Adjusting to a Scary New World: U.S. Retrenchment and Japan's Deepening Dilemma

By Sayuri Romei

Several international leaders have used the word "multipolarity" to describe the current state of international relations. China and Russia, unsurprisingly, use the term to indicate a preferred alternative world order that is not dominated by the United States. Russian President Vladimir Putin, for example, claimed at the 2024 BRICS summit that the "process of forming a multipolar world is under way." Chinese Foreign Minister Wang Yi has also emphasized a "trend" toward a multipolar world. Other leaders, such as French President Emmanuel Macron and Brazilian President Luiz Inácio Lula da Silva, claim that not only is the world now multipolar, but a multipolar world is desirable. Macron explicitly stated that the world is now multipolar, often encouraging Europe to seek strategic autonomy and become a "third superpower." German Chancellor Olaf Scholz echoed similar sentiments in 2023, urging Europe to capitalize on multipolarity by seeking more global cooperation on equal terms.

This rhetoric certainly resonates with those who criticize the United States as an imperialist power. The discourse on multipolarity may also attract and resonate with U.S. allies and partners who see a decline in U.S. power and believe it is time to move away from a system where they are completely reliant on the United States.

Japan, however, is a clear exception. Japan's 2024 annual defense white paper opens ominously: "The international community has entered a new era of crisis...The existing order is being seriously challenged. Japan finds itself in the most severe and complex security environment of the postwar era." Although the white paper does not explicitly mention multipolarity, Japan is deeply worried about the implications of the United States losing its so-called unipolar moment. Among all seventeen countries surveyed in the 2025 Munich Security Index, Japan recorded the highest degree of anxiety about a future in which the United States is not the dominant power. According to the index, 54 percent of Japanese respondents indicated that they were "concerned" about the prospect of a multipolar world, compared to 33 percent of U.S. respondents and 24 percent of Chinese respondents. The survey also showed a higher proportion of Japanese respondents still believing in U.S. primacy. In response to the question of whether "we live in a world in which the U.S. is still the dominant superpower," 45 percent of Japanese respondents responded in the affirmative compared to an average of 32 percent across other countries.

Japanese respondents also believe the least that "we live in a world in which powers beyond the U.S. and China can have a strong and independent influence on global affairs" (9 percent compared to the average of 24 percent). Moreover, the survey reveals that Japan is the most pessimistic about a multipolar world being more peaceful (-20) compared to the United States (+19) and, of course, China (+41). From Japan's perspective, a shift toward a multipolar world carries serious consequences for three

Dr. Sayuri Romei is Senior Fellow in the Indo-Pacific program at the German Marshall Fund in Washington, D.C., where she leads work on Japan and heads the Japan Trilateral Forum.

foreign and security policy goals: preserving the liberal international order; maintaining a strong U.S.-Japan alliance and a strong U.S. engagement in the Indo-Pacific; and strengthening economic security.

Japan is a status quo power *par excellence*, as it has greatly benefited from the unipolar post-Cold War era, where the United States was the preeminent power. As stated numerous times by Japanese officials, Japan's main objective is to uphold the liberal international order based on the rule of law and to fight against any attempts to subvert it. Japan's 2022 *National Security Strategy* posits that maintaining the rule of law and an international order based on international law is one of the country's fundamental national interests. The cornerstone of Japan's postwar foreign policy has been its sole military alliance—the U.S.-Japan alliance. However, since Donald Trump's first term in office, debates have emerged in Tokyo about the future of the alliance and to what degree it is necessary to prepare for a new world where the United States is no longer the hegemonic power. In the words of the late political scientist Makoto lokibe in 2019, "[Japan] always somewhat thought that the U.S.-Japan alliance would last forever, but with the arrival of someone like President Trump, that is not the case. There is no such thing as an eternal alliance."

As prime minister, Shinzo Abe somewhat successfully weathered the first Trump administration by establishing a strong personal rapport early on, yet lokibe's assessment rings true for an increasing number of policymakers in Tokyo. Trump's reelection in 2024 confirms that the "America First" approach to foreign policy is not an aberration and may be the new norm for U.S. and international politics. Trump 2.0 is already affecting how European and Indo-Pacific allies perceive the United States, and the new administration's rhetoric and policies will have major consequences for partners worldwide. Interestingly, a few days after he was inaugurated, Secretary of State Marco Rubio also stated in an interview that the unipolar world in the aftermath of the Cold War was an anomaly and that the world is now in a multipolar era. He also added that because the United States was the only power in the world after the end of the Cold War, it assumed the responsibility of "becoming the global government in many cases, trying to solve every problem." Although he did not affirm it explicitly, this statement implies that the United States itself is ceding its claim to primacy and shifting its gaze to a multipolar world.

The multipolarity discourse is robust, but there are competing definitions of "multipolarity" and even "polarity." Moreover, there is no consensus on what a great power is, and although it seems like the international system is moving toward several different poles, it is premature to describe international relations today as definitively multipolar. China has become a major contender, but the United States is still far ahead in many measures of hard power, namely military and economic strength. Perceptions are important, however. It is undeniable that for the past ten years, Japan has braced for a reduced U.S. presence in the world. Before Trump, President Barack Obama hinted at reduced U.S. engagement when he stated in 2013 that "America is not the world's policeman." It is in this context that Japan unveiled the Free and Open Indo-Pacific (FOIP) vision in August 2016. After the concept was formally rolled out as the primary pillar of Japan's foreign policy, the Trump administration enthusiastically endorsed it in 2017. The U.S. military also renamed its Pacific Command to the Indo-Pacific Command in May 2018 to reflect this new alignment. The new FOIP framework has allowed the Japanese government to continue emphasizing the U.S.-Japan alliance while simultaneously branching out to find new partnerships in different areas of cooperation (such as counterterrorism, cybersecurity, quality infrastructure, maritime

security, humanitarian assistance/disaster relief, and education and human resource development).¹⁴ Tokyo's timing in promoting the FOIP vision, therefore, coincided with an increasingly insular Washington that is more wary of traditional alliances.

A Very Different Trump Administration

The 2024 U.S. presidential election saw significant trepidation among U.S. allies across the world. In Japan, for example, nearly nine in ten people said they were interested in the outcome of the election, according to a September 2024 NHK poll. **Moshitora* (What if Trump?) became a ubiquitous phrase in the Japanese news. **In Now that moshitora* has turned into mata-tora* (Again Trump), Tokyo should rethink the best way to approach the next four years.

Japanese Prime Minister Shigeru Ishiba is off to a relatively smooth start, according to Japanese analysts who assessed his first visit to the White House in February 2025.¹⁷ He was well-prepared and well-coached going into the bilateral summit, listing Japan's existing efforts to make the United States safer and more prosperous and appealing to Trump's relationship with Abe (despite Ishiba's intraparty rivalry with the deceased prime minister).¹⁸ Ishiba also noted Japanese investments that have generated jobs in the United States and pledged to increase these numbers.

Unlike during his first presidential campaign in 2016, where Trump singled out Japan several times, nothing inherently negative about Japan emerged in Trump's rhetoric during his campaign leading up to the 2024 election, which gave Japan some initial hope about the future of the U.S.-Japan alliance under a potential second Trump administration.¹⁹ However, one major difference from his first presidential term is that, having served as president once, Trump is now more politically experienced. His party also controls both chambers of Congress, and there is a 6-3 conservative majority in the Supreme Court. As a result, these institutions may make it easier to codify an America-First foreign policy that lasts even after Trump leaves the White House.

Another significant difference between the Abe-Trump and the Ishiba-Trump dynamic is that Prime Minister Ishiba is currently in a politically weak position at home, which will make it difficult for him to lean on Abe's legacy for much longer. Ishiba had become popular among voters for openly criticizing other politicians in his own party, including former prime ministers Abe and Fumio Kishida. After a very tight race, Ishiba was nominated as leader of the Liberal Democratic Party (LDP) in September 2024 and, a few days later, he called a snap election for the Diet's House of Representatives (lower house) with the goal of consolidating his mandate. However, the election did not go as planned, and the LDP lost its majority in the Diet. The LDP had been riddled with scandals for several years, and in the past two years, the party attempted to repair its reputation, with Kishida eventually stepping down amid fallout from the latest scandal.²⁰ A new corruption scandal, however, quickly tanked Ishiba's approval ratings ahead of the crucial House of Councillors (upper house) election in July 2025, meaning he is less able to pirouette on the international stage while his focus remains on domestic issues.²¹

An additional element that could impact alliance dynamics between the United States and Japan is the upcoming negotiations on the bilateral host nation support agreement. The agreement is set to expire in 2027, and negotiations are expected to be lengthy and difficult—not unlike the defense cost-sharing

deal between the United States and South Korea in Trump's first term.²² The new U.S. Ambassador to Japan George Glass already stated in March 2025 that Washington should press Tokyo to increase its financial contribution for hosting U.S. forces in the region.²³

An Erosion of Confidence in the United States

Also in March 2025, President Trump suggested that the U.S.-Japan security treaty was "unequal" and claimed that the United States has to protect Japan, while Japan is not obligated to protect the United States.²⁴ He further stated that this arrangement had allowed Japan to make a "fortune." This is a sentiment that Trump has repeated several times over the years, not just about Japan but other U.S. allies as well.²⁵ A Trumpian worldview is zero-sum: if other countries gain, the United States loses. The president has held this view for decades, and although he encountered some hurdles during his first term due to his lack of preparedness to serve as U.S. president, he will be more decisive in this second term and less constrained to implement his policies, as he has ensured that he is exclusively surrounded by loyalists.

In his nomination hearing for under secretary of defense for policy on March 4, 2025, Elbridge Colby described Japan as a "vital ally" that needs to spend far more on its defense. According to Colby, the Japanese government's pledge to increase its defense budget to 2 percent of GDP by the 2027 fiscal year is "manifestly inadequate" and made "little sense," as Japan is directly threatened by nuclear-armed countries such as China and North Korea. He added that Japan should spend "at least 3 percent of GDP on defense as soon as possible" and that the U.S. government will make this clear to Japan in a "constructive but pressing fashion." However, Japan's defense spending is already at historic levels—the 2 percent goal is ambitious, and it is unlikely that the country will be able to spend "at least 3 percent" anytime soon. In the meantime, Prime Minister Ishiba quickly rebutted Colby's remarks, stating that Japan "determines its own defense spending, not at the direction of any other country."

The approach that the Japanese government has taken so far is to emphasize what the country is already doing for the U.S.-Japan alliance and across the Indo-Pacific region. Significant progress is being made in areas that are not fiscally tied to any budget increases—for instance, the establishment of a service component of the United States Space Force at the Yokota Air Base in Japan and its potential cooperation with Japan's Space Operations Group.³⁰ Moreover, in line with the United States' request to step up its defense contribution, Japan is deepening its cooperation with NATO in the context of the Individually Tailored Partnership Program (ITPP), including support for Ukraine, cyber defense, disinformation, and technology.³¹ Japan will likely continue to draw attention to these developments to help assuage criticisms from the Trump administration that it is not pulling its weight.

However, it is not clear how effective this approach will be. Many in Japan watched the tense exchange between President Trump and Ukrainian President Volodymyr Zelenskyy in the Oval Office on February 28, 2025—with Trump briefly cutting off military aid to Ukraine after the meeting—as a horrific preview of how the United States may deride Japan or any other ally if it faced a security crisis and needed U.S. help.³² The public dressing down of Zelenskyy, combined with Trump's history of praising Putin, has major consequences for U.S. allies in Europe and the Indo-Pacific. European countries are now

scrambling to respond to the "existential threat" from Russia without the help of the United States, as Trump seems to have grown frustrated with the conflict and his inability to broker a peace deal after all.³³

Under Prime Minister Kishida, Japan was one of the most vocal critics of Russia's invasion of Ukraine and one of the biggest supporters of Ukraine.³⁴ "Ukraine today may be Asia tomorrow," Kishida warned countless times, and his assertion that "unilateral attempts to change the status quo by force are not acceptable" is a clear message toward China.³⁵ An unnamed cabinet member was quoted by *The Nikkei* as saying that the Trump administration's treatment of Ukraine is "unbearable when you think about Asia."³⁶ Nobukatsu Kanehara, former deputy national security adviser to Prime Minister Abe, commented, "What Japan has learned from the Ukraine war is that the era where we could rely entirely on the U.S. is over."³⁷

This divide between the positions of the Trump administration and the Japanese government on the war in Ukraine is undoubtedly creating a dilemma for Japan. How can Japan strengthen its relationship with the United States if the U.S. government is disinterested in preserving the international status quo? Although Japan is anxiously grappling with this dilemma, the Ishiba government has publicly refused to take sides between the United States and Ukraine.³⁸ Ishiba has instead emphasized that "the most important thing is for the Group of Seven to stay united."³⁹ After the Trump-Zelenskyy meeting, Yoshikazu Watanabe, an influential retired lieutenant general in Japan, suggested that the only action Japan can take is to "passively watch while Trump acts erratically."⁴⁰

Although confidence in the U.S.-Japan alliance can be measured in many ways, Trump's relentless deployment of disinformation and abrasive rhetoric toward allies—often mirroring Russian propaganda—severely undermines confidence in U.S. leadership. I Trump's longtime affinity with authoritarian regimes and unwillingness to criticize Putin is pushing U.S. allies in Europe and East Asia to lose confidence in the United States' resolve to help allies in a contingency. Newly elected German Chancellor Friedrich Merz questioned whether NATO would remain in its "current form" when "it is clear that this [U.S.] government does not care much about the fate of Europe. Jutch Foreign Minister Caspar Veldkamp echoed such sentiments, commenting that this "signals we are at the start of a new era. As a way to increase the rate of defense equipment production in Europe, French President Macron has called on European countries that are "buying American" to invest in European defense equipment instead.

Trump's sympathy toward Russia has also triggered renewed fears of nuclear proliferation in East Asia among U.S. analysts. Former South Korean Minister of Foreign Affairs Yoon Young-kwan wrote in March 2025 that "we should strengthen our national defense capabilities, including potential nuclear capabilities, and prepare to handle the deterrence of North Korea with our own strength." It is worth noting that the nuclear debate is not new in South Korea and remains far-fetched. Even if South Korea were to go nuclear, it does not automatically mean that Japan would follow suit. Japanese policymakers and bureaucrats will continue to discuss all available options for national defense in the event the United States fails to fulfill its security commitments, but nuclear armament would be an abrogation of Japanese policymakers' deep commitment to preserving the status quo and protecting the liberal international order.

Another potential challenge for the U.S.-Japan relationship is the Trump administration's policy toward North Korea. The president has repeatedly expressed interest in meeting Kim Jong Un again, and he and members of his cabinet have either described North Korea as a "nuclear power" or alluded to a policy objective less than the longstanding goal of complete, verifiable, and irreversible denuclearization (CVID).⁴⁸ Although the United States, Japan, and South Korea renewed their two-decades-old pledge to make CVID possible on the Korean Peninsula, Trump continues to refer to North Korea as a "nuclear power."⁴⁹ These mixed messages could become a problem in U.S.-Japan relations if the two allies' messaging, priorities, and approach vis-à-vis North Korean issues differ. When Trump moved ahead with an unexpected summit with Kim in the summer of 2019, some officials in Tokyo expressed surprise and a feeling of isolation.⁵⁰ If the United States fails to consult Japan ahead of any potential meeting or deal with North Korea in the future, this would drive a wedge in the alliance and further erode trust in the United States.

Maintaining the Status Quo Through a Network of Partnerships

To build resiliency and durability in Japan's ability to weather external uncertainties, its FOIP strategy outlines the country's goal of not only maintaining a strong alliance with the United States but also building a robust network of allies and partners in case the U.S.-Japan alliance weakens. Although Japan is committed to various multilateral and minilateral arrangements, the unpredictability of the current U.S. administration will test the stability and effectiveness of Japan's strategy.

There are several frameworks that include both the United States and Japan that are likely to flourish in the next few years. The Quad, for example, is an informal strategic partnership among the United States, Australia, India, and Japan and is a critical node of Japan's FOIP policy. It also seems to be at the forefront of the agenda for the second Trump administration's foreign policy. Secretary Rubio attended the Quad's foreign ministerial meeting in Washington, DC, only hours after he was appointed on January 21.⁵¹ The Quad has engaged in public health activities such as vaccine distribution during the COVID-19 pandemic and several technology-focused initiatives, including cooperation on 5G networks, technical standard development, and cybersecurity. The first Trump administration was similarly active and supportive of the Quad, which suggests that Rubio's participation is indicative of continued efforts over the next four years. Japan hopes that the framework can continue to grow into an important counterweight to China's regional influence—an approach that Trump will likely emphasize during his tenure as well. The key relationship to watch is the one between the United States and India, as Prime Minister Narendra Modi has fully embraced Trump's positions on many issues, including backing his proposal to end the war in Ukraine.⁵²

Trilateral security and economic cooperation among the United States, Japan, and the Philippines also has a good likelihood of continuing under Trump.⁵³ In April 2024, U.S. President Joe Biden met with Japanese Prime Minister Fumio Kishida and Philippine President Ferdinand Marcos Jr. in a first-ever trilateral summit. The meeting underscored the importance of military and economic security cooperation among the three partners and showcased the Philippines' eagerness to deepen its strategic alignment with the United States and Japan in response to Chinese coercion.⁵⁴ The Philippines' recent pro-U.S. lean following former President Rodrigo Duterte's departure in 2022 and its increasingly proactive

stance in deterring China's aggressive activities in the South China Sea may win President Trump's favor and approval for this trilateral to grow stronger in the future.⁵⁵

Meanwhile, it seems there is less momentum to continue or sustain fledgling trilateral cooperation among the United States, Japan, and South Korea. South Korea's Yoon Suk Yeol was impeached for attempting to seize power in a martial law decree last December. Yoon was already deeply unpopular, partly as a result of his outreach efforts to Japan.⁵⁶ On June 3, South Korean voters decisively elected Lee Jae Myung from the Democratic Party as the new president. Lee and his party have historically been more cynical toward Japan, which will inevitably have an impact on Japan-South Korea relations in the coming years.⁵⁷ Without bilateral maintenance between Seoul and Tokyo, sustaining trilateral progress could rely entirely on the Trump administration—a role it seems unlikely to have an interest in playing. Moreover, Trump's past tensions with former South Korean President Moon Jae-in over cost sharing and his potential unilateral overtures to Kim could further strain U.S.-South Korea relations.⁵⁸ A positive first step is the Lee-Ishiba meeting that took place on the sidelines of the G7 summit in Canada in June 2025. In the short thirty-minute meeting, the two leaders vowed to deepen their "inseparable" bilateral ties and acknowledged the importance of the trilateral partnership. This development shows that both Lee and Ishiba fully understand the significance of this trilateral. Regardless, however, operational cooperation through the U.S.-Japan-South Korea Freedom Edge exercise, which was launched in 2024, will likely ensure some level of engagement between the three countries, at least in the short term.⁵⁹

On the European front, Japan has recently revamped its relationship with the European Union. For many decades, Japan has been the European Union's closest strategic partner in the Indo-Pacific, and the partnership is based on common interests and shared values, such as support of human rights and democracy, multilateralism, and the rules-based international order. The timing of the adoption of the EU-Japan Economic Partnership Agreement (EPA) and the Strategic Partnership Agreement (SPA) in December 2018 is significant, as the multilateral system was being challenged by China and Russia, as well as a U.S. administration whose direction was guided by an inward-looking America-First policy. The EU-Japan SPA went fully into force in early 2025, the first-ever bilateral political framework agreement between the two partners designed to strengthen their shared commitment to a rules-based global order. The SPA presents a solid framework for cooperation across several domains, including global security cooperation, anti-terror initiatives, and nonproliferation. Japan also reinvigorated its engagement with NATO in the aftermath of Russia's invasion of Ukraine, and the Japanese prime minister participated in the NATO summit for the first time in 2022. As part of the Indo-Pacific Four (IP4) countries that partner with NATO, Japan is expected to cooperate further with NATO in the coming years on a number of important priority areas, such as cyber defense, countering disinformation, and technology.

Additionally, Japan is becoming more proactive in Central and Eastern Europe. In April 2024, Japan joined the Three Seas Initiative (3SI) as a new strategic partner alongside the United States and the European Union.⁶³ The 3SI was established in 2015 to strengthen connectivity and reduce the disparities in Central and Eastern Europe (CEE) and the Baltic states. The initiative is centered on the promotion of developing infrastructure in the region's energy, transport, and digital sectors. The war in Ukraine has highlighted the relevance of this initiative, and it has become increasingly clear that the stability of the Euro-Atlantic region is inseparable from the stability of the Indo-Pacific. As CEE countries realize

the limited economic benefits from continued engagement with China, Japan can capitalize on this skepticism with its own long-term economic deals.⁶⁴

U.S.-Japan Trade Developments

Trump's policy priorities in the first few months of his presidency seem mostly devoted to trade, specifically raising tariffs and entry barriers for U.S. allies and adversaries alike. Japan has accelerated investments in the United States, promising to raise the total value from USD 800 billion to USD 1 trillion. However, as described above, Ishiba is in a weak position domestically and will likely struggle to effectively balance both security and economic ties with the United States. Due to the state of its economy and the importance of trade with the United States, Japan is not in a position to retaliate with its own tariffs, so it has few other options than to muddle through tariff negotiations with the Trump administration and seek exemptions. Although Japan was able to secure some insulation against tariffs during the first Trump administration, it is struggling to do so this time around. Minister of Economy, Trade and Industry Yoji Muto failed to receive assurances from U.S. officials that Japan would be exempt from tariffs in March 2025. Trump's so-called "Liberation Day" tariff announcement pegged Japan with a 24 percent rate starting in July, while Japanese steel and aluminum are expected to suffer from a 25 percent tariff penalty. After five rounds of negotiations with the United States, Japan's Economic Revitalization Minister Ryosei Akazawa finally alluded to "some progress" in early June, yet declined to elaborate further.

Although global markets had viewed Trump's intention to impose tariffs as merely a threat, it quickly became clear that Trump believes a harsh tariff policy is the right solution to put pressure on other countries, which he is convinced will bring manufacturing back to the United States and create more jobs at home. Trump's tariff announcements in April wrecked the stock market and imperiled the bond market, and his willingness to start a trade war with the entire world has pushed Japan to deepen economic ties with other countries. In order to prepare for Trump's tariff policy, the Japanese and UK foreign and trade ministers met in Tokyo in March for their first-ever two-plus-two economic dialogue and agreed to work together to address energy and security challenges and stand up for "fair, rules-based international trade." In late March, Trade Minister Muto also met with his Chinese and South Korean counterparts at their first economic dialogue in five years, seeking to facilitate and fortify regional trade links to insulate Japan from the U.S. market.

Despite concerns over the economy and financial markets both in the United States and abroad, Trump moved forward with his announcement, which the Japanese government called "extremely regrettable." However, after one of the worst market crashes since 1929 and a lot of international backlash, Trump paused the tariffs for ninety days, taking a step back from his initial announcement. This dramatic economic instability by the United States brings serious concerns regarding the reliability of U.S. security commitments, which have the potential to weaken the United States' relationships with allies and partners in the Indo-Pacific.

Japan's Dilemma Moving Forward

Trump's return to the White House has brought new fears and anxiety in Tokyo. In less than six months since his inauguration, Trump signed over 160 executive orders, openly ridiculed and belittled a friendly nation in need, and announced worldwide tariffs that caused stock markets to nosedive and set the stage for a possible recession.⁷⁵ Trump's cabinet appears far less willing to constrain his worst impulses.⁷⁶ The gap between the United States and Japan is steadily widening as only the latter articulates a deep commitment to a free and open international order based on the rule of law.

Although the Biden administration did not always act rapidly and strongly enough in support of Ukraine, its rhetoric was typically aligned with other democracies, such as Japan, in denouncing imperialism and wars of conquest.⁷⁷ In one meeting with Zelenskyy, Trump completely overturned the U.S. position and sowed what could be permanent doubt among allies across Europe and the Indo-Pacific about whether the United States would come to their aid in a crisis. Despite its apparent reluctance to accept a potential shift toward a multipolar world, Japan's recent efforts to build a strong network of partners apart from the United States may ultimately push the country to develop into a regional pole, at least in certain domains.

Since the first Trump administration, Japan has steadily diversified its partnerships and proactively deepened ties with other countries in the Indo-Pacific and Europe while simultaneously strengthening the U.S.-Japan alliance. Now, however, Japan finds itself in a dilemma between maintaining a strong relationship with the United States, which is essential for its national security, and continuing to pursue its strategic goal of preserving the liberal international order—a goal currently not shared by the United States. A nightmare scenario for Japan would involve having to choose between the United States and the liberal international order. This fundamental difference in worldview between the two allies will inevitably become a growing challenge that drives a wedge between Washington and Tokyo over the next four years and, possibly, beyond the current U.S. administration. For the time being, all Japan can do is to continue its dual approach of strengthening its alliance with the United States while proactively deepening its partnerships in Europe and elsewhere, thus serving as a bridge between the Euro-Atlantic and the Indo-Pacific theaters.

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