

JAPAN 2024-25: HELMED BY A PRECARIOUS MINORITY GOVERNMENT

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Due to a reduced presence in the Diet following the last national election, the minority government in Japan cannot pass the budget or other legislations in the Lower House unless it can garner support from opposition parties. If the Liberal Democratic Party (LDP) were to perform very poorly in the July 2025 Upper House election, Prime Minister Ishiba Shigeru may resign as LDP president and Japanese prime minister. To shore up support, Ishiba's policy agenda includes public policy to provide incentives for more births and accepting more foreign workers for the Japanese economy, while continuing with the push for economic growth. Things have started on a right note with the Trump administration, thanks to Foreign Minister Iwaya Takeshi's diplomacy with Secretary of State Marco Rubio and Son Masayoshi's business dealings with Trump. China is also poised to lift its ban on Japanese seafood and granting visa-free travel to Japanese citizens again. Meanwhile, even if Ishiba cannot hold on to power, the next administration and an efficient bureaucracy are likely to maintain the trajectory for growth in the revived semiconductor and tourism sectors.

(Click on the link to read the above in [Chinese](#), [French](#), [Japanese](#) and [Spanish](#))

Chinese:

日本 2024-25：由不稳定的少数派政府掌舵

由于在上次全国大选后在国会中的席位减少，日本的少数派政府无法在众议院通过预算或其他立法，除非它能够获得反对党的支持。如果自由民主党（LDP）在 2025 年 7 月的参议院选举中表现非常不佳，首相石破茂可能会辞去自民党总裁和日本首相的职务。为了巩固支持，石破的政策议程包括为更多生育以及接纳更多国外劳动力进入日本经济提供激励措施的公共政策，同时继续推动经济增长。得益于外相岩屋毅与国务卿马可·鲁比奥的外交以及孙正义与特朗普的商业往来，与特朗普政府的关系已顺利开启。中国也准备解除对日本海鲜的禁令并再次给予日本公民免签旅行。同时，即使石破无法继续掌权，下一届政府和高效的官僚机构也可能在复兴的半导体和旅游业中保持增长轨迹。

French:

JAPON 2024-25: UN GOUVERNEMENT MINORITAIRE ET FRAGILE A LA BARRE

En raison d'une présence affaiblie à la Diète à la suite des dernières élections nationales, le gouvernement minoritaire au Japon n'est pas en mesure de faire passer le budget ou d'autres législations à la Chambre basse sans l'obtention du soutien des partis d'opposition. Si le Parti libéral-démocrate (PLD) devait obtenir de très mauvais résultats aux élections de la Chambre haute de juillet 2025, le Premier ministre Ishiba Shigeru pourrait démissionner de son poste de président du PLD et de Premier ministre du Japon. Pour renforcer sa base, l'agenda politique d'Ishiba comprend des politiques publiques natalistes et l'acceptation de davantage de travailleurs étrangers, tout en poursuivant la croissance économique. Les choses ont commencé d'un bon pied avec l'administration Trump, grâce, d'une part, à la diplomatie du ministre des Affaires étrangères Iwaya Takeshi avec le secrétaire d'État Marco Rubio, et d'autre part aux transactions commerciales de Son Masayoshi avec Trump. La Chine est également prête à lever son interdiction sur les produits japonais de la mer et à rétablir les exemptions de visa pour les citoyens japonais. Par ailleurs, même si Ishiba ne peut pas conserver le pouvoir, la prochaine administration, forte d'une bureaucratie efficace, devraient probablement maintenir le cap sur la croissance dans les secteurs revitalisés des semi-conducteurs et du tourisme.

Japanese:

2024-25 年の日本：不安定な少数派政権が主導

前回の総選挙後、国会での存在感が弱まったため、少数与党が野党の支持を集められなければ、衆議院で予算案やその他の法案を可決することはできない。また、2025 年 7 月の参議院選挙で自民党の成績が振るわなかった場合、石破氏

は自民党総裁と首相を辞任する可能性がある。支持を固めるため、石破氏の政策アジェンダには、経済成長の推進を継続しながら、出生率向上や外国人労働者の受け入れを促進する政策が含まれている。幸い、岩屋毅外相のマルコ・ルビオ国務長官との外交や孫正義氏のトランプ氏とのビジネス取引のおかげで、トランプ政権との関係は良好な状態になり始めている。中国も日本産水産物の禁輸措置を解除し、日本人へのビザなし渡航を再び認める構えだ。一方、石破氏が政権を維持できなくても、次期政権と有能な官僚機構は、復活した半導体や観光産業の成長軌道を維持する可能性が高い。

Spanish:

Japón 2024-25: Gobernado por un Gobierno Minoritario Precario

Debido a una presencia reducida en la Dieta tras las últimas elecciones nacionales, el gobierno minoritario en Japón no puede aprobar el presupuesto u otras legislaciones en la Cámara Baja a menos que pueda obtener el apoyo de los partidos de oposición. Si el Partido Liberal Democrático (PLD) tuviera un desempeño muy pobre en las elecciones de la Cámara Alta en julio de 2025, el Primer Ministro Ishiba Shigeru podría dimitir como presidente del PLD y primer ministro japonés. Para consolidar el apoyo, la agenda política de Ishiba incluye políticas públicas para proporcionar incentivos para más nacimientos y aceptar más trabajadores extranjeros para la economía japonesa, mientras continúa impulsando el crecimiento económico. Las cosas han comenzado con buen pie con la administración Trump, gracias a la diplomacia del Ministro de Asuntos Exteriores Iwaya Takeshi con el Secretario de Estado Marco Rubio y los tratos comerciales de Son Masayoshi con Trump. China también está preparada para levantar su prohibición sobre los mariscos japoneses y conceder nuevamente viajes sin visado a los ciudadanos japoneses. Mientras tanto, incluso si Ishiba no puede mantener el poder, es probable que la próxima administración y una burocracia eficiente mantengan la trayectoria de crecimiento en los sectores revitalizados de semiconductores y turismo.

Executive Summary

1. Prime Minister Ishiba Shigeru came into power as an outsider to mainstream party factions. While he was untainted by scandals, he was marginalised by the once-powerful Abe faction in Abe's cabinet and now by Abe's former faction members.
2. Ishiba in 2025 faces a major hurdle when the fiscal 2025 budget is to be debated in the Budget Committee of the House of Representatives in April 2025 as the Liberal Democratic Party (LDP) no longer has a majority in the lower house.
3. Out of the 17 lower-house standing committees, including the Budget Committee, seven are headed by the opposition parties. The ruling parties will not be able to pass legislation in these committees without the assistance of the opposition, compelling LDP to consider demands for revisions.
4. Therefore, Ishiba will be very busy with garnering public support by early spring 2025 to attain reasonable approval rates while mitigating internal party worries to survive politically as prime minister. He will also seek to secure ongoing support from the Democratic Party for the People (DPFP) as either a new coalition partner or an extra-cabinet collaborator on aligned issues.
5. In October 2024, Ishiba allocated 5.3 trillion yen (about US\$34 billion) in 2025 to assist young families, followed by an annual 3.6 trillion yen to extend child allowances and boosting childcare/education support from 2026 to 2029.
6. Japan is priming its immigration policies with relaxed visa rules to import manpower for elder care and agricultural industries, and to let foreign workers stay longer, change occupations and bring their families over to Japan eventually.
7. Trump's new Secretary of State Marco Rubio quickly met Quad members (Australia, India and Japan) right after swearing-in as the new secretary. They were the first foreign leaders that Trump's diplomatic and security teams met after taking power. Japanese Foreign Minister Iwaya also met National Security Adviser Mike Walz.

8. Tokyo will seek to boost engagement with like-minded Southeast Asian countries like Indonesia, Malaysia, Philippines and Vietnam. Ishiba made a point to visit Malaysia (current rotated ASEAN chair) and Indonesia as his first two bilateral visits, reflecting the importance of ASEAN to Japan.
9. Japan has warmed up ties with China and entered Beijing's 'circle of friends' visa-less travel partnership. It is also planning to chair/host the Northeast Asian trilateral meeting while preparing for an official visit by Premier Li Qiang and a possible visit by President Xi Jinping as well.
10. Even if there is a change in leadership, Japan's tourism and chipmaking industries will be chugging along fine under an effective bureaucracy, as in the past.