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Friendly Proliferation and the Future of the Japan-US Alliance

The United States appears to be on the verge of a new grand strategy debate, one that could have profound implications for the spread of nuclear weapons and the sources of international conflict. Washington's extensive network of alliances and security partnerships—along with the extended deterrence commitments that underpin that network—has been the defining attribute of US grand strategy for many decades. Although these commitments can impose burdens on the United States and are often criticized by those who believe they are expensive, dangerous, and unnecessary, they offer a host of benefits, from political influence to military support. In some instances, one of those benefits has been serving as a barrier to nuclear proliferation. Despite the threats they might face, allies and partners under Washington's security umbrella have little incentive to develop nuclear weapons of their own. As the 2018 *Nuclear Posture Review* explained, "In many cases, effectively assuring allies and partners depends on their confidence in the credibility of U.S. extended nuclear deterrence, which enable most to eschew possession of nuclear weapons, thereby contributing to U.S. non-proliferation goals."[1]

Support for this legacy grand strategy is under strain from at least two sides, however. First, many prominent restrainers argue that the United States should rethink its security commitments, reduce its overseas military presence, and play a more circumscribed role in global politics. Second, a new generation

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of prioritizers have also concluded that Washington cannot afford to remain the chief security provider for much of the world, and therefore must pull back from some regions to concentrate on others. Members of these camps disagree on many details, but they could soon converge on one major proposition: nuclear proliferation to friendly states is an acceptable outcome if it allows those states to better deter attacks on their territory, and therefore enables Washington to reduce the costs of extended deterrence and defense.

There is a difference between "unmanaged" and "managed" proliferation

Although the principles of restraint and the logic of prioritization both suggest that a more proliferated world could actually benefit the United States, the case for selective nuclear proliferation remains extremely weak. Notably, those willing to seriously entertain such a dramatic change in US strategy and policy generally fail to consider the difference between "unmanaged proliferation" and "managed proliferation," and how these alternative pathways could make the spread of nuclear weapons more dangerous for any proliferant—and more demanding for the United States—than they suggest.[2]

This looming debate over friendly nuclear proliferation matters a great deal in East Asia, where security challenges for the United States and its allies are growing substantially. The specter of allied proliferation in the region is hardly new and has typically centered on South Korea. But Japan's status as a non-nuclear weapons state should not be taken for granted, either, despite its long-standing aversion to building, maintaining, or hosting atomic weaponry. Any turbulence in US grand strategy would be felt keenly in Tokyo, which is arguably Washington's closest ally in the region and undoubtedly the most important member of any local coalition focused on countering the rise of China. With a fraught security environment in which Japan is surrounded by three nuclear-armed revisionist powers that are each enhancing their arsenals, a new prime minister that appears less bound to foreign policy tradition than some of her predecessors, and a new round of questions regarding the US role in the region and the world, assuming that Tokyo will persist with status quo policies may not be a safe bet—especially if South Korea opts to adjust its own nuclear status, leaving Japan as the only major non-nuclear weapons power in an increasingly dangerous neighborhood.

The remainder of this article proceeds in five sections. The first briefly reviews the role that nonproliferation has played in US grand strategy and the looming debate over selective proliferation to friendly states. The second discusses the possibility that Japan, despite its longstanding aversion to nuclear weapons, might seriously consider an independent nuclear weapons capability as pressure

on Tokyo mounts from multiple sources. The third section explains the difference between unmanaged and managed proliferation, and how these two alternate paths could influence the costs and risks associated with Japan or any other US ally pursuing nuclear weapons. The fourth section describes China's potential reaction to a change in Japan's nuclear status, as well as the tools that Beijing possesses to attack or coerce Tokyo in that context. The final section draws broader implications of these arguments for US grand strategy and the Japan-US alliance.

Specifically, we explain that although extended deterrence is under growing strains, friendly proliferation is unlikely to reduce those burdens. In fact, it could actually increase them if Washington tries to help allies reach the nuclear threshold quickly, get across it safely, and develop an adequate deterrent, all of which would probably be necessary to keep proliferation from becoming a major cause of instability. A Japan with nuclear aspirations, for example, would be an even bigger target for local rivals, and a nuclear-armed Japan would need tremendous US support to keep those rivals at bay in the nuclear, conventional, and subconventional domains. Ultimately, the better bet for Washington is to continue treating extended deterrence and nuclear non-proliferation as mutually reinforcing objectives, not competing options.

US Grand Strategy and Nuclear Proliferation

Washington's grand strategy of global leadership and engagement rests on several well-known pillars, arguably the most important of which is protecting its many allies and partners across the globe.[3] These extended deterrence commitments have long been a target for critics of US grand strategy, however, who often point to the risks of allies underspending on their own defense, drawing the United States into unnecessary conflicts, and draining American resources.

Concerns about free-riding, entrapment, and overextension might not be new, but they are being raised with renewed vigor on two fronts. First, restrainers often highlight these risks to explain their advocacy for an alternative US grand strategy, one that would entail pulling back from some commitments entirely, scaling back others, and counting on allies and partners (or perhaps former allies and partners depending on their reactions to retrenchment) to manage any instability that might result.[4] Second, and more recently, prioritizers have highlighted a similar set of risks, which has contributed to a situation where American military power is insufficient to meet American security obligations.[5] In particular, they are most worried that US global military engagements in Europe, across the Middle East, and on the Korean Peninsula are diluting the attention and resources that it can devote to competition with the People's Republic of

China (PRC), which is widely viewed as Washington's most powerful and important rival.[6]

Definitions of restraint and prioritization can be fuzzy and the lines between the two can blur. Nevertheless, both camps judge many of Washington's past military interventions harshly, evince skepticism about the utility of some or most legacy US security commitments, and generally want to see a new (and, for Washington, less burdensome) division of labor emerge when it comes to any alliances and security partnerships that remain on the books. Perhaps most importantly, they seem far more open to the idea of selective proliferation than proponents of the grand strategy status quo.

Restrainers and prioritizers seem far more open to the idea of selective proliferation

Some restrainers, for example, have long held that proliferation is an acceptable and perhaps even a desirable consequence of retrenchment—a view that is rooted in the belief that the absolute weapon is the ultimate deterrent, and that even a very small arsenal, unless it is extraordinarily vulnerable, should be sufficient to safeguard owners from most forms of aggression.[7] According to political scientist Harvey Sapolsky and company, "The spread of nuclear weapons does not necessarily threaten the United States. Indeed, the acquisition of nuclear forces by some of our friends will enhance their security and dampen their desire for American guarantees."[8] Likewise, international security expert Barry Posen argued that in a world where the United States embraces restraint and reduces its security commitments, "some nuclear proliferation would be tolerated."[9] This theme has continued to crop up in recent years, as restraint-minded scholars have questioned the merits of adhering to non-proliferation policies, supported nuclear proliferation for a specific nation, or concluded that widespread proliferation is the solution to Washington's security challenges.[10]

Prioritizers might not be quite so quick to endorse selective proliferation, but their underlying arguments point in that direction.[11] Simply put, the spread of nuclear weapons is the most obvious way to shed foreign policy burdens while maintaining a favorable balance of power in the primary theater against China, an adversary that far outmatches its neighbors and that rivals and even surpasses the United States in key areas of the military competition, at least on paper. What's more, even in the prioritized region where Washington concentrates its efforts, proliferation might be required eventually to ensure that allies can maximize their military power in the face of increasingly dire strategic circumstances. Indeed, at least one influential member of this camp has acknowledged that selective proliferation, despite its many downsides, might be a

necessary evil under certain conditions: namely, a situation in which "China might be able to overcome even a consolidated coalition conventional defense and pick apart its members."[12] Under these conditions, nuclear proliferation to allies such as Japan could enhance the strength of the coalition arrayed against China by making nuclear reprisal (both by the immediate target of Chinese aggression and by the United States) a more credible threat in the face of a potential defeat.

The views of restrainers and prioritizers are particularly relevant now thanks to the presence of a political administration in Washington that appears less beholden to foreign policy precedents than its recent predecessors—and policymakers who, at various points, have sent mixed signals when it comes to their willingness to accept some proliferation, especially in East Asia, which in theory could enable some degree of retrenchment, enhance coalition military power, or both.[13] For example, the Trump administration's recent National Security Strategy declared that "the days of the United States propping up the entire world order like Atlas are over."[14] Both that document and the administration's companion National Defense Strategy highlighted the need for "flexible realism," which calls for significant burden-shifting to conserve resources and avoid overstretch.[15] Whether the Trump administration actually implements a major shift in US grand strategy remains to be seen. Yet, the prospect of such a shift has clearly captured the attention of allies and partners, even in regions like East Asia where most observers would expect the United States to remain most engaged. It has also sparked widespread concerns that at least some of those allies and partners might view nuclear proliferation as a necessary fallback plan if Washington requires them to do even more or opts to do less itself.[16]

Saying the Quiet Part Out Loud

At first glance, Japan hardly seems like a candidate for nuclear proliferation, especially in comparison to its neighbor, South Korea. For nearly sixty years, Tokyo has adhered to its Three Non-Nuclear Principles: "not possessing, not producing, and not permitting the introduction of nuclear weapons" onto Japanese territory.[17] Moreover, postwar Japan's normative prohibitions against nuclear weapons, often depicted as a taboo or an allergy, have remained deeply ingrained in the national psyche.[18] Nevertheless, it has often been described as a "latent" nuclear weapons state given the dangerous security environment in Northeast Asia, which could increase pressure on policymakers to one day consider going nuclear—along with its wealth, conventional military strength, advanced space launch vehicle program, nuclear fuel-cycle capabilities, and separated plutonium stockpile, which all make an indigenous nuclear weapons capability technically

plausible. According to one study, Tokyo has long maintained "a quasi nuclear-hedging strategy that would enable a quick-start nuclear-weapons programme," something it has so far been able to avoid thanks to US extended deterrent guarantees.[19]

Japan has also been in the midst of an evolution in security policy, which includes reassessing whether and to what extent it should adhere to norms that have constrained its development and employment of military power in the post-World War II era. Over the past decade and a half, that evolution has led to organizational changes (such as creating a National Security Council), legal changes (such as revising prohibitions on collective self-defense and arms exports), posture changes (such as the fortification of the Southwest Islands), and resourcing changes (such as surpassing the 1 percent of GDP ceiling on annual defense spending and moving toward 2 percent and beyond).

A decision to revise its non-nuclear principles—and especially to pursue nuclear weapons—would be a far more controversial and consequential decision than any of the national security reforms Japan has made to date. Thus far, discussions surrounding any prospective revisions seem geared toward enabling Japan to engage in nuclear-sharing arrangements with the United States, similar to those that exist between Washington and some of its European NATO allies (in which the United States retains custody of nuclear weapons on ally territory but would transfer them to allies for delivery under certain conditions).[20] Of course, domestic debates about Japan's nuclear armament have waxed and waned over the past few decades.[21] But the Russian invasion of Ukraine and President Vladimir Putin's subsequent nuclear saber-rattling drew renewed Japanese attention to nuclear matters. The conflict prompted the late Prime Minister Shinzo Abe to publicly call for a more open discourse on nuclear weapons, including nuclear-sharing arrangements.[22] Later, the former chief of the joint staff, retired admiral Katsutoshi Kawano, wondered out loud whether the US extended deterrence was "really OK."[23] There was a palpable sense in the months after the outbreak of war in Europe that Japan needed to reassess its nuclear options, sparking fleeting but earnest public reflections about nuclear sharing.[24]

More recently, Prime Minister Sanae Takaichi and her administration's statements have attracted media scrutiny at home and abroad. In a November 2025 Diet session, the prime minister hinted at revisiting the language of the three non-nuclear principles as her government revised Japan's key national security documents.[25] The following month, an unnamed advisor to the prime minister's office allegedly declared that Japan "should possess nuclear weapons" in response to a reporter's question.[26] Takaichi later distanced herself from the nuclear-sharing idea and reiterated her commitment to the three non-nuclear

principles.[27] Whether and to what extent Japan will change its nuclear policy remains to be seen, but Tokyo faces pressure from at least four directions that could make an independent nuclear capability increasingly attractive over time.

The first and most proximate source of pressure is North Korea, which continues to amass nuclear weapons and make qualitative improvements to its arsenal. That could increase Pyongyang's ability to use nuclear forces as a tool of intimidation as well as a safety net to deter reprisals when it opts for non-nuclear coercion.[28] The second source of pressure is China, which has embarked on its own nuclear expansion to complement its impressive conventional military modernization. No longer content with a minimum deterrent, Beijing is on pace to significantly narrow the gap between itself, Russia, and the United States when it comes to deployed nuclear warheads, in addition to increasing and updating its inventory of strategic and theater delivery systems.[29]

Tokyo faces pressure toward an independent nuclear capability from at least four directions

The third source of pressure is the United States. Although Tokyo has not been the main target of US efforts to revise alliance divisions of labor or retrench from security commitments, it has not been entirely spared either. American officials have reportedly pushed Japan to increase defense spending well beyond its planned target, from 2 to as much as 3.5 percent of GDP, and pressed for more clarity in how Tokyo would respond to a Sino-US conflict. Washington was also slow to support Prime Minister Takaichi when she indicated shortly after taking office that a Taiwan contingency might indeed merit Japanese military intervention, prompting a hostile reaction from Beijing.[30] Most recently, the US war against Iran is casting doubts on whether the United States truly intends to place more emphasis on the Indo-Pacific and devote greater resources to military competition with China, at least in the near term.

The final source of pressure is South Korea, which has its own reasons to consider altering its nuclear status. Like Japan, but even more so, it is in the crosshairs of North Korea's military machine, including its nuclear arsenal. Seoul also harbors doubts that Washington's extended deterrence guarantees will hold as Pyongyang develops the ability to credibly threaten continental US targets with its nuclear forces despite American missile defenses.[31] Unlike in Japan, however, a large majority of South Korea's public, a smaller but significant minority of strategic elites, and many conservative politicians all support an indigenous nuclear weapons capability.[32] Even some key figures in the United States, including senior US officials, have expressed a willingness to endorse this path.[33] Although South Korea is an American ally and a Japanese security partner, a decision by Seoul to go nuclear would have enormous ramifications

in Tokyo, and could make it far more difficult for Japan to maintain its current status and forgo a nuclear weapons capability.[34] The prospect of remaining the only non-nuclear power in Northeast Asia dependent on the United States for its survival—with all the connotations of abnormality and untrustworthiness that come with such subordination to a foreign power—would likely be intolerable to Japanese leaders.

Threats from North Korea and China (which have only increased as their conventional and nuclear arsenals have grown), concerns about US reliability (which have only been magnified by the war with Iran), and the possibility of a South Korean nuclear program (which could perhaps appear acceptable to a US administration that is looking to reduce its military commitments on the Peninsula) are potent sources of pressure. Given that all four are converging on Japan at once, it is not surprising that analysts and government officials have been raising the prospect of acquiring nuclear weapons more frequently, unnerving nonproliferation proponents.[35] A decision by Tokyo to go nuclear would be transformative, altering the balance of power in the region and potentially shattering the global nonproliferation regime. But might it somehow serve US interests, particularly as Washington attempts to juggle the emergence of China, a great power military peer, with its legacy rivalries and longstanding security commitments across the rest of the world? In reality, the temptation to condone allies or partners joining the nuclear club often rests on caricatures about the risks of pursuing a nuclear arsenal, the viability of minimal deterrence, and the extent to which a nuclear arsenal can solve a state's security problems.

Unmanaged Versus Managed Proliferation

If US policymakers eventually accept the proposition that more nuclear powers—at least, more friendly nuclear powers—would indeed be a net positive for American security, they could adopt two fundamentally different approaches to realizing this vision. The first is unmanaged proliferation. In this case, Washington would not attempt to slow or stop an aspiring nuclear power, nor would it necessarily provide significant financial resources, technical support, diplomatic cover, or other forms of assistance that might help a state get across the nuclear threshold as quickly and safely as possible. The hope, therefore, would be that Washington could reap the ostensible benefits of friendly proliferation (namely, allies and partners that enjoy a secure strategic deterrent) without

Unmanaged proliferation would introduce three enormous risks

absorbing significant costs along the way. The problem, however, is that unmanaged proliferation would introduce three enormous risks.

First, and perhaps most important, it would open a window of opportunity for hostile states to disrupt a nascent nuclear program—assuming the existence of that program was not, or did not remain, a secret. The acquisition of nuclear weapons undoubtedly would shift the balance of power between a proliferant and its rivals. Consequently, those rivals would have significant incentives to avoid losing ground. In extreme circumstances, this could be the catalyst for a military campaign to snuff out a nuclear program before weaponization occurs. This option was embraced by Israel in 1981 against Iraq, and again in 2007 against Syria, as well as by Israel and the United States in 2025 and 2026 against Iran. Both states also considered it seriously with respect to emerging nuclear rivals at various other points.[36] Even if the costs of a military attack appear too high, hostile states could still pursue a variety of other avenues to disrupt a nuclear program less directly including political warfare, economic coercion, and sabotage. Moreover, if the perceived rationale for nuclear proliferation was declining confidence in Washington's security commitment, then the barriers to aggressive counterproliferation in one form or another might be dangerously low.

Second, assuming an aspiring proliferant made it across the nuclear threshold, it could enter a valley of vulnerability relative to nuclear-armed rivals with larger arsenals, more delivery systems, and a desire to preserve their nuclear superiority if possible—and to exploit it if given the opportunity. Put differently, states that believe they have escalation dominance over a rival will be loath to relinquish it and may even use it as leverage in peacetime competition, as a tool of intimidation during a crisis, or for warfighting advantage during a conflict.[37] That, in turn, would put added pressure on a new nuclear weapons state to continue expanding its capabilities and avoid being in a perpetual situation of relative weakness. Of course, true believers in minimal deterrence might not care about relative force comparisons and therefore could be content with a modest arsenal under these circumstances. But, as political scientist Peter Feaver notes, no nation "has ever relied on existential or minimum deterrence for very long." Instead, all emerging nuclear powers eventually demonstrated "a proclivity for worst-case strategizing" that led to a "distrust of existential deterrence schemes."[38]

Third, even if a friendly state crossed the nuclear threshold, developed a secure strategic deterrent, and maintained an arsenal that was sufficient to discourage nuclear coercion or nuclear attack by its rivals, it could still find itself entering a prolonged period of instability. Although nuclear weapons are generally expected to make nuclear conflict unlikely, if not unthinkable, they can also exacerbate the risks of conventional or subconventional conflict—as

captured by the well-known "stability-instability paradox."[39] Under conditions of mutual strategic vulnerability, strong confidence in an escalation ceiling can actually remove barriers to aggression, as revisionist states might feel free to probe their rivals or even mount a direct challenge to the status quo, especially if they enjoy military advantages when it comes to conventional or irregular forces.

This concern would be particularly acute for a state which was compelled to cap or roll back defense spending to afford its nuclear capability. Even for a wealthy and technologically advanced nation like Japan, a nuclear weapons program would be an enormous expense. The more targets it needs to hold at risk and the more survivable its own arsenal needs to be (both of which could be significant cost-drivers for Tokyo given that it faces multiple nuclear-armed rivals with significant nuclear capabilities), the greater the potential opportunity costs when it comes to other defense investments. Barring a massive increase in spending beyond what Japan has already embraced, these knock-on effects could leave it more exposed to conventional or subconventional threats, which the prospect of a nuclear reprisal might not deter. The bottom line is that unless an aspiring proliferant could develop a robust nuclear arsenal in a very short period of time without sacrificing other critical military capabilities, unmanaged proliferation would be an extremely risky proposition.

The alternative, of course, is that the United States could adopt a second approach: managed proliferation. In this case, Washington could provide a friendly state with the technical assistance and military arms needed to dramatically shorten the timeline for achieving a viable nuclear deterrent. It could also continue that support over time to ensure that a new nuclear-weapons state is a better match for its rivals. Perhaps even more important, it would maintain and perhaps even invigorate its extended deterrence commitment, for three reasons: to shield a friendly state from any efforts to disrupt or destroy its nuclear program before it comes to fruition; to supplement that program so that rivals do not enjoy escalation dominance; and to ensure that the pursuit of nuclear weapons does not result in greater vulnerability to non-nuclear aggression. The problem with managed proliferation, though, is that it sacrifices the very benefits that make proliferation appealing: namely, the ability to step back from existing commitments once allies or partners are more capable of deterring threats and defending themselves. In fact, managed proliferation could have the opposite effect.

Managed proliferation sacrifices the very benefits that makes friendly proliferation appealing

Counterproliferation with Chinese Characteristics

Among the powers that would oppose Japan's nuclearization, China stands out as an illustrative case because it has powerful incentives and an array of means to deter or, failing that, reverse a breakout. China has long been highly sensitive to any developments which could undermine its deterrent posture. A Japanese nuclear breakout, however, would represent an entirely different—and far more acute—order of danger. Beijing's supercharged threat perceptions about Tokyo, animated by historical acrimony, would magnify its fears of a hostile proliferator next door. Few on the mainland have doubts that Tokyo possesses the will and the means to go nuclear.[40] Many hold deep suspicions about Japan's commitment to nonproliferation and believe that it maintains a hedging policy in the form of a latent nuclear weapons capability.[41] And they express grave misgivings about malign Japanese domestic political forces that would push the country across the nuclear threshold.[42] Such profound distrust of Tokyo likely reinforces Beijing's unwillingness to accept mutual vulnerability vis-à-vis Japan.

Growing concerns beginning in late 2025 that Tokyo might revisit its three non-nuclear principles spurred a major public relations blitz, one that underscored Beijing's hypersensitivity to Japan's nuclear status. A January 2026 joint report by the China Arms Control and Disarmament Association and the China Institute of Nuclear Industry Strategy perhaps best captures Beijing's mindset. The authors of the study claim that the moves to loosen nuclear constraints are the result of "long-standing, carefully orchestrated efforts by Japan's right-wing forces."[43] To them, the apparent purposeful ambiguity surrounding Takaichi's position on the non-nuclear principles, along with an unnamed official's admission that Japan should possess nuclear weapons, were meant to test the resolve of the international community. They further speculate that, "in the long run, the possibility of Japan pursuing nuclear weapons cannot be excluded."[44] The report goes on to warn that Japan's nuclear ambitions would trigger an arms race, heighten the risk of miscalculation in crises, and destabilize the global strategic balance.

China would assuredly resist any Japanese attempt to develop nuclear weapons

Hyperbole, of course, is the norm in Chinese public diplomacy. But the study's depictions of nefarious political actors in Tokyo bespeak a deeply rooted tendency to assume the worst of Japan. Even if Western observers remain inclined to dismiss the likelihood of a Japanese breakout, the Chinese clearly take such a possibility with utmost gravity. China would assuredly resist—and indeed refuse to tolerate—any Japanese attempt to develop nuclear weapons. To the extent that the report's findings reveal a prejudicial reflex

about all things related to Tokyo's defense policy, then China would likely be willing to entertain coercive options, including force, to deter or reverse what it would regard as a nightmare scenario.

First, Beijing could employ non-military means to disrupt or impose costs on Japan's nuclear breakout. Since at least 2010, China has pulled economic levers to punish neighbors it deemed hostile to its interests. Those on the receiving end of Chinese reprisals have included Japan, the Philippines, South Korea, and Australia. In 2016 and 2017, for example, China curtailed tourism, boycotted goods, and applied regulatory pressure to punish South Korea for agreeing to the deployment of the US Terminal High Altitude Area Defense (THAAD) anti-missile system on its territory.[45] Beijing's economic punishment was, in part, out of concern that missile defense on the peninsula would undermine its nuclear deterrent. Most recently, Prime Minister Takaichi's refusal to retract her response to an inquiry during a November 2025 Diet session that a Chinese use of force against Taiwan would constitute a "survival-threatening situation" to Japan prompted a series of retaliatory actions: China imposed export bans on dual-use goods destined for Japan, banned imports of Japanese seafood, initiated an anti-dumping investigation on Japanese chipmakers, and restricted tourism.[46]

China could combine economic pressure with a disinformation counteroffensive. Well-practiced propaganda tactics would almost certainly be employed to oppose Japan's nuclearization. Following Takaichi's statement about Taiwan, for instance, Beijing's "wolf warrior" diplomacy, state media outlets, and social media platforms went into overdrive to denounce the Japanese prime minister.[47] Beijing could also politically divide the Japanese body politic through "united front work," namely, political activities designed to shape the perceptions and behaviors of citizens and foreigners alike in ways which align with China's interests. United front organizations and their affiliates—including associations which ostensibly promote cross-strait unification, cultural exchanges, and trade—have operated in Japan for decades.[48] These agents of influence could mobilize domestic opposition to sow discord in Tokyo's decision-making calculus. Tellingly, a Chinese study on Japan's nuclear ambitions calls on Beijing to exploit non-governmental organizations, such as Japan-China friendship associations and sister city partnerships with Hiroshima and Nagasaki, to "influence Japanese public opinion."[49]

Second, thanks to decades of rapid modernization efforts, Beijing could wield its conventional military and paramilitary tools to signal its resolve or to compel Japan to cease and desist. Through displays of force, the People's Liberation Army (PLA) could telegraph the potentially unbearable costs which Japan could incur should it continue down the path of nuclearization and thereby convince Tokyo to reverse course. This coercive tactic involving peacetime uses of military power

is consistent with PLA theory and practice.[50] The concept of "strategic deterrence" holds that China could employ conventional, cyber, space, and nuclear weapons to "create an atmosphere of war" or engage in shows of force to intimidate the adversary, inducing it to back down.[51] Strategic deterrence, furthermore, encompasses military actions short of war, including electronic warfare and satellite jamming, military operations to interfere with the opponent's freedom of movement, and warning shots to bend the rival to Beijing's will. The PLA's large-scale exercises since 2022 around Taiwan—simulating blockades, air and missile raids, and amphibious operations—are cases of such demonstrations of will.[52]

Beyond opposing nuclearization directly, China could pursue a strategy of linkage by holding hostage other objects that Tokyo values to bring it to heel. In other words, Beijing could pick fights elsewhere to knock Japanese leaders off balance. China's coast guard and maritime militia—the largest fleets of their kinds—could ramp up their operations or sustain their presence indefinitely around the disputed Senkaku Islands to undermine Japan's claims of administrative control of the terrain and surrounding waters. Indeed, China demonstrated its ability to flood the zone in the East China Sea by coordinating and amassing over 1,400 fishing boats to form a 200-mile vertical floating barrier there in January 2026.[53] Beijing could even threaten to land personnel on the Senkakus to significantly raise the stakes of the territorial dispute. There is historical precedent for such an asymmetric tactic. In 1958, Mao Zedong ordered the massive artillery bombardment of Kinmen, a tiny offshore island, as a proxy crisis, in part to test US commitments to Taipei and to signal his risk tolerance over Taiwan's fate.[54] Contemporary PLA doctrine remembers the Cold War confrontation as a successful case of brinkmanship that deterred the United States from escalating further.[55]

Chinese leaders could ultimately order a preemptive strike to destroy Japan's nascent nuclear arsenal, especially if it concluded that Japan's nuclear aspirations reflected a fraying of the Japan-US alliance, thus dampening the deterrent value of Washington's security commitment to Tokyo. To be sure, such a move would entail serious risks and uncertainties, including spiraling escalation, which Beijing must regard with utmost seriousness. Nevertheless, China possesses the military tools to carry out a long-range disarming attack, assuming it knows where key elements of the program are located. The PLA Rocket Force, for example, fields numerous precision-strike missiles with ranges of up to 2,000 kilometers, such as the DF-17 medium-range ballistic missile and the CJ-100 ground-launched cruise missile, that can hold at risk targets along the entire Japanese archipelago.[56] The Pentagon judges that the PLA's sensor architecture can support effective strike operations as far as 2,000 nautical miles from the mainland, a range that comfortably covers Japan's home islands.[57] Moreover, Chinese military doctrine does not preclude preemption at the operational and tactical levels of war in response to strategic and political attacks against

China's core interests.[58] As the 2020 *Science of Military Strategy* asserts, "When national territorial sovereignty is violated, national unity is challenged, and national development interests are threatened, our country *has the right to use military means at any time* [emphasis added]."[59]

Third, on an exclusively bilateral basis, China's nuclear superiority over Japan magnifies the intimidation factor behind its coercive threats, serves as the ultimate backstop to its conventional military options, and furnishes another way to strongarm Tokyo. Between 2020 and 2025, China tripled its nuclear arsenal from some 200 nuclear warheads to about 600. This stockpile is expected to grow significantly over the next five years. The Pentagon depicts China's modernization efforts as a "massive nuclear expansion" and assesses that "the PLA remains on track to have over 1,000 warheads by 2030."[60] Analysts from the Federation of American Scientists similarly find that "China's nuclear expansion is among the largest and most rapid modernization campaigns of the nine nuclear-armed states."[61] In February 2026, US Assistant Secretary of State for the Bureau of Arms Control and Nonproliferation Christopher Yeaw claimed that China may achieve comparable deterrent capability vis-à-vis the United States by the early 2030s.[62]

At the same time, China has developed a larger and more diverse theater nuclear arsenal that can hold at risk regional targets in the Indo-Pacific. This nuclear-capable precision-strike arsenal includes the DF-26 intermediate-range ballistic missile (IRBM) and the JL-1 air-launched ballistic missile (ALBM). As the Pentagon's latest report on Chinese military power states, "Of China's currently fielded systems, the DF-26 IRBM and the H-6N's ALBM are both highly precise theater weapons that would be well suited for delivering a low-yield nuclear weapon."[63] Such highly accurate, low-yield nuclear options would enable Beijing to make increasingly credible limited nuclear threats against local frontline states like Japan.[64] PLA doctrine confirms that the maneuvering of China's nuclear triad constitutes an element of strategic deterrence to force its rivals to back down or reverse course.[65]

China's large and growing family of coercive tools exposes Japan to exactly the three kinds of unmanaged proliferation risks described above. Beijing can mix and match its economic, political, conventional, and nuclear weapons to disrupt the various stages of a Japanese nuclear breakout before the window of opportunity slams shut. It has the flexibility to dial up and turn down the pressure depending on Beijing's perceived needs. It can apply steady, unremitting pressure to erode Japan's will while the possibility of military preemption looms in the background. These coercive actions, moreover, would be taking place under China's nuclear shadow, the ultimate backstop to its strong-arming tactics. Taken together, China enjoys escalation dominance over Japan, meaning that China's superior military prowess allows it to climb the escalation ladder

higher than Japan. Beijing's ability to escalate further than Tokyo enables the Chinese side to threaten to impose unacceptable costs on the Japanese side, bargain from a position of strength, and walk back its threats in tune with Japan's concessions.

> Beijing can mix economic, political, conventional, and nuclear weapons to disrupt Japan

Even if Japan were to reach escape velocity in its nuclear breakout, Beijing's overwhelming nuclear superiority in numbers and quality would likely raise the bar, perhaps substantially, for what might constitute a satisfactory deterrent for Japanese planners. To achieve a level of sufficiency that meaningfully ensures mutual vulnerability, Tokyo might have to invest in a far larger, more diverse, and more survivable nuclear force structure and posture than presumed. In short, Japan would have to cross a deeper and longer valley of vulnerability relative to China than it would otherwise prefer. And even if Tokyo were to field a credible second-strike capability, it would still not deter Chinese coercion that fell short of war—including demonstrations of force, economic reprisals, and political warfare—which Beijing has practiced and honed against other rivals in recent years. If Japan were to divert substantial resources to the breakout at the expense of conventional military modernization and other national capabilities, such as the coast guard, then it might remain vulnerable to those threats which the nuclear shield is inadequate to deter. In other words, crossing the nuclear threshold would not be the end of the story. Rather, it would be the beginning of stark decisions and trade-offs for Japanese leaders as they balance competing resource demands under persistent duress.

China's imperative to preserve its nuclear superiority, its hypersensitivity to Japan as a potential nuclear rival, and its many tools that were unavailable to it just a generation ago suggest that Beijing will likely go to great lengths to maintain its preferred status quo. And given the time and expense that Japan would need to go nuclear, China could pursue a counterproliferation strategy of protracted, multifaceted resistance designed to chip away Japan's will. If so, the United States would face two stark choices: either help Tokyo cross the valley of vulnerability at considerable expense and risk to itself, or accept the dangers that come with Japan going it alone, including a Chinese preventive war. The costs of friendly proliferation could well exceed the benefits presumed by the restrainers and prioritizers.

Conclusion

Support for nuclear non-proliferation has long been one of the most widely and deeply held views within the US national security community, one that has

influenced everything from diplomacy to decisions on the use of force. Yet, the erosion of American military dominance and the rise of more capable rivals—and the strains these two related trends have put on legacy security commitments—have started to weaken support for this norm. As Washington faces more challenges when it comes to managing its commitments, and especially if policymakers seriously pursue selective retrenchment, pressure might grow further on allies and partners to embrace extraordinary measures, and on the United States to condone or even enable those measures.

The emerging debate over friendly proliferation reveals two notable paradoxes, however, both of which are evident when looking at this debate through the lens of the Japan-US alliance. First, for the United States, any potential benefits of nuclear proliferation would be highly dependent on Washington assuming the very costs and risks that friendly proliferation would be meant to offset. To avoid a situation where an ally or partner became the target of aggression due to its nuclear aspirations, Washington would have to embrace a managed proliferation strategy to help get a state safely across the nuclear threshold, make up for the shortfalls of its limited arsenal, and perhaps even shield it from other threats to its security. Yet the effort, resources, and risks associated with managed proliferation would largely defeat the very purpose of friendly proliferation, if the goal were indeed to reduce the burdens of preserving regional stability.

The emerging debate over friendly proliferation reveals two notable paradoxes

Second, for a state like Japan, the very conditions that make proliferation more tempting also seem to put it far out of reach. To the extent that the expanding nuclear capabilities of local rivals make an independent nuclear deterrent more relevant, Tokyo would be starting down this road from a position of severe disadvantage, unless it were to truly embrace minimal deterrence. Moreover, to the extent that any questions about US credibility and reliability add to the appeal of an independent arsenal, it would be pursuing that option without a significant safety net.

Ultimately, the demands of extended deterrence are and will remain significant. They will also continue to spur necessary discussions about how allies and partners can enhance their strength, and how Washington can adapt its division of labor with those states. It is, however, necessary to judge those demands relative to their alternatives. In this case, extended deterrence—even reinvigorated commitments which aim to enhance alliance strength and reduce proliferation incentives—may turn out to be far cheaper than a path-breaking,

dangerous, expensive, and not-so-quick fix, whether the US seeks to manage it or not.

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