able to do as it pleases and not be punished because of its economic power and the size of the country. However, this has resulted in opposition from neighboring countries such as the Philippines, Vietnam, Malaysia, and Brunei.

The South China Sea is a major artery of maritime traffic essential to world trade in manufacturing and high-tech industries goods. [Up to 40% of Japan's trade and 90% of South Korea's trade passes through the South China Sea.](#) If disputes escalate in the South China Sea, trillions of dollars in annual trade would be at stake.

Even if China gains effective control of the South China Sea, so-called The First Island Chain covers the Pacific Ocean like a lid when viewed from China, and Chinese vessels cannot enter the Pacific Ocean without passing through that strait somewhere. This is a geopolitical constraint for China (Figure 1).



<https://ja.wikipedia.org/wiki/%E7%AC%AC%E4%B8%80%E5%88%97%E5%B3%B6%E7%B7%9A>

Fig. 1 First and Second Island Chain

China's "Peaceful Rise" and Transformation in the Xi Jinping Administration

This section describes how China came to act as a challenger to the liberal camp. After the collapse of the national economy during the Cultural Revolution, Deng Xiaoping seized power, and China began to reform and open up policy (改革開放), eventually advocating a socialist market economy (社會主義市場經濟). This was a tacit agreement with the people to allow free economic activity as long as it did not interfere with the political system of the Communist Party dictatorship. China, with its well-developed reading class and high level of knowledge historically, was able to achieve dramatic economic development by adopting Western and Japanese technology.

After the Tiananmen Square protests in 1989, China was subjected to economic sanctions, and its economic growth temporarily stagnated. However, with the collapse of the Soviet Union in 1991 and the end of the Cold War, Western countries began to harbor the utopian fantasy that China would embrace democracy if it first achieved economic growth. As is known by such phrases as "self-effacement (韜光養晦)" and "peaceful rise to power (平和的台頭)", China first had to accumulate economic power, and to do so, it had to be willing to endure humiliation. China was welcomed into the wave of globalization and was granted WTO membership in 2001 by the West. However, when Xi Jinping became president in 2013, he strengthened the communist dictatorship and began to manifest an attitude of challenging the free camp, as symbolized by the territorial expansion in the Spratly Islands and the war-wolf diplomacy that denied the oppression of Uyghur human rights.

Michael Pillsbury, in his book *China 2049*, states that this is a Chinese conspiracy and that the West has been duped (Michael Pillsbury 2015), but he is not right. In the first place, China has never officially promised that it will become a democracy when its economy grows. Not only that, but it is a recurring episode in China's history, such as the "lying in rocky bed and licking bitter guts (臥薪嘗膽)" episode, that when one is weak, one should endure humiliation and focus on building one's competence. This is a very common practice in China and does not even need to be presented as a conspiracy. The CCP has consistently been a dictatorship, denying Western-style parliamentary democracy and freedom of speech and politics.

“The Inevitability” of Taiwan's Reunification in China's View of History

China has positioned Taiwan as a "core interest (核心的利益)". She also states that she "aims for peaceful unification, but does not exclude a use of military force". Why is Taiwan such an important issue for China?

With the establishment of the People's Republic of China in 1949, China became a communist dictatorship. Since then, the Cultural Revolution and Tiananmen Square massacres have been perpetrated against its own people, and genocide is still ongoing in Uyghur, Tibet, and other regions. Once such dictatorships lose their power, they are immediately subject to reprisals by those who hold grudges against them. The executions of dictators in Eastern Europe at the end of the Cold War are just one example of this. The leaders of the Chinese Communist Party saw the abyss in the 1989 Tiananmen Square incident (Shirk 2008). A few more inches and they would have been doomed.

The Chinese Communist Party can never recognize Taiwan's independence because it can

never tolerate Taiwan being "another democratic China, run by the Chinese". It is absolutely unacceptable that an alternative to the Communist dictatorship could exist and prosper, much less criticize human rights issues within China and the legitimacy of the Communist Party. Therefore, at worst, Taiwan should be pro-China, i.e., it should not criticize the CCP. To make it sure, Taiwan should be unified under the CCP.

The above is the real intention but officially not stated. But the inevitability of Taiwan's unification is patriotically narrated in the unique Chinese view of history. In short, since China is historically one, Taiwan, as a part of China, must naturally be unified.

In the Chinese view of history, from ancient times to the present, there have been legitimate dynasties with a heavenly mandate. These are the Zhou, Qin, Han, Tang, Song, Yuan, Ming, and Qing dynasties, and the People's Republic of China. In reality, the Yuan and Qing dynasties were not Chinese ones, but Mongolian and Manchurian. China were conquered by those ethnic groups, and the native Han Chinese were severely discriminated against. In addition, the Song dynasty's territory was much smaller than that of today's China. There was also a long period of division during which many small states, including those of different ethnic groups, fought each other. However, these events did nothing to overturn the world view of the unified China centered on the Han people, the notion that "there are no two Suns in the heavens, and no two kings on earth". Ideas always trump facts, regardless of which side of the world one is on, but this is especially true of China's understanding of history.

Taiwan has historically rarely even been a part of China. Even in the Qing Dynasty, it was referred to as "land outside the sphere of civilization (化外之地)," and China did not recognize it as part of its territory. However, after Chiang Kai-shek(蔣介石), the sworn enemy of Mao Zedong, fled to Taiwan and the Republic of China (中華民國) occupied the island and achieved de facto independence, Taiwan was regarded as an indivisible territory of China that must be unified.

Early in its history, China did not have the naval power to attack across the Taiwan Strait (Yoshihara 2022). However, China's understanding of history is that Taiwan was divided from China by U.S. intervention and support for Chiang Kai-shek. This was positioned by China as another humiliation by a foreign power in the "history of humiliation since the Opium War".

Xi Jinping has announced his "Chinese Dream" vision of China becoming the world's leading economic and military power by 2049, the 100th anniversary of the founding of the People's Republic of China, and his brain, military officer Liu Mingfu (劉明福), has written, "For the United States, ending the Civil War was the foundation of its development. The unification of Taiwan is the Civil War for China, and it must be won, and this is the precondition for China's development" (Liu Ming-fu 2023).

Taiwan is now, in effect, an independent country with its own political and administrative structure. China, however, maintains that Taiwan remains a part of China. If Taiwan declares independence, China will never approve, and China has made it clear that it will not hesitate to intervene militarily. In response, a majority of people in Taiwan want to maintain the status quo, i.e., de facto independence and economic prosperity, without the risk of provoking China and starting a war. So far, there are no signs that the Taiwanese government will declare independence.

But the risk of a Taiwan contingency is growing. Xi Jinping, who has even implemented constitutional reforms in order to enter an unprecedented third term (2023-2027) as the National Major Chair (国家主席) of the country, aims to be on par with Mao Zedong, the founding father of the nation. To this end, he is seen as likely to take action to unify Taiwan during his term.

Masahisa Sato, National Defense Chairman of Liberal Democratic Party (LDP), the ruling party of Japan, known by his nickname "Captain Beard," sees the risk of a military invasion of Taiwan by the Xi Jinping administration as extremely high, based on the analysis of official Chinese documents and the positions of military personnel. He wrote that it is not a question of whether or not, but a question of when China takes actions ([Sato 2023](#)). Kenji Minemura of the Canon Institute for Global Studies adds that Taiwan unification is also a top concern of Xi Jinping himself, who worked for a long time in Fujian Province (福建省) on the other side of the Taiwan Strait, and that there is broad support among the Chinese people for Taiwan unification. According to Minemura, there is a risk that China could invade Taiwan as early as [2024](#) if the United States becomes confused over the U.S. presidential election at the end of that year ([Shi and Minemura 2023](#)). A growing number of intellectuals in Europe and the United States also see a Taiwan contingency as imminent (e.g. Brands and Beckley 2022).

Consequences of China's Annexing Taiwan

Now that China has amassed economic power, it is rapidly strengthening its military and has already established a conventional force in the Western Pacific that is capable of competing with the United States on equal or greater terms. Even so, a landing operation on Taiwan, if the U.S. military were to intervene, would likely result in defeat or, at the very least, heavy losses (Cancian et al. [2023](#)). As an alternative, the possibility of a maritime blockade of Taiwan through military exercises and inspection on the spot has been raised, in which case Taiwan would be forced to surrender in a short period of time if the U.S. military did not intervene (Minemura 2024).

In any case, what will happen if Taiwan falls into Chinese hands? First and foremost, the people of Taiwan will be unhappy. Freedom of speech and politics will be thoroughly suppressed. This is a repeat of what has already happened in Mongolia, Tibet, Uyghur, and Hong Kong. Those who have promoted democracy in particular will suffer a terrible fate. Morally, this is something that the West liberty camp cannot tolerate.

For Japan and other liberal camps along First Island Line, the direct military consequences would also be enormous. If Taiwan becomes militarized, the military balance in the Western Pacific will shift sharply in favor of China. Prime Minister Nakasone of Japan once told President Regan Japan is an "invincible aircraft carrier" in the liberal camp and invoked controversy. But at least in military terms alone, he was right.

The First Island Chain, including Taiwan and Japan is, in effect, a series of unsinkable aircraft carriers. It can be manned by land, sea, and air bases, and is a powerful means of containing the movement of the Chinese navy into the Pacific Ocean. From China's point of view, the First Island Chain leaves only a series of straits through which the Chinese navy must pass to exit to the Pacific Ocean. The shallow East China Sea to the west of the First Island Chain makes it easy for the enemies to capture submarine activities. By seizing Taiwan, China would at once be freed from this geopolitical constraint.

The eastern coast of Taiwan is deep water, and if Chinese naval bases were to be established, submarines would be able to navigate the western Pacific at will without being detected. Taiwan will also be home to a myriad of drones and missiles. This could lead to a blockade of Japanese and Korean sea lanes.

Economically, China will gain control of Taiwan's technology, such as semiconductors and electronics, and the human resources to support it. This will not only contribute to China's economic growth, but also to the modernization of its military. Taiwan now has the world's largest cutting-edge semiconductor production capacity, and if exports from Taiwan were to cease, there would be a worldwide shortage of semiconductors. The economic damage alone would be enormous (Hirai 2024).

Of course, if Taiwan were to be annexed to China, the U.S. and other countries would impose economic sanctions, but it is difficult to predict how effective these sanctions would be. It is even more doubtful that these sanctions would be effective in deterring China from unifying Taiwan. Although economic sanctions were imposed on Russia when she invaded Ukraine, and this was foreseeable, the reality is that it failed to deter Russia from invading Ukraine.

Even if sanctions against China might be seen effective in weakening the Chinese economy, Xi Jinping may be willing to risk them, as long as they do not overturn the political system and the dictator remains in power for a long time, as is the case with sanctions against Iran and North Korea. It would not be at all surprising if Xi Jinping decides that it is important to "unify Taiwan and achieve a long-held national dream since Mao Zedong" (Minemura 2024).

Finlandization of Japan

What will China do with Japan if it unifies Taiwan and China becomes more and more powerful? Japan is right next door to China, criticizing its dictatorship and thriving on democracy. Next to Taiwan, it is the second most unpleasant challenger to the legitimacy of the Chinese Communist dictatorship. Not only that, it has a military alliance with its sworn enemy, the United States, and is equipped with the military power to counter China.

The aforementioned Liu Mingfu aims to make Japan a neutral state, distanced from the United States. He wrote "By 2049, China should be a military and economic superpower, on an even footing with the United States, and Japan should be neutralized, not a vassal state of the United States."

In fact, if China's economic power increases after the unification of Taiwan, it may be able to suppress Japanese freedom of speech and politics through maneuvering (工作) activities under its influence, and finally get the Japanese government to crack down on criticism of China. Another scenario could be to incite anti-U.S. public opinion to force the withdrawal of U.S. military bases from Japan.

Such maneuvering has already been underway for a long time. China has been using its economic power and lefties in Japan to a considerable extent to advance a silent invasion (Hamilton 2018; 2020) of Japanese politics, government, business, and media, and there are already countless pro-China's in Japan. They oppose the strengthening of Japanese defense forces, U.S. military base activities, and even the development of anti-spying laws

and the promotion of nuclear power generation, and they are having a major impact on decisions regarding Japan's defense and energy policies (Yomiuri Shimbun Reporting Team 2021).

What makes this problem even more serious is that China can achieve a great deal even if it does not directly maneuver. This is because many Japanese intellectuals have traditionally been leftists, who reject liberalism and capitalism and are more accommodating to socialism and communism as the antithesis. They also regard developed countries, including Japan, as evil and developing countries as good, the victims of evil. Thus, what they say out of conviction is exactly what China wants. In short, they are what Lenin called "useful idiots". Discourses such as "Friendship with China is the most important thing, and we should not provoke China by strengthening our military forces" (e.g., Shunji Taoka 2023) are frequently seen in the major Japanese media. The journalist Kaori Fukushima has stated that the problem in Japan is that there are too many such "Friends of China (中国友好人士)" (Kaori Fukushima 2024).

In the past, Finland was under strong influence from its neighbor, the Soviet Union, and while it managed to maintain its democratic system, it [maintained a pro-Soviet neutrality](#) in politics and speech, not criticizing the Soviet Union. This kind of "Finlandization" against Japan is one of China's options. China has a motive to pull Japan away from the U.S. and make Japan pro-Chinese neutral. Furthermore, pro-China neutrality means the death of freedom and democracy for Japan, since it means restrictions on Japanese freedom of speech and politics. Deterring this Finlandization is also an important geopolitical issue for Japan.

Aversion of Military Issues Constrains Japan's Defense Capabilities

In Japan, academia and the media have traditionally been strongly left-wing liberal, and even talking about the military in public is met with a sense of refusal. This aversion to the military issues is also strong in politics and government administration, and this is the primary reason for the significant delay in the development of defense capabilities (Kanehara 2021).

In addition, the U.S. governing policy after the Pacific War was to demilitarize Japan, and this remains a strong influence to this day. Article 9 of the Japanese Constitution, drafted by the US GHQ bureaucracy in effect, prohibits war and the military. In accordance, laws related to defense have severely restricted military activities. Japan is supposed to have an "exclusive defense" ability and has been forbidden to attack. Even if an enemy attacked Japan with missiles or other weapons, it had been forbidden to launch a counterattack on the enemy's military base up to 2023.

As ancient Chinese scholar Sun-Tzu (孫子) said, "offense is the best defense," and the goal of establishing a deterrence capability without an offensive capability is nonsense. Without revision of defense-related laws, starting with Article 9 of the Constitution, Japan will not be able to defend itself against the attack of a powerful enemy. However, Japan's academia and media have been leaning to the left, and there is fierce resistance to revising Article 9 of the Constitution. The reasons for this are such that provoking China and North Korea would lead to an arms race, or the revision would end up in a return to the military superpowers of the Pacific War era. Of course, all of this is nonsense in light of the current geopolitical situation of Japan. Legal hurdle is also very high, given that a

two-thirds majority of both the House of Representatives (national lower house) and the House of Councillors (upper house) is required to revise the Constitution..

There is no multilateral military alliance of free camp in Asia based on a strong legal framework like NATO. There are only bilateral military alliances such as U.S.-Japan and U.S.-South Korea, and the Taiwan Relations Act in the United States. In recent years, some progress has been made in multilateral defense cooperation, such as Japan-U.S.-Korea joint exercises and Japan's partial participation in AUKUS. However, military cooperation between Japan, South Korea, and Taiwan, which is probably the most important in this region, have not emerged so far, because bilateral relations between Japan and South Korea have often cooled over issues such as historical perception, and China's have constantly suppressed Taiwan's efforts to strengthen military ties with other countries.

Although this too is rarely discussed publicly, if the Taiwan contingency triggers a war between Japan and China, Japan must be prepared for it to be a long-lasting asymmetric war. China has the advantage in conventional forces between Japan and China. U.S. military intervention would change this balance, but the U.S. would likely launch only a limited attack on mainland China for fear of escalation to an all-out nuclear war involving the U.S. mainland. On the other hand, China would likely launch strategic strikes against Japanese infrastructure and civilians, but Japan's Self-Defense Forces are not legally allowed to attack non-military facilities and they do not possess weapons to do it. Thus, what Japan can do at best is to "not lose" to China, but it would have no means to "win" at all. Surrendering to China would of course be unacceptable because it would mean the loss of Japanese freedom and democracy. Fortunately, there is an ocean between Japan and China, so it is not easy for Chinese forces to land on and occupy Japan, but Japan will have to endure the one-sided bombardment by the Chinese.

Securing Japan's sea lanes necessary to deter Taiwan unification

The most urgent task for the sea power nations today is to deter China from unifying Taiwan. This is because Taiwan unification cannot be overlooked for the above-mentioned moral, military, economic, and geopolitical reasons. In order to deter China, we must convince China that if China attempts to unify Taiwan, the U.S. military will surely intervene, China will be defeated, and both the Chinese Communist Party and the Xi Jinping administration will be destroyed. To this end, Japan, which will inevitably be involved in the Taiwan contingency because of its provision of bases in the event of U.S. military intervention, must not be made to believe that it will easily give in.

First, it is important to strengthen defense capabilities. This point has already been recognized at the national level, and defense spending has been increased to 2% of GDP by 2024. As part of this, Japan will deploy medium-range missiles, and the amount of arms and ammunition stockpiles are to be increased. Shelters to protect the population from missile attacks and other threats were begun.

On the other hand, it is necessary not only to secure such defense equipment, but also to ensure the supply of goods through sea lanes. In World War II, the U.S. sank most of Japan's transport ships and blocked imports of oil and other strategic goods, which was one of the reasons for Japan's defeat (Horikawa 2021). Even now, energy supply remains

an extremely fragile Achilles heel for Japan.

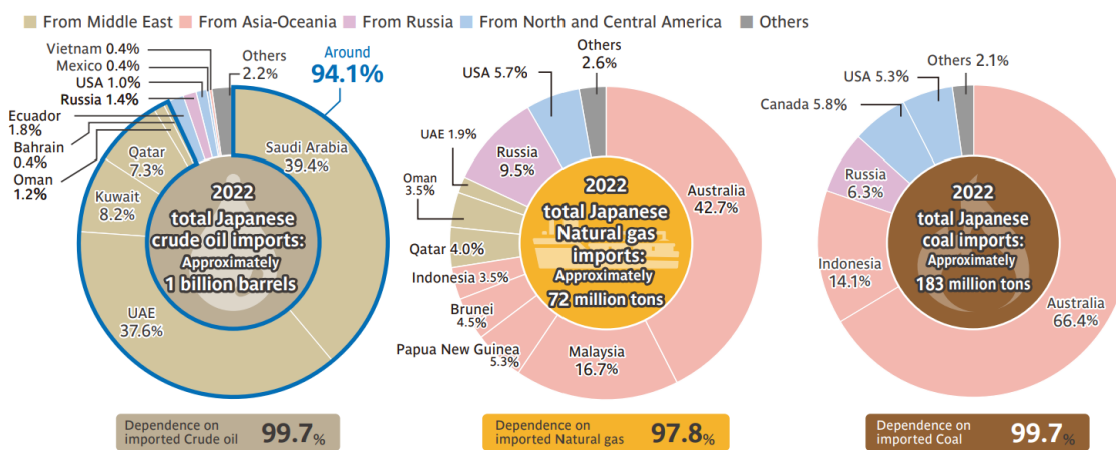
Japan's Sea Lanes and Capability to Continue the War

Like most other countries, fossil fuels are the main source of energy in Japan. And Japan relies almost entirely on imports of fossil fuels from overseas (Figure 2). This is because Japan has almost no domestic fossil fuel resources. Thus, if imports were to be cut off, she loses capability to continue the war and economic activity collapses.

Q What countries does Japan import fossil fuels from?

A Japan depends on the Middle East for more than 90% of its crude oil imports. For LNG and coal, although dependence on the Middle East is low, Japan still relies on imports from Asia and other overseas sources.

Sources of Japanese fossil fuel imports (2022)



Source: "Trade Statistics of Japan", Ministry of Finance (The degree of dependence on sources outside Japan on FY is derived from "Comprehensive Energy Statistics of Japan", published by the Agency for Natural Resources and Energy)

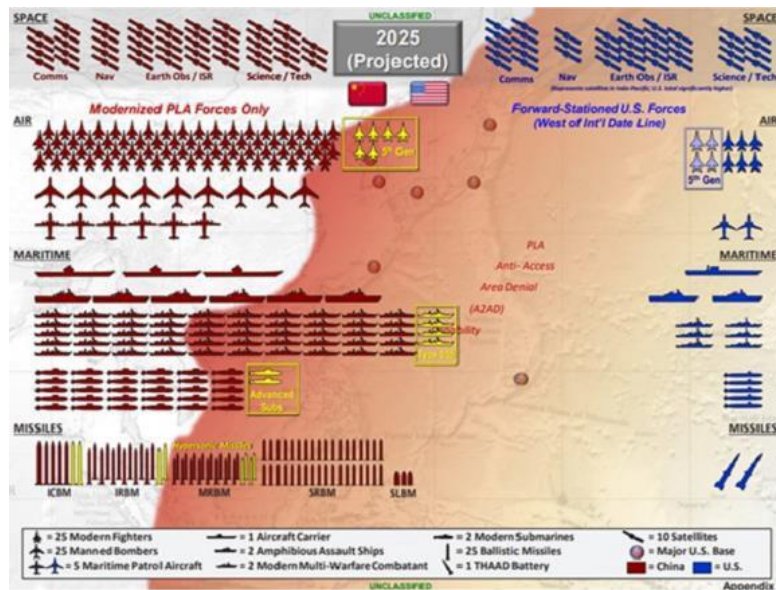
https://www.enecho.meti.go.jp/en/category/brochures/pdf/japan_energy_2023.pdf

Figure 2: Japan's Energy Import Sources. Source: Agency for Natural Resources and Energy.

In the Energy White Paper (Agency for Natural Resources and Energy 2023) approved by the Cabinet in June 2023, the word "Taiwan" appears only in part in the explanation of statistics and in the overview of the energy situation in each country. The term "sea lanes" does not appear even once. It does mention "stable energy supply". These notions are just the same with a series of old white papers that have been issued annually for the past 50 years. It says that Japan should diversify its energy supply, stockpile oil and other resources, and strengthen relations with resource-supplying countries. It also points out the need to strengthen prevention against natural disasters such as typhoons and tsunamis. While these are all important, there is no recognition of the changing geopolitical tensions surrounding Japan.

Below, we would like to examine Japan's sea lanes. If an invasion of Taiwan were to be accompanied by military force, how would the United States react? When the risk of a military conflict between the U.S. and China increases, the U.S. carrier task force is expected to evacuate the Taiwan area and temporarily move back to Guam. This is because the balance of conventional forces in the vicinity of Taiwan is currently dominated by China, which has an overwhelming advantage over the United States, especially in the area of intermediate-range

missiles, with the United States having no missiles against China's 2,000 missiles (Figure 3)



Allison and Glick-Unterman (2021, p. 10).

Figure 3: U.S.-China Balance of Power

Since aircraft carriers are vulnerable to this medium-range missile attack, they would retreat to Guam, and from out of range of Chinese medium-range missiles, U.S. forces would attack Chinese forces near Taiwan. Such a scenario was considered in a simulation (Cancian et al. 2023) by the U.S. Center for Strategic and International Studies (CSIS) and was discussed widely in Japan. The scenario means that neither the U.S. nor China will have complete control of the sea lanes around Japan. In this situation, if transport ships heading for Japan are attacked by missiles, drones, or submarines, the transport of goods by sea to Japan will be disrupted. In the war in Ukraine, Ukrainian drones destroyed an oil refinery in Russia 1,250 kilometers away. In the Red Sea, drone strikes by Houthis have effectively blockaded Western cargo ships.

Even in the event of a political integration of Taiwan, rather than an invasion involving military force, China will increasingly deploy its military presence in the Western Pacific by using ports east of Taiwan as bases. Ports on the Chinese mainland, like those in the East China Sea, would be constrained in terms of submarine activities due to the shallow water in the vicinity, but a port east of Taiwan would solve this problem. After the annexation of Taiwan by China, the arms race in the Western Pacific will intensify, and China's ability to threaten Japan's sea lanes will also increase.

In other words, Japan's sea lanes would be threatened once an emergency occurs in Taiwan, whether by armed invasion or political integration without military force. Under the current situation, the loss of Japan's sea lanes would immediately mean the loss of its ability to continue warfare. Therefore, in order to deter such a Taiwan contingency, Japan must show China in advance that it is well prepared and will not give in if its sea lanes are threatened.

China's Sea Lanes and Capability to Continue the War

Before going any further, I would like to briefly examine China's sea lanes. In the event of

an emergency in Taiwan, the Strait of Malacca is in the U.S. military's sphere of influence, so China could be subjected to a naval blockade, but how much of a blow would that be to China's energy supply? China's dependence on fossil fuels is as high as Japan's, close to 90%.

Of course, this will cause a certain amount of pain for China, but the situation is not as serious as it is for Japan. This is because China has an abundance of domestically produced energy, as well as energy supplies from Russia and Central Asian countries.

First and foremost, coal, which accounts for 60% of primary energy supply, is 95% domestically produced in China. Therefore, even if the sea lanes are disrupted, there is basically no energy shortage. Coal is also the main source of power generation, so there is little concern about extreme power shortages.

Natural gas has recently been increasingly used for power generation and civilian purposes as an environmental measure, and imports have accompanied this trend. However, imports of liquefied natural gas (LNG) via sea routes account for only a quarter of the total natural gas supply; 60% is domestically produced, and the remainder is imported by pipeline from Russia and Central Asia. Therefore, even if LNG from marine transportation were to be disrupted, a serious supply shortage is unlikely.

Regarding oil, China is highly dependent on imports by sea, including large imports from the Middle East at 5.62 million barrels per day. However, of the 16 million barrels per day of oil consumed by China as a whole, one-quarter, or 4 million barrels per day, is domestically produced. It also imports about 2 million barrels per day from Russia, so even if sea lanes are disrupted, a certain level of capability to continue the war will be ensured.

Of course, if this were to be prolonged, the economic damage would be enormous. However, compared to Japan, an island nation surrounded entirely by the sea, China's energy supply in its war-fighting capacity is more robust against the loss of sea lanes in the Strait of Malacca and elsewhere. Thus, if the security of energy maritime transport in the Western Pacific were to collapse, it is Japan who falls down first, not China.

2 Reinforce energy reserves and infrastructure defense

In the following sections of this paper, I propose three measures to strengthen Japan's energy security and energy capabilities to continue the war with a Taiwan contingency in mind. The first means is to increase energy reserves and strengthen the defense of energy infrastructure.

Energy Infrastructure Under Attack

As already mentioned, the wars that have been taking place around the world over the past few years have clearly demonstrated to Japan that energy infrastructure is a target for attack when the time comes. Let us add some more details below. Russia continued its military strikes against Ukraine's energy infrastructure, severely undermining Ukraine's ability to supply electricity; the bombing campaign, which continued throughout the winter heating season of 2022-2023 and resumed in the winter of the second year of the war, targeted

a wide range of energy infrastructure. The World Bank estimates that Ukraine's energy infrastructure suffered US\$12 billion in damage and more than half of its electricity infrastructure was damaged (Reuters [2023a](#))

Russia had already caused widespread destruction in its first attack; in October 2022, Ukraine's energy minister said that approximately 30% of Ukraine's energy infrastructure appeared to have been attacked in a single day. Over the next seven months, Russia targeted energy facilities throughout the country with missiles and drones, damaging most thermal and hydroelectric power plants. As a result, some areas had electricity, heating, and internet access for only a few hours a day, and hospitals, businesses, and homes had to back up with expensive diesel generators (Vatman and Hart [2024](#))

In response, Ukraine has also been conducting repeated drone attacks on Russian energy infrastructure, causing significant damage to oil refining facilities. Intensive attacks by Ukrainian forces on Russian oil-related facilities reportedly reduced Russia's oil refining output by 4% in January 2024 (NHK [2024](#)) Some drones also reportedly flew more than 1,250 kilometers from Ukraine and destroyed oil refining facilities in St. Petersburg (Reuters [2024a](#)) The Ukrainians explain that this was an attack on a military facility in order to stop the production of diesel fuel and other fuels for military vehicles. In fact, the Ukrainian motives are believed to include, in addition to this, depriving Russia of its ability to export oil and gas, her main source of revenue, and to destroy the will to fight the war on the Russian side.

In the Red Sea, located between the Arabian Peninsula and the African continent, the Houthi rebels in Yemen, backed by Iran, have been attacking transport ships of countries cooperating with Israel with missiles and drones, claiming to support the war against Israel in the Palestinian Gaza Strip. As a result, transport ships of Western companies have cancelled their voyages in the Red Sea. In order to pass from the Mediterranean Sea to the Indian Ocean, the route through the Suez Canal in Egypt is no longer available, and they are forced to divert to the Cape of Good Hope in far southernmost Africa. This has caused problems such as higher shipping costs and delays in cargo transport (Japan External Trade Organization [2024](#))

Enhanced Strategic Stockpiling of Fossil and Nuclear Fuels

If Japan were to be subjected to a de facto maritime blockade due to missile or drone threats, it would respond by drawing down its stockpiles of energy, but what is the current status of such a stockpiles?

The public and private sectors have a combined oil strategic stockpile. The total inventory is more than 200 days. Otherwise, there is no strategic stockpile for other fuels and there are only commercial storage by private companies. LPG storage is about for 100 days. Coal storage is only for one month, LNG storage is for only one or two weeks. In addition, there is LNG on board ships in transit, but only for about two weeks.

In stockpiling, consideration must be given to increasing stockpiles and how to do so, as well as to strengthening defenses against attack. In coal, the operation has so far been to minimize inventories from the standpoint of cost reduction. Coal can spontaneously combust if stored for long periods of time, so technical considerations are necessary, but it may be possible to strategically store several months' worth of coal. This has not yet been

systematically investigated and needs to be urgently considered.

Since LNG is a cryogenic liquid, loss due to evaporation is inevitable, even when stored in a container with good insulation. Therefore, it is basically unsuitable for long-term storage. However, if a certain cost is accepted, the stockpile can be increased to some extent. As with coal, no systematic research has even been conducted on this issue.

In contrast to fossil fuels, nuclear power, once loaded with fuel, can normally continue to generate power for one year, or even three years in an emergency. Moreover, if stockpiled in the form of nuclear fuel, it takes up very little space and does not deteriorate over time, so it can continue to generate power for many years. This would be the least expensive of all stockpiles. Nuclear power is the most effective means of countering a sea blockade.

Strengthen defense of energy infrastructure

Japan's current defenses against attacks on its energy infrastructure completely lacks the balance. Only nuclear power plants have been subjected to heightened anti-terrorism measures and have even been shut down for this reason. In reality, however, nuclear power plants still present the highest hurdle to attack. Access to the site is strictly limited. Nuclear power plants are designed so that even if an aircraft crashes into them, it will not cause an accident. Even if attacked by a missile, the nuclear reactor is contained in a containment vessel and further contained in the buildings, so it is unlikely to be destroyed to result in a severe accident. In addition, as a countermeasure against frequent earthquakes, tsunamis, and typhoons, which are unique to Japan, power lines, auxiliary power sources, emergency vehicles, and emergency command centers are multiply deployed, which will also function as a military attack preparedness.

In stark contrast, oil storage tanks, or gas, coal, and oil tankers, thermal power plants, and power substations would be easily destroyed by portable weapons or drones in the current situation. Many are located on the ground and can be easily approached by car or ship. At best, they are surrounded by fences and have no protection against attacks from the air. It is imperative to revise the strategy to strengthen the defense of the entire energy infrastructure by reviewing the anti-attack measures that have focused solely on nuclear power so far.

Improve Capability of Food Supply to Continue the War

Along with energy supply, food supply is important as a capability to continue the war, but this is closely related to energy supply capability. This is because the food supply in the modern era uses enormous amounts of energy. Currently, 10 calories of fossil fuels are used to provide one calorie of food to humans, from crop production to home preservation and cooking.

In terms of greenhouse gas emissions, it is said that one-third of the world's emissions are related to food. This means that about one-third of energy consumption is related to food. The reason why so much energy is needed is that oil is required to run tractors and other agricultural machinery for crop production, and natural gas is used extensively in the production of fertilizers and pesticides. In addition to agriculture and land use, there is food processing, transportation, refrigeration, freezing, and cooking at home. In short, what we eat on a daily basis is a mass of energy.

Japan policy makers has been using the food self-sufficiency rate as the measure of secure food supply, and there is a strong opinion that increasing this rate is important. However, the fact is that this food self-sufficiency rate is based on the assumption of abundant energy availability, so if energy supply becomes scarce, it becomes completely meaningless. What will be done to prevent people from starving to death in the event of an extreme shortage of energy due to the disruption of sea lanes to Japan?

The first thing that would happen with energy scarcity would be that the transportation of food to the big cities would be disrupted and the big cities would starve. Even if people could escape from the big cities and survive this, what would they do if their food reserves were eaten up? What about fertilizers, pesticides, and power for agricultural machinery? There is a wide range of issues to consider.

Japan has only 1 million tons of rice in its food reserves. That is only 8 kilograms per capita. Will this be enough? Although 100 grams of rice has a high calorific value of 356 calories, 562 grams are needed daily to meet the daily intake of 2,000 calories per person. 8 kilograms is only enough for two weeks.

If we were to meet a year's worth of calories from rice alone, we would need to stockpile 200 kilograms of rice per person. If we assume that 10 kilograms of rice costs 2,000 yen per person, 200 kilograms per person would cost 40,000 yen. That would be 40,000 yen per person for 200 kilograms of rice at 2,000 yen per 10 kilograms. However, rice will keep for several years, so if we eat rice until it is old and stale, our annual expenditure would be about one-fourth of this amount, or 10,000 yen per person per year.

It would also be less burdensome than this if the stockpile is sold for feed or for processing after the stockpile is finished. It would also help Japan prepare for other disasters, such as typhoons and earthquakes. Above all, if this would dramatically increase Japan's ability to continue warfare, it would be important to have some stockpile of rice as a means of deterring war. It would indicate to the enemy that "if you attack us, even if we are completely surrounded, we will definitely counterattack by holing ourselves up for at least a year."

Next are fertilizers and agricultural chemicals. Fertilizers have been designated as "specified critical commodities" under the Law for the Promotion of Economic Security and stockpiling has been initiated, but the variety and quantity are still small. Most fundamentally, it is important to consider the scenario of what a food supply system would look like in the event of energy scarcity. Energy-dependent food supplies as in peacetime would be unsustainable in the first place, and valuable energy would be used predominantly for military operations.

First, stockpiles of rice and other commodities are withdrawn. In the meantime, plant crops that require less energy input and have higher yields. This might be sweet potatoes or potatoes. Fertilizer, pesticides, and seeds for some crops may also need to be stockpiled. Freezing, refrigeration, and trucks would not be available. The people would then be scattered across the country, growing and eating their own food in a way that is close to self-sufficient. Minimal fuel would be firewood. The food, materials, and equipment needed for such a scenario must be considered and stockpiled during normal times.

If well prepared in this way, Japan will not starve for a year or more even if she is

completely blockaded at sea. Then international condemnation will rise against the invaders, and help will come from the U.S. and other countries. Otherwise, Japan may be brought to its knees by the onset of starvation within a month. If China calculates that Japan will fall down in a month, it may indeed rage a war, considering that it will be a done deal in a month and she can come back to the international community soon, as it was the case for Russia upon the annexation of Crimea.

It is precisely for the sake of peace that we must be well prepared for war. Russia invaded Ukraine because it expected that it would soon give in. We must not let China think that Japan is weak and will give in as soon as it threatens a few transport cargos. Japan must establish its energy and food security capabilities and display them to China.

3 Long-term contracts for coal, oil and gas trade under the Japan-U.S. agreement

The second way to enhance Japan's energy continuity capability is to diversify fossil fuel import sources and reinforce them. I suggest especially to strengthen relations with the United States.

In the past, the United States exploited the weakness, Japan's sea lanes, in the Pacific War. One of the reasons Japan marched into the Pacific in the first place was to [seize oil resources in Indonesia and Malaysia in the south](#) because of the U.S. oil embargo. [At the outbreak of the war, Japan had only a two-year stockpile of oil.](#) Japan had intended to win a short war against the U.S., but its hopes were dashed when it suffered a crushing defeat at the Battle of Midway, only six months after the surprise attack on Pearl Harbor, Hawaii.

The U.S. attacked Japanese cargo ships indiscriminately, resulting in most of them being sunk. With no imports at all, Japan was short of all goods supplies and extremely short of oil. The Japanese Navy had only fleet-to-fleet battles in mind and did not envision the mission of escorting cargo ships. For this reason, escorting cargo ships was the responsibility of the Army, which had absolutely no ability to defend cargos against U.S. attacks. Japan, which lacked energy supplies, especially oil, was completely defeated by the U.S. forces, which had built up overwhelming firepower backed by an industrial strength ten times greater than Japan's (Horikawa 2021).

Now, in light of Japan's geopolitical situation with the Taiwan contingency looming, Japan should procure coal, oil and gas from the United States under the aegis of a political agreement through long-term contracts.

In the three decades since the end of the Cold War, the globalization of the economy has led to the pursuit of short-term profit-oriented procurement for coal, oil and gas. In other words, contracts have shifted from long-term to short-term contracts. The most inexpensive combination has been sought regardless of nationality of ship owners, crew members, shipping companies, and insurance companies. And as a consequence, 94% of Japan's crude oil procurement is now concentrated in the Middle East.

Now then, what would happen if China were to threaten the waters around Japan with drones and the like in a tense international situation, such as when the Taiwan contingency is in the countdown or Taiwan is already under a maritime blockade? We cannot expect cargo ships, which consists of various nationalities, to sacrifice themselves

in favor of loyalty to Japan. Then oil and gas imports to Japan would be cut off.

As one way to avoid this situation, I would suggest that U.S. coal, oil and gas be imported by U.S.-flagged tankers. Even China must be prepared for a significant escalation of tensions between the U.S. and China if it attacks ships flying the U.S. flag. Since China would like to avoid U.S. intervention as much as possible in the implementation of its operation to unify Taiwan, China would be hesitant to attack ships flying the U.S. flag.

There is a precedent for this. During the Iran-Iraq War, when Kuwaiti-flagged ships came under attack by Iraq, the Kuwaiti government proposed that the Kuwaiti-flagged tankers be converted to U.S. ships. The U.S. accepted the proposal, and the tankers were then registered as U.S.-flagged vessels and escorted by the U.S. Navy. This was called Operation Ernest Will (Kanazawa 2018),.

At that time, there were legal and political oppositions in the U.S. over the military operation to protect the vessels that are suddenly reflagged to be the U.S.'s (Wachenfeld 1988). To avoid such oppositions, and to ensure the U.S. commitment to energy supply in the event of an emergency, it would be important to establish a system in peacetime to transport U.S. produced energy by U.S.-flagged vessels under long-term contracts supported by governmental commitments.

These oil and gas import contracts should be long-term contracts, not short-term contracts. Short-term contracts are more likely to motivate private companies to simply change contracting partners upon a contingency.

And this must be backed up politically by an intergovernmental agreement, not just a contract left to the private sector. There are three reasons for this. First, as mentioned already, it is to make it clear that this is a project of national prestige for both Japan and the U.S., and to raise the bar for attacks from China and other countries. Second, the imports from the U.S. may be somewhat more expensive for Japan than imports from the Middle East in terms of energy prices. As this should be viewed as a premium from a security perspective, it should be borne by the nation, not the private sector. Third, an internationally agreed treaty would protect private-sector trade activities from capricious political changes.

The U.S. is a nation of shaky politics and, above all, often inconsistent on energy issues. In January 2024, the U.S. Biden administration, at the urging of environmental activists, [halted approval of the investments to increase LNG export capacity](#). To avoid being at the mercy of such U.S. politics, it is advisable to conclude long-term rather than short-term contracts commercially, and treaties internationally.

The United States will completely change its energy policy once the Trump administration takes office, with "[energy dominance](#)" replacing Biden's "Green Deal" as the [new motto](#). Energy dominance is about providing abundant, stable, and inexpensive energy, thereby ensuring the security and economic growth of the United States and its allies and friends. This is nothing more than a reenactment in a different form of the U.S. strategy of energy and goods dominance that led to the victory against Japan. Mills (2016) argued U.S. has oil production capability to achieve such energy dominance.

The United States, led by the Trump administration, will seek to establish energy dominance against Russia, China, Iran, and other adversaries. From the U.S. perspective,

one element of achieving this energy dominance will be an agreement on coal, oil and gas exports to its ally, Japan.

4 Revise de-carbonization policies

Having discussed above the revision of Japan's energy strategy with the Taiwan contingency in mind, we conclude with a third suggestion: that Japan should revise its de-carbonization policies that are destroying its own energy security.

Japan has set a goal of reducing CO2 emissions by 46% from the 2013 level by 2030 and to zero CO2 emissions by 2050. And the actual figures as of 2022 show a significant decrease in CO2 emissions compared to 2013, and the government [touts that](#) CO2 emissions [are](#) steadily decreasing due to the effects of its policies, or "[on-track](#)" (see figure).

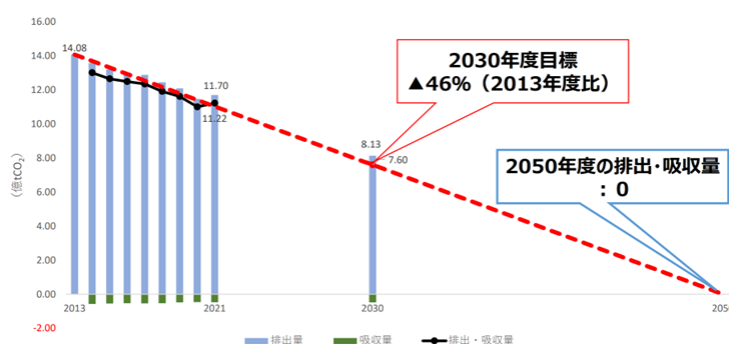


Figure 4: Japan's CO2 Emissions Trends and Targets.

But what is actually the reason for this decrease in CO2 emissions? The Keidanren's data analyzes three factors that have contributed to the change in emissions in the industrial sector. These factors are (1) changes in the volume of economic activity, (2) changes in CO2 emission coefficients (low-carbon energy use), and (3) changes in energy use per volume of economic activity (energy conservation). The factor decomposition shown in Figure 4 indicates that of the reduction in CO2 emissions in the industrial sector from FY 2013 to FY 2022, three-quarters of that contribution was due to the decline in economic activity (1). Of the remaining one-quarter, only 19% was due to the low-carbonization of energy through the expansion of renewable energy and the restart of nuclear power plants (2), and only 6% was due to energy conservation (3). In other words, [three-quarters of the decline in industrial sector emissions is due to industrial hollowing out](#).

In other words, the reason for the steady "on-track" decrease in CO2 in Japan is de-industrialization, not the effects of global warming measures as the government boasts. The Japanese government's plan is for CO2 to decline further and further, but if this really happens, Japan's industries and economy will collapse. This would also mean the loss of national strength to counter the unification of Taiwan by China and the Finlandization of Japan.

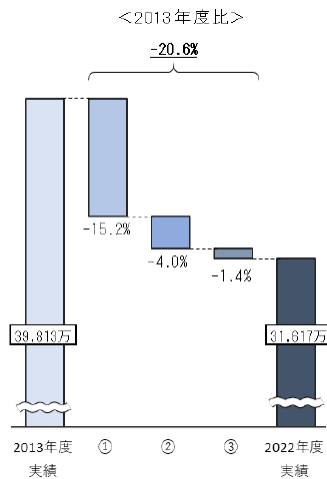


Figure 5: Factor Decomposition of Japan's Industrial Sector CO2 Emissions Reduction

METI, which once staunchly resisted CO2 reductions that would undermine the economy, has changed completely and has become the most powerful agent to promote de-carbonization policy with heavy vested interests. The Green Transformation Act was passed in May 2023, giving METI the authority to "regulate and support" 150 trillion yen in public and private green investment over the next 10 years. This is 15 trillion yen per year, or 3% of Japan's GDP. Japan's defense spending has been increased to 2% of GDP starting in 2024 after political controversy, but the planned green investment is much higher than that.

Of the 150 trillion yen, 20 trillion yen will be obtained by national "green debt" according to the plan. The 20 trillion yen will be redeemed through carbon pricing, i.e., energy surcharges and government sales of emission credits. Thus, the METI bureaucracy has become bloated, and budget, authority, and government positions for green transformation have been newly institutionalized.

The investments in green technology that will be made within this framework will have little return. The reason is that they will be used to promote expensive technologies. In other words, the largest investments will be in renewable energy sources such as solar and wind power. Other investments include the construction of transmission lines and the installation of batteries to accommodate intermittent renewable energy, as well as CO2 capture and storage (CCS) and ammonia power generation, which will cost two, three, or more times as much as existing thermal power generation. There is little prospect that the cost of any of these technologies will come down dramatically. When government regulations and subsidies eventually cease, no one will invest in these green technologies, and all previous efforts will be in vain.

In addition, the Japanese government has regulated the use of fossil fuels in order to decarbonize the country, and government forecasts for fossil fuel use have been kept low. This has resulted in the hollowing out of the industry, as noted above, with companies scaling back domestic production activities and relocating overseas.

Such self-destructive de-carbonization policies have been vigorously promoted in recent years under the left-leaning G7 and the ruling Liberal Democratic Party of Japan (LDP), which is also left-leaning. Unlike in the past, the Japanese bureaucracy has become

completely vulnerable to the political power of the moment. METI has succumbed to political pressure to promote de-carbonization policies and has abandoned its original mandate to achieve economic growth in effect. The Agency for Natural Resources and Energy, which is part of METI, has abandoned its *raison d'etre* of providing a stable energy supply in effect. Both have succeeded to a great extent in bloating their bureaucracies by spearheading a major shift to place the highest priority on de-carbonization. However, this has been to the great detriment of Japan's national economy and security.

However, the world is currently in a state of flux. With wars in Ukraine and the Middle East, and the Taiwan contingency looming, it is crucial to fundamentally rethink the current energy policy that only considers de-carbonization and change it to an energy policy that achieves security and economic growth.

Japan's politics are currently in turmoil due to corruption scandals, but if a conservative administration emerges from the ranks, the country's de-carbonization policies will be reevaluated. If a Trump administration comes to power in the U.S., the U.S. policy will be to promote energy dominance, and Japan may be able to follow suit and steer the country toward energy dominance.

Specifically, energy security for fossil fuels should be strengthened in the ways described in this paper. In addition to this, Japan and the U.S. should cooperate to promote nuclear power and cut back the green investments that entail enormous economic costs. An important step toward such a policy shift would be to withdraw from the Paris Agreement with the United States, effectively ending the pact. The Kyoto Protocol was effectively ended when Japan withdrew from the agreement, and Japan is in a position to do the same again.

Rather, even if the Paris Agreement survives, it will fail in the not-too-distant future. Under the Paris Agreement, developed countries are committing to a 2050 de-carbonization target that is not only unfeasible, but unsustainable because it will hollow out industries and destroy economies. Changing this to a realistic number would be impossible under the Paris Agreement, because the Paris Agreement has been taken over by the doomsday thinking that says the world will end if CO₂ emissions are not reduced to zero by 2050.

On the other hand, the Global South is fed up with the preaching of the developed countries and has no intention of implementing the same self-destructive de-carbonization policies as the developed countries. 2022 saw the Global South scrambling to procure fossil fuels and build thermal power plants in response to the global energy crisis originating in Europe. 2023 saw the G7 call for a 2050 zero emission goal, but the Global South rejected it outright and it was not even on the agenda at COP28 at the end of the year.

The sooner the end of the Paris Agreement becomes clear, the better for the liberal camp; if it is delayed by even a year, the deeper the wounds of economic suicide for the liberal camp. This will be taken advantage of by adversaries such as China, Russia, and Iran.

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