Japan's Energy Security in the Persian Gulf: Caught Between New and Old Challenges

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The goal of this paper is to investigate the evolution of Japan's energy strategy in the Persian Gulf and understand how intra-Asian competition for business opportunities in the region can impact Tokyo's energy security. It analyzes the current state of defense cooperation agreements (DCAs) between leading East Asian and Gulf Cooperation Council countries (GCC). DCAs are considered among the most relevant tools available to states to build up strategic partnerships. Successful DCAs with GCC states are therefore an indicator of political and security commitment. The research analysis concludes that Japan has yet to engage with Gulf countries—let alone catch up with other East Asian powerhouses—on security partnerships. Consequently, Japan is likely to miss the opportunity to foster deeper engagements with key GCC oil and gas suppliers and suffer growing energy insecurity as a result.

Introduction

There is a growing body of research on Japan's interaction with Gulf countries and inter-Asian competition to gain competitive advantage in the GCC. Yoshikazu Kobayashi and Yukiko Miyagi have addressed Japan's balancing posture between energy imports and conflicting U.S. security objectives in the region.[1] Namie Tsujigami and Koji Horinuki have explored the inter-Asian rivalries for business opportunities that can potentially impact Japan's energy security.[2] Kazuto Matsuda and Nikolay Kozhanov have shown that GCC and Japan's economic relations involve broader non-energy business interests and foreign policy imperatives, rather than mere energy supply considerations.[3] Empirical studies based on data collection have also pointed out the dominant role of East Asian states in trade flows with the GCC.[4] Furthermore, according to Li Chen Sim, "Gulf states also contribute to reduce import dependence by increasing indigenous crude oil and petrochemical production in Asia."[5] In essence, the complementarity and interdependence between GCC and East Asian states spans over a wide range of business activities with strategic implications that are likely to intensify competition between Asian energy consumers.

One field of research that needs further clarity is the role of DCAs in inter-Asian competition regarding the establishment, or consolidation, of strategic partnerships with Gulf countries. In this paper, DCAs are intended as bilateral framework treaties that "institutionalize their signatories' day-to-day defense relations, facilitating such wide-ranging activities as defense policy coordination, joint research and development, weapons production and arms trade, joint military exercises, training and exchange programs, peacekeeping, and information exchange."[6] As underlined by Brandon J. Kinne, "States use DCAs to modernize their militaries, respond to shared security threats, and establish security umbrellas with like-minded states."[7] In other words, DCAs form the cornerstone of strategic alliances.

The high degree of bilateral trust and technological know-how involved in these partnerships also makes provision for closer diplomatic and business cooperation. Consequently, the advantage of DCA commitments between East Asian and Gulf states is twofold. On the one hand, it offers additional opportunities for oil dependent East Asian countries to boost their energy imperatives. On the other, considering the growing perception of security instability in world politics, it strengthens the military security capabilities and resolve of GCC countries. In the current international system, security and traditional business are therefore closely interconnected.

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This paper begins with an overview of Japan's historical approach to energy security in the Persian Gulf. It then focuses on DCAs between relevant Gulf and East Asian states, to underline the importance of non-oil factors when considering the bilateral interactions of said countries. This consideration is followed by an examination of South Korea and China as security partners for relevant GCC states.

Finally, it offers reasons to believe that pervasive issues related to the normalization of the defense apparatus runs the risk of missing opportunities to foster Japan's ties with key states in the GCC. Hence, Tokyo's current limited capacity to provide military cooperation is likely to cut back on the country's historical role as the GCC's preferred Asian partner for business activities. Given the importance of defense commitments for state security, amidst current shifts in the balance of power and the willingness of South Korea and China to broaden their security engagements with GCC countries, Japan's traditional cooperation with Gulf states—including energy markets—is unlikely to remain unaffected by its inability to participate in DCAs.

Energy Supplies as Japan's Achilles Heel in International Politics

Crude oil and natural gas play a decisive role in the global economy. Such primary fuel resources form the linchpin of current industrial processes including manufacturing, transportation, or electricity production. Hydrocarbon energies therefore carry strategic importance for industrial powerhouses, such as Japan. Having no significant reserves of its own, Tokyo relies on overseas imports to meet its requirements. In other words, Japan is exposed to global energy disruptions.

Another dimension of the issue is Japan's almost total reliance on crude oil shipments from a specific location: the Persian Gulf. Being part of the Middle East, the Persian Gulf is in one of the world's most politically polarized and conflict-prone region. The 2019 attack on a Japanese shipping company tanker in the Gulf of Oman[8] and 2024 Houthi disruption of sea traffics in the Bab al Mandab Strait[9] have shown that the absolute security of major strategic waterways, the life breath of Japan's economy, cannot be taken for granted. Over-reliance on crude oil suppliers clustered in an unstable location, coupled with a long and vulnerable maritime supply chain, have been a security headache for Japanese strategists for decades.

With the coming of the new millennium, Tokyo's energy security has become even more precarious. Traditional Asian exporters have turned into hungry consumers, emerging economies are pressuring Japan's fuel supplies, and the 2011 Fukushima earthquake disaster nearly phased out Japan's nuclear industry, increasing the country's dependency on imported resources.[10] To make matters worse, Washington's partial military redeployment to East Asia, amidst current U.S. strategic priorities, is likely to have destabilizing effects on other regional theaters in the foreseeable future, including the Middle East. Japan's leadership is therefore having a hard time balancing between increased competition over fossil fuel energies, a post-Fukushima nuclear risk-adverse public opinion, and growing risks of logistical breakdowns to secure affordable energy supplies.

An Energy Security Constrained by Geography: The Opposing Cases of LNG and Oil Imports

Japan has arguably one of the most extended and exposed energy networks in the world. Aside from being a large crude oil buyer, Tokyo has also experienced massive rise in LNG imports after the Fukushima disaster, becoming the world's biggest importer of the fuel in 2019.[11] Japan's LNG and oil supply chains share some similarities but are not the same. First, although accounting for more than 15 percent of LNG imports, the Middle East is less critical for Japan. Tokyo's overseas LNG imports are well diversified, and its main suppliers are "Far East" countries, such as Australia or Malaysia. As a result, the LNG supply chain is shorter and its main supplier, Australia, is both one of Japan's closest political allies as well as the world's biggest producer.[12] LNG carriers from Australia to Japan can avoid travelling through maritime passages that pose critical risks to the complex logistic networks that link East Asian economies to their Middle East suppliers. Japan's LNG supply chain is therefore inherently more resilient than its crude oil counterpart.

Tokyo's energy Achilles heel lies in its structural dependence on the Middle East for crude oil supplies. According to the Organization of Petroleum Exporting Countries (OPEC), the Middle East accounts for nearly 70 percent of proven crude reserves.[13] In other words, geographic concentration is a major feature of crude markets which limits Tokyo's supply chain diversification. Based on data provided by the Ministry of Economy, Trade and Industry (METI), in 2022, Japan imported 94.5 percent of its crude oil from the Middle East, with two countries, Saudi Arabia and the United Arab Emirates (UAE), accounting for nearly 75 percent of global imports alone.[14] Securing partnerships with the main oil producers in the Middle East, namely the Gulf Cooperation Countries (GCC) and Iran, has therefore been considered a top priority in Tokyo's postwar energy security strategy.

However, importing from such sources overseas is difficult for two reasons.

First is geography. Japan's crude oil supply network starts in the Persian Gulf and must pass through three main chokepoints, two of which, namely the Persian Gulf and the Taiwanese Strait, are currently geopolitical flashpoints. The Malacca Strait, although a historical breeding ground for piracy, has not experienced severe upheavals since World War II. The disruption of previous chokepoints is considered sufficient to cause catastrophic losses to any East Asian economies, including Japan.[15] Second is regional political turmoil. Unsettled strategic rivalries between local powerhouses, such as Iran and Saudi Arabia, have always been considered an impending threat to Japan's industrial output. Tokyo has therefore been active in finding diplomatic and peace-oriented solutions to preserve its economic interests in the region.

However, Japan's increasing reliance on Iranian fuels was at odds with American interests. Washington, Tokyo's security guarantor, was strongly opposed to a partnership that could strengthen Iranian interests in a region that was considered paramount for American supremacy at the start of century. Conflicting interests between Tokyo's energy security objectives and Washington strategic goals would lead to one of the most prominent case of U.S.-Japan frictions, the U.S. sanctions on Iranian Azadegan oil field.

Azadegan, one of the world's largest oil discoveries of the past three decades, was considered of outmost importance for Japan. The Iranian oil field was seen as a valid alternative to the Saudi Al Khafji field, which Tokyo had lost after 50 years of exploitation, having declined Saudi terms to construct a new railway. Inpex Corp., Japan's biggest energy explorer, had managed to obtain a 75 percent stake in the Azadegan project.[16] However, revolutionary changes in regional politics would force Japan to comply with Washington's security imperatives and relinquish its deal with Tehran.

Japan's plans for energy diversification were foiled by the U.S.

response to the September 11 attacks in the early 2000's. In the wake of the 2003 Iraq war and the U.S. decision to include Teheran in the so-called 'Axis of Evil', Japan's overture towards Iran had become increasingly untenable. Tokyo was forced to halt its partnership with Teheran in 2010 after Washington imposed sanctions on the Iranian oil industry, including the Azadegan field. The 2015 relaxation of U.S. coercive measures, following the conclusion of the Joint Comprehensive Plan of Action (JCPOA) under the Obama administration, had given Tokyo and Teheran a window of opportunity to resume negotiations over the oil field. Japan's expectations were short lived, as President Trump ended U.S participation in the JCPOA, restoring American sanctions on Iran in 2018.[17] After having already lost its main concession in Saudi Arabia, Japan was forced to withdraw from Iran, undermining its overall energy security in the process. Tokyo's next move was to secure its own share of energy from another Gulf country, the United Arab Emirates. Despite providing technical and human resources as a bargain for oil concessions, Tokyo faces strong competition from other Asian countries, especially China and South Korea.

Beyond 'Petropolitics': Role of DCAs in the Evolving Inter-Asian competition in the Persian Gulf

During the Cold War period, Japan was the major consumer of energy in Asia and faced little competition from other regional powerhouses.[18] The growing industrialization of the region turned historical Japanese suppliers, such as China and Indonesia, into net consumers. For instance, facing insufficient supply for domestic consumption, China, which had been a crude oil net exporter to Japan for decades, suspended its partnership in 2004. The 1990s emergence of other Asian countries with huge energy appetites on the global market created additional challenges for Tokyo.[19] States such as India, South Korea or China have strengthened bilateral and multilateral partnerships with traditional Japanese suppliers in the Middle East. In other words, Japan is now facing increased competition to secure energy sources.

Energy security cannot be analyzed ignoring other factors influencing state politics. As states are involved in a wide range of strategic cooperation, a broad focus is required to comprehensively address Japan's current energy security. Ongoing political trends in global affairs seem to indicate

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that additional tools of national power, such as defense and security commitments, are needed to secure strong partnerships with energy suppliers. The Republic of Korea (South Korea) and the People's Republic of China (China) are interesting case studies to understand the kind of competition Japan is currently dealing with.

Seoul shares similar energy vulnerabilities with Japan and has historically focused on Gulf affairs with two goals in mind, energy security on the one hand, and prolific construction contracts, on the other. Over the last couple of decades, bilateral cooperation has further deepened to include new business opportunities, ranging from defense partnerships to nuclear facilities development. South Korea has leveraged its position as a rising reliable global weapons exporter to bolster local military capabilities, a pressing strategic concern for the two leading GCC members, the UAE and Saudi Arabia, amidst regional tensions.

One of the main strategic priorities of Abu Dhabi and Riyadh is to uphold the status quo in regional politics and deter Iranian threats targeting their most valuable economic assets, oil export facilities.[20] Not only has Iran the largest missile arsenal in the region, including ballistic and cruise missiles, but Tehran also possess a large fleet of long-ranged armed drones (UCAVs), some of which are reported to have an operational range of 2,000 km and a flight time of 24 hours.[21] Likewise, the entirety of UAE and Saudi territories, including oil infrastructures, are well in range of Iranian armed drones and missiles. The accuracy capabilities of Iranian UCAVs and cruise missiles were successfully tested through Tehran's Yemeni Houthi proxies during the 2019 attack on Saudi oil infrastructures,[22] targeting small pumping stations which are more difficult to hit than other larger crude facilities.[23]

Concurrently, the UAE also experienced a sabotage attack on four commercial ships in the port of Fujairah, which lies on the Gulf of Oman. The UAE eastern coastline seaport has strategic value because it represents a safer route in case of energy disruption in the Persian Gulf. Although the identity of the perpetrator was not confirmed, Tehran was allegedly involved in the attack.[24] Previous examples, coupled with the 2020[25] and 2024[26] bombardments of U.S. military bases with ballistic missiles, have shown that Iran has the capability and willingness to target key interests of regional rivals. The Emirati and Saudi leaderships are therefore increasingly interested in bolstering their defense and engage in security partnerships with countries that are willing to provide the necessary equipment, such as South Korea.

Seoul has capitalized on Abu Dhabi's sense of growing exposure to Iranian attacks and local upheavals to become one of the UAE's main security partners. South Korea enjoys some major advantages when it comes to military procurement.[27] Being involved in a frozen conflict with its northern neighbor, the Democratic People's Republic of Korea (North Korea), the South Korean government has always been deeply engaged with its arms companies to maintain hot production lines to resist military aggression. Seoul's capability to swiftly provide ammunitions and produce at scale, coupled with competitive prices and high-quality equipment, has allowed it to become a global player on the international arms stage. The eagerness of South Korea to customize military hardware to client requirements and jointly cooperate to develop indigenous defense industries, including technology transfer, appears to have been a crucial factor in Abu Dhabi's decision to partner with South Korea.

Starting in 2011, with the deployment of the Akh unit–an elite military contingent entrusted with the task of providing training and education for the UAE special forces Seoul has managed to offer solutions that strengthen Abu Dhabi's most pressing security concerns, especially air defense. For instance, in 2022, South Korea concluded its then largest arms export deal with the UAE, acquiring the Cheongung II KM-SAM (Cheongung II) medium-range surface to air missile.[28] The Cheongung II offers detection, tracking and identification capabilities, which are specifically designed to actively monitor and counter aerial threats, such as aircrafts, UCAVs, or ballistic missiles. Moreover, the sense of urgency to build up its air defense is underlined by Abu Dhabi's interest in acquiring the L-SAM long range interceptors, currently under development. Other fields of cooperation include the procurement of Chunmoo multiple rocket launchers, a potential deal to acquire the K-2 Black Panther tank, and a reported interest in joining South Korea's project for a fifth-generation aircraft, the KF-21 Boromae (KF-21).[29]

DCAs have likely helped South Korea to build a competitive advantage in other key industries. For instance, the arrangement that paved the way to the successful security cooperation with Abu Dhabi allegedly contributed to Seoul's victory in a public tender for the construction of a UAE nuclear power plant (NPPs). In 2009, a South Korean consortium led by Korea Electric Power Corporation (KEPCO), the country's largest electricity provider, was awarded a USD 20 billion contract to realize UAE's first nuclear facility, the Al Barakah NPPs.[30] Although South Korea had a consolidated domestic experience in the nuclear field,[31] it is worth mentioning that KEPCO's offer was initially considered an enigma.

According to Steve Thomas, Professor of energy studies at the University of Greenwich, the Korean design had never been "through a proven and strict regulatory process."[32] In addition, having no prior experience in building nuclear facilities abroad, Seoul faced fierce barriers of entry in foreign markets. KEPCO's bid was challenged by a French joint venture and a U.S.-Japanese consortium, both of which were composed of major players with proven expertise in NPPs. In other words, South Korea had to gain a strong competitive advantage to seal the deal. Although many factors can explain Seoul's victory[33]—such as lower costs, high-performances, strong government support, and American Westinghouse's participation in KEPCO's consortium—one decisive element of the nuclear deal could have been the reported existence of a secret military agreement that would compel Seoul to pledge direct military support to Abu Dhabi in case of foreign invasion.[34]

Likewise, the pinnacle of the UAE-South Korea cooperation, the 2023 joint agreement to strengthen the

Special Strategic Partnership (SSP),[35] is deeply connected to security commitments. Defense is considered one of the four key areas of cooperation with the stated goal of raising "the relationship in defense technology to a strategic level". For that purpose, both parties have pledged to contribute middle and long-term investments, and jointly collaborate to develop "a wide range of defense technologies". The current high-level of mutual trust between the said partners is best exemplified by a reported statement of the UAE leader, Mohamed bin Zayed bin Sultan Al Nahyan, who is quoted to have said that the "Republic of Korea keeps its promises under all circumstances."[36] In a similar fashion, South Korea's President, Yoon Suk Yeol, described the strategic cooperation as "limitless". Considering the above-mentioned factors, it is apparent that DCAs played a pivotal role in Abu Dhabi's decision to invest USD 30 billion in South Korea's industrial ecosystem, the country's largest ever investment in a single foreign economy. The deal also bolstered South Korea's energy security, as the Northeast Asian country is reported[37] to have received guarantees over priority purchase privileges in case of energy disturbances.

The successful collaboration with the UAE also laid the foundation of South Korea's security cooperation with Saudi Arabia, the other GCC member-state with growing defense ambitions. Seoul has recently secured a large-scale air defense contract with Riyadh to provide the Kingdom with 10 Cheongung II air defense systems, two years after the Saudi acquisition of the Chunmoo self-propelled multiple rocket launcher.[38] The deal consolidates a positive trend between the two countries, which are reportedly in talks to discuss a possible Saudi participation in the KF-21 project.[39]

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Furthermore, in the shipbuilding industry, Hyundai, South Korea's largest shipbuilder, is likely to win a bid for Saudi Arabia's frigate project, having entered a joint venture with local state-owned Saudi Aramco.[40] The two companies are already part of a strategic arrangement to build the region's largest and most advanced shipyard. Known as International Maritime Industries (IMI), the Saudi facility is described as a leading project to position "the Kingdom as a hub for maritime engineering and construction", including the realization of very large crude carrier (VLCC) and a marine engine facility.[41] The availability of large maritime infrastructure, which allows the said partners to realize part of the project in the GCC country,[42] is a key element in favor of Seoul as it meets Saudi requirements of creating local jobs to carry out parts of the frigates' building process.

In sum, South Korea has managed to improve its political and economic presence in two key GCC countries, both of which are paramount for its energy security, through an all-spectrum cooperation. As stated by Abel Abdel Ghafar, Fellow and Program Director at the Middle East Council on Global Affairs, "relations historically grounded in energy and construction have grown to encompass deeper political and security ties."[43] In other words, the bilateral relationships between Gulf countries and South Korea have evolved from a strictly business partnership to a strategic one. Military procurements and defense cooperation have been at the forefront of South Korea's initiative to achieve such results in the UAE. Saudi Arabia is also increasingly interested in defense contracts and technology transfers from the Northeast Asian country to bolster its national security. Likewise, considering current shifts in Middle East politics, DCAs are poised to play an increasingly crucial role in strengthening Seoul's position as a strategic partner of GCC members down the line.

China is another example of the growing importance of DCAs between East Asian importers and GCC exporters of energy. Capitalizing on U.S. unwillingness to provide Gulf countries with advanced military systems[44]—such as unmanned combat aerial vehicles (UCAVs), joint strike fighter-F35 (F-35) or ballistic missiles technology—China has managed has induced its leading member, Saudi Arabia, to be partnered on a wide range of security topics.

Riyadh has traditionally been one of the U.S. main weapons customers.[45] However, Saudi Arabia's expectation of becoming a major military power with advanced offensive capabilities is at odds with Washington's strategic goals in the region. Washington's fear of possible U.S. sensitive technology ending up in hostile hands[46] had the unintended consequence of bringing Riyadh closer to Beijing on security matters. China has caught the opportunity to become a trusted partner of the Kingdom, allowing military technology transfers tailored on Riyadh's expectations. Two of such technologies stand out for military deterrence and game changing capabilities on the battlefield: UCAVs and ballistic missiles.

One of the most prominent cases of Sino-Saudi alignment in weapons development is related to UCAVs technology. Beijing has agreed to establish a joint venture to manufacture advanced military drones in Saudi Arabia. Chengdu Aircraft Industry Group (CAIG) gave Riyadh permission to produce under license its own platforms. According to the Royal United Services Institute (RUSI), the agreement will allow the GCC member to produce as many as 300 Wing Loon II precision strike drones.[47] For Riyadh, this cooperation appears to have borne fruits in the form of drone airstrikes in Libya and Yemen. In addition, the Kingdom has also partnered with China to launch its domestic ballistic missile industry.

China's involvement in Saudi Arabia's ballistic missile program is not new. Starting in 1985, when Riyadh bought its first ballistic missiles from China, the medium range Dong Feng (DF) III, the joint effort has grown more diverse and ambitious. Saudi-China relations kept on moving forward, reaching unprecedented levels in the last couples of decades. Saudi Arabia did not only buy more advanced versions of the DF,[48] but also managed to secure China's approval to transfer military technologies to establish the Kingdom's own manufacturing facilities.[49] Given that missile technology is deeply integrated into space systems, it is worth mentioning that Riyadh and Beijing have also partnered to produce satellites and other space technologies.[50] China has

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launched two Saudi satellites[51] and Saudi Arabia is engaged in the Chang'e 4 mission of the Chinese Lunar Exploration Program (CLEP), providing an optical camera.[52]

Yet, DCAs and other bilateral state-of-the-art projects face some hurdles. For instance, a deeper engagement with China might trigger the U.S.' Countering America's Adversaries Through Sanctions Act (CAATSA). In addition, Washington not only remains the ultimate guarantor of Saudi security[53] but has also the option of amending the U.S. Conventional Arms Transfer Policy (CTAP) to accommodate Saudi security demands. Washington's preoccupation over Chinese influence in the Gulf likely led to the 2022 decision to re-supply Saudi Arabia with Patriot antimissile interceptors.[54] Unlike the U.S.,[55] China's ability to project power outside East Asia or pledge direct military support to Riyadh in case of foreign aggression cannot be taken for granted.

However, U.S. refusal to transfer state-of-the-art technologies to strengthen Saudi Arabia's military industrialization and economic development has likely led Riyadh to prioritize cooperation with Beijing to develop defense capabilities that are coherent with its grand strategy objectives. Since "the structure of the international system forces states who seek only to be secure to nonetheless act aggressively towards others,"[56] considerations over security imperatives are always at play. To quote international relations scholar John. J. Mearsheimer, "A rival state that dominates its own region will be an especially powerful foe that is free to cause trouble in your backyard."[57] Likewise, states often give priority to security over other matters, and Saudi Arabia is no exception when it comes to regional power rivalries.

From a Saudi perspective, having domestic ballistic missile and drone technologies can deter regional rivals with similar programs, such as Iran. In addition, Beijing's position as Riyadh's biggest crude customer is likely to convince Saudi Arabia that closer ties with China is worth the risk of deteriorating political relations with Washington. The strategic connection between energy and military security in Sino-Saudi relations has been highlighted by President Xi Jinping during the 2022 Gulf Cooperation Summit in Saudi Arabia.[58] Japan, which according to the Observatory of the Economic Complexity accounts for half the size of China's import[59]—closely followed by another East Asian candidate for local security contracts, South Korea—must therefore consider what impact such security cooperation might have on its energy security in case of international disturbances.

As previous examples have shown, Japan's Asian competitors are strengthening their presence through partnerships tailored on local strategic needs. In other words, they adapt their regional approach to contemporary politics, where U.S. protection of the "global commons" is not taken for granted in many areas of the world, including the Persian Gulf.[60] Responding to local strategic requirements is therefore a powerful tool that can influence the choice of energy partners for exporters, such as GCC countries. For instance, during turbulent shifts in international politics, where security commitment becomes paramount for state survival, a crude exporting country is likely to "give the right of way" to partners that will enhance their defense capabilities.

By contrast, Japan cannot leverage military procurement as a solid diplomatic tool because of existing constraints on international arms transfers. Although the 2022 National Security Strategy (NSS) considers the promotion of defense and technology transfer a key stabilizing factor for Japanese interests overseas[61] and the revision on arms export regulations continues to gain support among decision-makers,[62] the normalization of Japan's military as a tool of political power is far from complete.

Starting with the 2014 introduction of the Three Principles on Transfer of Defense Equipment and Technology (the Three Principles) under the Abe administration, the Japanese government ended its decades-old restrictions on overseas sales of military equipment.[63] Under the Three Principles, Japan clarifies the three conditions for Japanese arms export, including the prohibition on equipment and technology transfers when "destined for a country party to a conflict". To improve Japan's resilience against a vast array of regional threats, the Kishida administration revised the implementations guidelines of said principles in 2023. The 2023 landmark decision not only allows the export of finished products, including lethal ones, "to any nations that has a licensing agreement with Tokyo to manufacture domestically,[64] but also offers the opportunity to create a more efficient and sustainable defense industry.

Likewise, the development of Tokyo's current flagship military project, the Global Combat Air Program (GCAP)[65]—a multinational endeavor with the United Kingdom and Italy to jointly develop a sixth-generation fighter aircraft—is expected to be a milestone experiment to assess Japan's current stance on the Three Principles. Not only will the GCAP cast a light on Tokyo's capacity to partner with allied nations other than the United States on defense programs, but also measure the nation's aptitude to act as "normal State" on the global security stage.

Although the revised guidelines of the Three Principles open a new path to international partnerships, only 15 countries currently meet the GCAP eligibility criteria. The signing of the 2024 Japan-UAE defense agreement makes the UAE one of the eligible countries for export.[66] However, the reported "strict conditions" imposed by Japan's government on exports of the next-generation fighter jet,[67] coupled with Abu Dhabi's involvement in the Yemen War calls into question whether the GCC member meets the legal requirements. It is worth mentioning that third countries with no licensing agreements or involved in military conflicts, such as Saudi Arabia and the UAE, still fall under the restrictions of the Three Principles.[68] The same holds true for the Official Security Assistance (OSA)—a new framework aimed at providing defense equipment and bolstering deterrence efforts of like-minded countries—which remains bounded to "fields not directly relating to any international conflict."[69]

Furthermore, Japan has also been reported to have opposed

Saudi's participation in the GCAP out of domestic and security concerns. While it is true that pressing concerns over the overall security of Japan are eroding the strong antimilitarist mindset of the Japanese society,[70] large swaths of the citizenry,[71] including LDP's coalition partner Komeito and opposition parties, remain committed to pacifist ideals and opposed to the free use of military assets as a tool of political power on the international stage.

Komeito's role in the policy process of arms relaxation is worth mentioning because it has been a crucial LDP partner to form stable governing coalitions since 1999. Likewise, any major disagreement with Komeito runs the risk of weakening the LDP's grip over Japanese politics. Although the Kishida administration managed to convince the Shinjuku based political party to back the government's decision to loosen restrictions on defense exports, Komeito was able to impose stringent conditions, limiting the export of jointly developed military hardware to the GCAP program on a case-by-case basis.[72]

Furthermore, a majority of Komeito supporters still oppose the relaxation of the rules on arms export, with nearly 60 percent of party affiliates disapproving the plan,[73] constraining the party's lawmaker room for maneuver on sensitive topics, such as the future direction of the country's defense ecosystem. The steady opposition of Komeito's voters to international military endeavors, amidst Tokyo's precarious security position in the international system, sheds light on the difficulties that can hinder the government's options when it comes to normalizing military policies and exporting lethal weapons to third countries.

Given that Saudi forces are currently fighting a war in Yemen, partnering with Saudi Arabia in the development of advanced weapon systems not only would violate the 2014 Three Principles, but also potentially nourish domestic hostile narratives over more pressing aspects of Japan's current remilitarization. Relatedly, broader security considerations, such as the potential transfer of sensitive technologies to China are a big concern for Tokyo. According to Brandon J. Kinne, "DCAs involve sensitive national security issues, including access to classified information, coordination of defense policies, and proliferation of sophisticated weapons technologies, they inherently involve issues of trust."[74] Trust is likely one of the most relevant considerations in Japan's decision to oppose Riyadh's admittance into the GCAP project.

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The economic, political, and security convergences between Riyadh and Beijing are a pressing concern for the East Asian archipelago. Japan openly identifies China as a destabilizing force in regional politics.[75] Numerous contentious issues have strained the relationships between the two countries in the last decade. Beijing's revisionist approach over the Senkaku and Taiwan questions are the more visible and immediate threats to Japan's territorial integrity and regional security. Likewise, China's rise to the status of military and technological superpower is perceived as an existential threat in Tokyo. The lack of trust over Saudi's management of such critical assets coupled with key technologies potentially falling into the hands of China, has likely constrained Japan's options. Partnering with a country so deeply connected with China on multiple levels is therefore considered not worth the risk of compromising sensitive information on national security.

In sum, it is fair to say that increased cooperation with GCC states over security matters, such as the entry into force of the Japan-UAE defense agreement, remains insufficient to turn Japan into a preferred partner over other East Asian states. China or South Korea have no restrictions over the use of military assets to further foreign policy objectives. Japan on the other hand is still reliant on political cohesion in the LDP and public commitment to remove restrictions on the use of military power to further its own strategic imperatives, let alone partner with non-traditional and far away countries on security matters.

Furthermore, policies are not a straightforward nor perfectly rational process, even when considering a successful balancing strategy against external threats.[76] Impending issues can occur for several reasons, such as the high number of stakeholders influencing the outcome of policy cycles. Simply put, with many pitfalls along the way, it is fair to say that Japanese policymakers do not currently wield enough power to leverage DCAs as a solid tool of political and economic influence in GCC countries. Considering that leading Gulf countries rely on advanced defense technologies and military commitment for political survival, security partners might also be given preference in other economic activities, including energy contracts. As discussed earlier, this statement is supported by South Korea's military secret deal to realize the UAE's first nuclear power plant. Likewise, without stronger commitments to military cooperation, Japan runs the risk of progressively losing its status of leading partner in Gulf economies, undermining its energy security in the process. This is especially concerning given the daunting consequences that ongoing political fragmentation of the post-Cold War international system and growing exposure of sealines to disruption could have on Japan's economic security and social cohesion.

This is not to say, however, that Japan has no viable alternatives to pursue its energy and broader economic interests in the Persian Gulf. Tokyo remains deeply committed to uphold its position as a privileged business partner for GCC member-states. For instance, the number of high-end visits has increased since Shinzo Abe's second term, and the NSS unequivocally identifies the region as one of the most important for Japanese strategic interests. Sitting Prime Minister Fumio Kishida has made it clear that Japan wants a leading role in the decarbonization of Gulf economies.[77] The transition of local economies towards clean energy is relevant because years of technological and organizational excellence can give Japan a competitive advantage in key carbon free projects in Gulf countries. Strategic partnerships concluded between Tokyo and the two most relevant countries of the organization clearly underline the deep trust regional elites have in Japanese capabilities.[78]

In addition, Japan's cautious foreign policy in the MENA region has allowed Tokyo to enjoy good relations with all main actors. Since Shinzo Abe's second term, Japan has been increasingly committed to regional stability. Shinzo Abe not only became the first acting prime minister to visit Iran in 2019 but also refrained from taking part in the U.S. led maritime security force, dispatching its own anti-piracy fleet to the Gulf of Oman.[79] The Self Defense Forces (SDF) remained away from the Hormuz Strait[80] to signal Japan's impartiality in deploying military forces in the Middle East and stood out as a mediator between Iran and other regional stakeholders. For Gulf countries, Tokyo is therefore a stabilizing force in regional politics. In other words, Japan's ability to leverage strong economic and political influence in the GCC states will continue, albeit at a more precarious and diminishing pace.

Conclusion

Japan has traditionally managed to consolidate its footprint in the Persian Gulf against many odds. Its exposure to maritime flashpoints and turbulent shifts in Middle Eastern politics, coupled with American displeasure over Tokyo's energy partnership with Iran have always been of concern to Japanese strategists. Aside from previous challenges, the emergence of new industrial and economic powerhouses in Asia has changed the landscape of the oil market since the early 2000s. Countries such as China and India[81] are now amongst the largest net buyers of crude, increasing competition on the hydrocarbon market for traditional buyers such as Japan.

Furthermore, a narrow focus on crude supplies has become insufficient to grasp ongoing economic and political relations between GCC states on the one hand and East Asian countries on the other. Additional drivers are taking center stage in bilateral and multilateral agendas involving suppliers and buyers. Current cooperation now encompasses a wide range of advanced industrial sectors where Japan's traditional appeal as the only East Asian country with cutting-edge options for technological partnership is over. For instance, China, South Korea, or Taiwan have all developed outstanding capabilities in state-of-the-art technologies that might be "traded for oil". In other words, GCC countries can now choose among several partners, whereas decades ago Japan was virtually the only Asian option for advanced projects.

The nature of the market, coupled with the actors currently competing over Gulf crude, which although plentiful remains a finite resource,[82] can potentially intensify Japan's exposure to energy shocks and for two main reasons. First, it is evident that Japan's energy security continues to be hampered by U.S. strategic objectives in the Middle East. Iranian fuel is currently out of reach because of Washington and Tehran's conflicting interests in regional politics. In other words, Japan's option to engage with Iran on energy cooperation remains constrained because of the former's reliance on U.S. security to achieve its grand strategy objectives.

Second, in the absence of better alternatives, Riyadh will continue to be Japan's most viable option for secured energy supplies in the foreseeable future. However, considering the current diplomatic and economic alignment between Saudi Arabia and China, overreliance on Saudi fuel carries the seeds of potential energy insecurity for Japan. China not only imports more oil from Saudi Arabia than any other country but is also Riyadh's main trading partner. More importantly, however, recent diplomatic deals saw a significant strengthening of ties between the two states. The Chinese mediated normalization agreement between Riyadh and Tehran, coupled with Saudi Arabia joining the BRICS organization, underline the strategic nature of the partnership for both parties. China can therefore be expected to leverage strong political influence on the Gulf state's foreign policy down the line.

Lastly, there is an additional flaw in Japan's energy security that has not been fully addressed: The growing centrality of DCAs when analyzing the interactions of East Asian states with GCC members. Amidst worrying signs of security deterioration in international affairs, countries are increasingly investing in their own security. Likewise, the willingness of states to engage in security cooperation is likely to become the cornerstone of international relations in the foreseeable future, calling into question Japan's ability to remain a preferred energy partner of GCC states without committing to bilateral DCAs. The Gulf states sit in a region that has long been consider an epicenter of social and political instability. U.S. prioritization of the Asia-Pacific theater, coupled with the hastening transition to a multipolar world order,[83] means that DCAs are especially relevant in the oil rich Persian Gulf. The case studies of China and South Korea presented here underscore the importance of using DCAs to boost business interactions. In other words, Beijing and Seoul have fully understood that energy and security commitments are increasingly connected.

Still, one could argue that current changes in Japanese foreign policies and defense posture are paving the way for future normalization. However, despite significant relaxations on arms export restrictions under the Abe and Kishida administrations, there is still a lack of indisputable evidence of far-reaching and long-term policy changes that would enable Japan to freely engage in DCAs with countries other than the U.S. and the latter's closest allies.

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