Delhi Policy Group

Advancing India's Rise as a Leading Power

POLICY BRIEF

The Emerging Political Project of Japan's New Conservative Era

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Cover Images:

1. *Prime Minister Sanae Takaichi delivered an address on general policy at the 222nd session of the Diet on October 5, 2026. Source: House of Representatives, Japan*

2. *PM Takaichi with the reshuffled cabinet on September 17, 2026. Source: PM's Office of Japan*

3.*Sanae Takaichi (R), and Japan Innovation Party leader Hirofumi Yoshimura show a signed coalition agreement to the press in Tokyo on October 20, 2025. Source: Kyodo News*

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Introduction: From a New Cabinet to a New Political Direction

Political change in Japan rarely comes as a clean break with the past. More often, it emerges through a gradual reordering of priorities and political relationships. Sanae Takaichi's first year as prime minister suggests such a shift: an effort to align economic growth, technological competitiveness and national security within a broader political direction.

Takaichi has made notable progress in establishing this direction. She has reshaped the ruling coalition and placed strategic investment and economic security at the centre of policymaking. Her October 2026 policy speech identified 17 strategic fields and 62 priority products and technologies for investment, with the focus on domestic investment and resilience.[1] The September Cabinet reshuffle, which brought the Japan Innovation Party (日本維新の会 *Nippon Ishin no Kai*; JIP) into the Cabinet for the first time, with its Secretary-General Hiroshi Nakatsuka appointed Minister in charge of Regulatory Reform, marked a further step from parliamentary cooperation to shared governance.[2]

In her October policy speech, Takaichi stated that the government must "leverage the power of the economy to safeguard the daily lives of the Japanese people and carve out a hopeful future."[1] The test will be whether this ambition produces tangible benefits for households and businesses while remaining economically credible and diplomatically pragmatic.

Coalition Politics: From Parliamentary Cooperation to Shared Governance

The departure of Komeito (公明党, Kōmeitō) from its long-standing coalition with the Liberal Democratic Party (自由民主党 *Jiyū Minshutō*; LDP) marked a significant break in Japan's post-1999 political arrangements.[3] The JIP subsequently became Takaichi's coalition partner, helping secure her premiership, but supporting the government

[1] Policy Speech by Prime Minister TAKAICHI Sanae to the 222nd Session of the Diet

[2] Press Conference by Prime Minister TAKAICHI Sanae | Speeches [高市内閣総理大臣記者会見｜総理の演説・記者会見など｜首相官邸]

[3] Komeito leaves ruling coalition, vows new start as centrist reform party | News

from outside the Cabinet. Its entry into government in September 2026, therefore, represents a substantive shift.[2]

This new coalition government (連立政権 *renritsu seiken*) brings together parties with different priorities. JIP's agenda of administrative reform, deregulation and decentralisation can complement Takaichi's emphasis on a stronger and more efficient state. Yet JIP may also compete with LDP candidates electorally, creating an inherent tension between cooperation in government and political rivalry. Not all within the LDP are enthusiastic about a long-term partnership.[4]

This arrangement can nevertheless bring constructive pressure. A reform-oriented partner can encourage scrutiny and accountability within a party that has dominated Japanese politics for much of the post-war period. Takaichi has so far managed the transition from parliamentary cooperation to Cabinet participation well. The longer-term test is whether the partners can sustain policy coordination while accommodating their differences.

While a future return to Komeito cannot be entirely ruled out should unforeseen political circumstances alter the equation, this is now a very remote possibility. For the foreseeable future, the more pertinent question is how the LDP-JIP partnership can evolve into a sustainable model of shared governance.

Growth, Investment and the Test of Economic Credibility

Takaichi's economic approach is captured in the phrase "responsible and proactive public finances" (責任ある積極財政 *sekinin aru sekkyokuteki zaisei*). It uses predictable, multi-year public spending to encourage private-sector spending, strengthen productive capacity and support wage growth. The government's strategic priorities span AI, semiconductors, quantum technology, advanced materials, biotechnology, energy, defence-related industries and disaster resilience, with an emphasis on sustained investment rather than short-term stimulus.[1]

The ambition is to connect research, manufacturing and technological deployment, strengthen industrial competitiveness and reduce dependence on vulnerable overseas suppliers. But public spending alone cannot guarantee stronger growth. Investment must raise productivity, translate into higher wages and strengthen household purchasing power, while remaining fiscally credible.

Ultimately, the test is its impact on everyday lives of citizens (国民生活 *kokumin seikatsu*). If strategic investment translates into better employment, higher incomes

[4] One year on, LDP-JIP partnership still has some holes to fill - The Japan Times

and stronger regional economies, it could provide a durable foundation for public support.

Economic Security (経済安全保障 *keizai anzen hoshō*) and Energy Resilience

Economic security has gained prominence in Japan because of vulnerabilities in critical supply chains and dependence on external sources for essential resources and technologies. The Economic Security Promotion Act of 2022 provides a framework for securing critical supplies, protecting essential infrastructure, supporting the development of critical technologies, and safeguarding sensitive inventions through a system for the non-disclosure of selected patent applications where public disclosure could threaten national security.[5] The Takaichi government seeks to build on this foundation by linking technological capability with growth and national security.

Energy resilience is central to this agenda. Japan must balance affordability, decarbonisation and reliable supply through a mix of nuclear power, renewables and energy efficiency, guided by the Seventh Strategic Energy Plan approved in February 2025.[6]

The April 2026 launch of POWERR Asia (Partnership on Wide Energy and Resources Resilience Asia) is intended to extend this approach regionally through emergency financial cooperation, strategic stockpiling, emergency supply arrangements and industrial cooperation.[7] It recognises that Japan's resilience also depends on stronger regional supply-chain resilience (供給網強靭化 *kyōkyūmō kyōjinka*). The challenge is to make these arrangements deliver reliable and affordable energy while containing fiscal and environmental costs.

Diplomacy: Assertiveness with Strategic Restraint

Takaichi's foreign policy seeks to combine a stronger security posture with Japan's economic interdependence. The US alliance remains the foundation of Japan's security, while its management increasingly involves trade, industrial policy, technology and defence cooperation.[8]

South Korea is an important partner, although relations remain vulnerable to periodic strains over historical issues. Takaichi has sought to sustain constructive ties,

[5] Economic Security Promotion Act: https://www.cao.go.jp/keizai_anzen_hosho/suishinhou/suishinhou.html
[6] Cabinet Decision on the Seventh Strategic Energy Plan
[7] Financial Cooperation with Partner-Country Companies under the Partnership on Wide Energy and Resources Resilience Asia/METI Ministry of Economy, Trade and Industry [POWERR Asia]
[8] Japan-United States of America Relations (Basic Data)

including through her January 2026 meeting with President Lee Jae Myung in Nara and continued shuttle diplomacy.[9]

Relations with China require a more delicate balance. Security concerns and strategic competition coexist with substantial economic ties and the need for sustained dialogue. Takaichi's actions over Yasukuni Shrine illustrate the tension between a firm conservative stance and diplomatic restraint. On August 15, 2026, she refrained from visiting the shrine but sent a ritual offering in her capacity as LDP president, while Defence Minister Shinjiro Koizumi visited it.[10]

Her approach signals a firm conservative position, but the challenge is to avoid diplomatic isolation and preserve engagement with neighbouring countries. Managing this balance will be an important test of her leadership.

India-Japan Relations: From Shared Vision to Practical Cooperation

India is a key partner for Japan in building a resilient and diversified Indo-Pacific. Under Takaichi, the relationship has the potential to advance cooperation across three areas: economic security, defence cooperation and people-to-people ties.

The India-Japan Joint Vision for the Next Decade, adopted in August 2025, identifies the Next Generation Economic Security Partnership and Next Generation Mobility Partnership (NGMP) as complementary strands of cooperation.[11] The NGMP provides a framework for collaboration in infrastructure, logistics and mobility, including high-speed rail, rolling stock, signalling and related manufacturing. The July 2026 summit advanced this agenda through a Memorandum of Cooperation to operationalise the NGMP, broadening the scope for public- and private-sector collaboration.[12]

The Mumbai-Ahmedabad High-Speed Rail (MAHSR) project illustrates both the potential and the complexities of this cooperation. Despite delays, it has helped develop Indian capabilities in construction and related manufacturing. The indigenisation of heavy construction machinery, the domestic production of track components and the training of approximately 1,000 Indian engineers and skilled workers in Japanese methods represent tangible outcomes.[13] Its longer-term value will depend on combining Indian capacity-building with Japanese expertise and adapting technology to local requirements.

[9] Japan-ROK Summit Meeting | Ministry of Foreign Affairs of Japan
[10] Japan PM sends offering to Yasukuni Shrine, but refrains from visit | Yonhap News Agency
[11] India – Japan Joint Vision for the Next Decade: Eight Directions to Steer the Special Strategic and Global Partnership
[12] List of Outcomes: Prime Minister of Japan's visit to India for the 16th India-Japan Annual Summit
[13] Mumbai-Ahmedabad Bullet Train Project Experience Lays a Strong Foundation for India's Future High-Speed Rail Network

Defence cooperation has advanced most visibly in maritime security, joint exercises, logistics, maintenance and repair. Cooperation in defence equipment and technology is gaining momentum, but remains at an early stage. The UNICORN integrated communications antenna system is a notable development. Identified by Japan as the first defence equipment transfer project between the two countries, it is intended to mark a new phase in bilateral defence-technology cooperation.[14] A promising parallel avenue lies in Japan's civilian industrial base, particularly in electronics, advanced materials, precision machinery and critical components. Partnerships in these areas could establish supplier relationships, strengthen industrial supply chains and create a foundation for more ambitious defence-industrial cooperation over time.

People-to-people ties should likewise move beyond general exchanges towards practical human-capital development. The bilateral Action Plan for Human Resource Exchange sets an aspirational target of exchanging more than 500,000 personnel in both directions over five years, including 50,000 skilled Indian personnel and prospective talents moving to Japan.[15] Japanese companies operating in India could complement this initiative through human-resource development (人材育成 *jinzai ikusei*), including internships, workplace training, recruitment and, where appropriate, assignments at Japanese headquarters. Such initiatives would build skills while strengthening long-term professional links between the two sides.

Ultimately, this partnership will be judged by the degree of strategic convergence it achieves and its ability to translate that convergence into stronger industrial capabilities and tangible opportunities for businesses, workers and communities in both countries.

Leadership, Public Support and the Limits of Personal Authority

Takaichi's appeal rests partly on the clarity of her convictions and her image as a decisive leader. Her handling of the coalition transition and Cabinet reshuffle has demonstrated political skill in navigating both intra-party and inter-party politics, although sustaining that balance will remain a continuing challenge.

Questions have nevertheless arisen about the durability of her public support. A mid-October Jiji Press poll put Cabinet approval at 42.4%, its lowest level since she took office.[16] Other major surveys conducted around the same time recorded higher figures, ranging from 47.1% to 62.6%, while JNN's latest poll, conducted on October

[14] Japan-India Joint Press Statement | Japan Ministry of Defense
[15] Action Plan for India – Japan Human Resource Exchange and Cooperation
[16] Takaichi Cabinet's approval rate drops to new low of 42.4%, Jiji poll shows - The Japan Times

31 and November 1, put approval at 64.9%.[17-18] Taken together, the surveys suggest that support remains substantial, broadly around 50% or higher, but varies considerably between polling organisations. Sustaining public confidence will depend on economic delivery, political judgement and the government's ability to respond effectively to emerging challenges.

Three tendencies shape Takaichi's emerging political project: a conservative emphasis on sovereignty and national security; a pragmatic approach to coalition management and economic delivery; and a modernising drive centred on technology and institutional reform. Their coexistence gives the project breadth, although the tensions between them will require continued management. It is this combination, rather than any single policy initiative, that may give Takaichi's political project its distinctive character.

The comparison with Shinzo Abe is inevitable. Takaichi has begun to establish her own political direction and has demonstrated the potential to build a significant political legacy. But Abe's stature rested on a much longer record in office, political consolidation and a distinctive policy agenda.[19] Whether Takaichi can achieve a legacy of comparable significance will depend on sustained performance, public trust and her ability to translate policy priorities into lasting institutional change.[20]

Conclusion: The Politics of Incremental Transformation

Takaichi's first year in office points to an effort to integrate economic growth, national resilience, technological advancement and a more assertive foreign policy into a coherent governing project. She has made meaningful progress in establishing this direction, navigating the realignment of the ruling coalition and managing important domestic and international relationships. Her approach represents an ambitious response to Japan's demographic pressures, strategic vulnerabilities and changing regional environment.

Yet ambition alone does not amount to transformation. The project's durability will depend on its ability to deliver broad-based prosperity, maintain fiscal sustainability, maintain effective coalition governance, preserve diplomatic room for manoeuvre and translate strategic partnerships into practical outcomes. Household welfare and public confidence will be equally important measures of its success.

Japan's political evolution may be incremental rather than dramatic. But if Takaichi succeeds in turning strategic priorities into improvements in everyday life while

[17] Public support remains largely intact
https://www.japantimes.co.jp/news/2026/10/20/japan/politics/cabinet-support-rates-yana-resign
[18] Public support【速報】高市内閣の支持率64.9% 前回から1.9ポイント上昇 JNN世論調査｜TBS NEWS DIG
[19] The Japan Times Japan's Longest-Serving Prime Ministers | Nippon.com
[20] Why Takaichi can't be the next Shinzo Abe - The Japan Times

strengthening Japan's capacity to act with international partners, her premiership could mark more than a change of leadership. It could signal the consolidation of a distinct conservative approach to governing and the beginning of a political legacy of her own. Its lasting significance, however, will ultimately be judged not by the ambition of its vision, but by the results it delivers.

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