



Takaichi's Misplaced Hedging

Yao Bowen



RSIS Commentary is a platform to provide timely and, where appropriate, policy-relevant commentary and analysis of topical and contemporary issues. The authors' views are their own and do not represent the official position of the S. Rajaratnam School of International Studies (RSIS), NTU. These commentaries may be reproduced with prior permission from RSIS and due credit to the author(s) and RSIS. Please email to Editor RSIS Commentary at RSISPublications@ntu.edu.sg.

Takaichi's Misplaced Hedging

By Yao Bowen

SYNOPSIS

Japanese Prime Minister Takaichi's remarks about Taiwan triggered an unusually severe backlash from the Chinese, exposing a hedging strategy built on offsetting signals than calibrated ambiguity. By pairing hawkish rhetoric with conciliatory gestures, she lost credibility in Beijing and faced unreliable US reassurance. The episode shows that hedging fails when ambiguity is no longer tolerated.

COMMENTARY

In November 2025, Japanese Prime Minister Sanae Takaichi arguably caused the worst decline in Sino-Japanese relations in years when she stated in the Diet that a Chinese attack on Taiwan could pose a threat to Japan's survival. This situation might allow for the limited use of collective self-defence under Japan's security laws. Beijing's response was swift and expansive: exchanges were suspended, economic countermeasures imposed, and Tokyo was urged to retract what China described as a "[dangerous signal](#)". Diplomatic damage control failed, and by December, the dispute had escalated into military signalling and bilateral confrontation.

This episode is best understood not as an accidental blunder, but as the unravelling of a misplaced hedging strategy.

Hedging in international relations refers to a strategy in which states caught between competing powers pursue mixed, sometimes contradictory policies: combining resistance with reassurance to manage risk. Unlike straightforward balancing or bandwagoning, hedging does not rely on consistency alone, but on the careful orchestration of signals across domains. Japan has long relied on [strategic ambiguity](#), particularly on Taiwan, to navigate the US–China rivalry. Takaichi departed from this approach.

Unlike her predecessors, who sought to preserve ambiguity through rhetorical restraint, Takaichi replaced ambiguity with offsetting signals. She paired openly hawkish remarks on Taiwan, which she has so far [declined to revise or retract](#), with conciliatory gestures toward Beijing: [dispatching an envoy](#) to China, repeatedly describing China as an “[important neighbour](#),” and insisting that her commitment to stable relations remained unchanged. This was not ambiguity, but hedging – assertion in one channel, reassurance in another.

Domestically, the strategy made sense. Takaichi’s political identity has long rested on a hard-line security posture. A firm stance on Taiwan resonated with conservative voters concerned about China’s growing military power, while conciliatory diplomacy was meant to cap external fallout. Based on Beijing’s previous approach, Takaichi appears to have assumed that retaliation would remain largely symbolic or economically manageable.

That assumption proved wrong. By December, Chinese fighter jets had directed fire-control radar at Japanese aircraft near Okinawa, prompting Tokyo’s protest and an unusually direct US rebuke of Chinese conduct. China also [intensified the dispute](#) at the United Nations by portraying Japan as a threat to regional stability. These reactions revealed more than mere anger at the statements made. Takaichi’s remarks touched two of Beijing’s most sensitive issues simultaneously: Japan’s wartime legacy and Taiwan’s sovereignty. In such circumstances, restraint was politically costly for China’s leadership.

[Public opinion](#) in Japan proved more nuanced than either critics or supporters suggested. Polls showed that a plurality regarded Takaichi’s remarks as appropriate, while a similarly large share remained undecided. This ambiguity blunted domestic pressure for retreat without providing a clear mandate for escalation. Rather than forcing a reversal, domestic opinion reinforced Takaichi’s existing posture.

The United States further complicated Japan’s hedging strategy. President Donald Trump [reportedly](#) urged Takaichi to moderate her rhetoric after first speaking with President Xi Jinping, reflecting his preference for transactional stability over geopolitical confrontation. Although Washington later reaffirmed alliance commitments following the radar incident, Trump’s sequencing highlighted a deeper problem for Tokyo: US support was reactive, not strategic. For a hedging strategy to succeed, reassurance from an ally must be predictable. Under Trump’s transnationalist style, focused on deal-making and downplaying rivalry, such reassurance was not.

Takaichi’s “iron-lady” image worsened the situation. By emphasising toughness, she had little chance to soften her approach without looking weak at home. However, this toughness hurt her credibility abroad. In Beijing, her repeated claims of goodwill, without any change in policy, came across as tactical rather than sincere. For hedging to work, credibility is needed on both sides, and Takaichi gradually lost it in both.

The takeaway is not that hedging no longer matters, but that it works under certain conditions. As nationalism increases, legal boundaries tighten, and support from

allies becomes shaky, the chances for mixed messaging decrease significantly. In such cases, replacing uncertainty with hedging may lead to escalation instead of containing it.

Takaichi's experience demonstrates the limitations of risk-management strategies in today's East Asia. Hedging can handle uncertainty only when all parties involved accept some ambiguity. When this acceptance falls apart, hedging stops protecting against risk and instead creates it.

Yao Bowen is a PhD candidate at the S. Rajaratnam School of International Studies (RSIS), Nanyang Technological University (NTU), Singapore. His research focuses on Hedging Strategy, International Relations theory, International Relations history, and the international politics of China and Southeast Asia.

S. Rajaratnam School of International Studies, NTU Singapore
Block S4, Level B3, 50 Nanyang Avenue, Singapore 639798

Please share this publication with your friends. They can subscribe to RSIS publications by scanning the QR Code below.

