



# **Local Opportunities and Global Disputes: Tracking Japan's Engagement with Africa amid Geopolitical Tensions**

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# Executive summary

Japan's relationship with Africa is changing rapidly. While Tokyo has maintained its traditional aid-focused approach to the continent, it is also encouraging more engagement from the Japanese private sector and a stronger focus on critical minerals. These shifts come amid growing tensions between the G7 advanced economies and the People's Republic of China. This policy insight shows that concern about Chinese influence in critical mineral supply lines, and its wider involvement in key African sectors like green energy, industrialisation and infrastructure, is leading Japan to expand its African engagement. However, elevated risk perception among Japanese companies could prove to be a complicating factor.

## Introduction

In October 2023, the Tokyo International Conference on African Development (TICAD) celebrated its 30<sup>th</sup> anniversary. In many ways, the original summit established a template for the so-called 'Africa + 1' summits between the continent and external partners. Arguably the most important of these is with China. Officially known as the Forum on China–Africa Cooperation (FOCAC), this triennial summit has become the pre-eminent forum for the management of Africa's relationship with China.

The ninth FOCAC gathering will take place in Beijing in September 2024. TICAD 9 will follow in 2025, in Yokohama.<sup>1</sup> The two summits will bring the continent face to face with two of its most important development partners at a moment when both China and Japan are interested in revivifying their respective relationships with the continent. Moreover, the events will take place in a climate of increased geopolitical competition, where China's and Japan's individual relationships with Africa should be seen in the context of large geopoliticised groupings – the G7 group of industrialised (and mostly Western) powers in the case of Japan, and the BRICS<sup>2</sup> group of emerging powers, of which China is a key member.

Global political contestation between established and emerging powers increasingly drives their respective engagements with Africa, even (or maybe especially) in ostensibly non-political fields like the minerals trade. This policy insight uses the upcoming FOCAC and TICAD gatherings as an occasion to track Japan's engagement with Africa in the context of growing strategic competition between the G7 and China. It first maps the historical evolution of Japan's engagement with Africa in the context of China's growing presence. It then traces current shifts in Japan's focus on the continent in three fields: rare earth and critical minerals, green energy and geopolitics.

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1 Fabio Scala, "[Japan's Next TICAD to be Hosted in Yokohama](#)", Further Africa, August 10, 2023. .

2 BRICS stands for Brazil, Russia, India, China and South Africa, although the group admitted some additional members in 2024.

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## Japan–Africa engagement in context

Japan's relationship with Africa emphasises constancy, and the innovations of the last few years should be seen in the context of ongoing, largely stable cooperation. This cooperation in many ways echoes that of European powers and the US, albeit with key differences.

### Japan's engagement with Africa has long been dominated by ODA

Japan's engagement with Africa has long been dominated by official development assistance (ODA). This engagement evolved into Africa's proportion of Japanese aid slowly increasing relative to flows to Asia, from 1.8% of Japan's total ODA in 1970 to 10.9% in 1990.<sup>3</sup> In 1989, Japan surpassed the US as the world's largest aid donor, a position it held until domestic economic challenges forced the reduction of ODA budgets from 1998.<sup>4</sup> Japan lost its top spot in 2001,<sup>5</sup> and is currently the world's fourth-largest donor.<sup>6</sup> This cooperation forms a larger proportion of Japanese financing flows to Africa than China's and echoes the engagement from Japan's G7 counterparts in focusing on soft infrastructure (particularly education and health). In addition, Japanese agencies have been involved in water and sanitation provision.<sup>7</sup>

This engagement has built a certain level of constancy into the Japan–Africa relationship. The continent generally absorbs about a 10<sup>th</sup> of Japan's total ODA budget,<sup>8</sup> and Japanese

3 Keiichi Shirato, *Japan's Strategic Interests in the Global South: Africa*, Report (Washington DC: Center for Strategic and International Studies, May 21, 2024).

4 Japanese Ministry of Foreign Affairs, "Japan's Official Development Assistance White Paper 2014" (Ministry of Foreign Affairs of Japan, Tokyo, December 22, 2015).

5 Japanese Ministry of Foreign Affairs, "Japan's Official Development Assistance".

6 OECD, "2024 Trends and Insights on Development Co-operation: Japan", [https://www.oecd-ilibrary.org/sites/b8cf3944-en/index.html?itemId=/content/component/5e331623-en&\\_csp\\_=b14d4f60505d057b456dd1730d8fcea3&itemIGO=oecd&itemContentType=chapter](https://www.oecd-ilibrary.org/sites/b8cf3944-en/index.html?itemId=/content/component/5e331623-en&_csp_=b14d4f60505d057b456dd1730d8fcea3&itemIGO=oecd&itemContentType=chapter).

7 Stellenbosch University, Japan Centre, "Japan Up Close Magazine Interview with Prof. Scarlett Cornelissen", June 29, 2023.

8 Keiichi, *Japan's Strategic Interests*.

implementers of ODA initiatives (for example, the Japan International Cooperation Agency [JICA]) have maintained a long-term presence on the continent. The agency has 31 offices in various African countries.<sup>9</sup> Its activities include traditional aid targets like vocational training and crop improvement, as well as overarching development initiatives such as the conceptualisation of regional logistics corridors and master plans for urban redevelopment projects.<sup>10</sup> JICA's presence mirrors the work of Western development agencies and it maintains a close working relationship with Western counterparts in Africa, such as the US Agency for International Development (USAID).<sup>11</sup>

However, certain aspects of Japan's ODA implementation are unique. For example, some of its target areas (including health) have been boosted by the deployment of subject matter experts to Africa to cooperate with local experts. In addition, the Japanese government funds centres dedicated to *kaizen* (the Japanese philosophy of gradual and continual improvement of industrial processes – a key innovation that propelled the global prominence of firms like Toyota) and *monozukuri*-focused workshops (manufacturing with a specific focus on the overlap between artisanal and industrial processes, aimed at raising the quality of final products – a key contributor to the global success of Japanese sectors like textiles and ceramics).<sup>12</sup>

## Certain aspects of Japanese engagement also echo those of China

Certain aspects of Japanese engagement also echo those of China. For example, unlike Western powers, Japan has been involved consistently in African infrastructure provision. Similar to the case with China, this has been driven in part by a strong domestic construction sector. Japanese conglomerates have historically played a major role in African infrastructure development. Japan has also set out to differentiate itself from China through the use of messaging (such as at forums like the G20) that emphasises 'quality infrastructure'<sup>13</sup> and Japan's training and human resource development in an infrastructure context. In Africa, such projects include the Matadi Bridge in the Democratic Republic of Congo (DRC); sections of the Tema Motorway in Ghana, which

9 Japan International Cooperation Agency, "JICA in Africa at a Glance", <https://www.jica.go.jp/english/TICAD/overview/cooperation/>.

10 JICA, "JICA's Development Cooperation in Africa in TICAD's 30-year History", Japanese Ministry of Foreign Affairs, August 26, 2023; Sylvia Croese and Yohei Miyauchi, "The Transcalar Politics of Urban Master Planning: The Japan International Cooperation Agency (JICA) in Africa", *Area Development and Policy* 8, no. 3 (2023).

11 USAID, "Administrator Samantha Power Meets with President of Japan's International Cooperation Agency Tanaka Akihito", Press Release, September 22, 2023.

12 Stellenbosch University, Japan Centre, "Japan Up Close Magazine Interview".

13 Cobus van Staden, "Japan and China's Summit Competition in Africa" (Policy Insight 78, South African Institute of International Affairs, Johannesburg, January 3, 2020).

forms part of the country's regional corridor development; and improvements to Kenya's Mombasa Port.<sup>14</sup>

Regarding its long engagement in infrastructure, TICAD 7 (2019) and TICAD 8 (2022) have seen greater emphasis being placed on catalysing increased private sector financing for infrastructure development. This comes amid recognition of the ongoing infrastructure gap on the continent and many countries' limited capacity for additional sovereign debt. While the continent's debt-to-GDP ratio stood at a relatively sustainable 68.6% in 2023, 10 African countries have elevated external debt levels (making up 67% of Africa's total external debt), augmenting the risk of debt distress.<sup>15</sup> As a result, greater emphasis is being placed on blended finance and public-private partnerships in infrastructure provision.<sup>16</sup> These approaches use investment from private sector actors to diversify stakeholdership and to reduce the risk of recipient governments taking on too much debt.

Another area of overlap is close engagement in agricultural capacitation via agricultural demonstration centres. These are aimed at elevating African agriculture and developing context-appropriate solutions through cooperation between government agencies, research institutions and the private sector. Both Japan and China run these centres in various African countries as part of ODA engagement.

## Japan's emerging priorities in the context of strategic competition

While Japan-Africa relations are characterised by constancy,<sup>17</sup> Japan is also promoting new forms of cooperation that arguably reflect G7 responses to China's transformative role on the continent. While the first decade of the Belt and Road Initiative (BRI), a global

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14 Japanese Ministry of Land, Infrastructure, Transport and Tourism, *Japan's "Quality Infrastructure" around the World: Compendium of Good Practices*, Report (Tokyo: Ministry of Land, Infrastructure, Transport and Tourism, March 2021).

15 Afreximbank Research, *State of Play of Debt Burden in Africa 2024: Debt Dynamics and Mounting Vulnerability*, Report (Cairo: Afreximbank, 2024).

16 This is also true for China. See, for example, Cobus van Staden, "New Trends in Chinese Infrastructure Lending to Africa" (Policy Briefing 274, SALLA, Johannesburg, July 26, 2023).

17 While this policy insight mostly focuses on developmental cooperation, Japan also contributes (albeit mostly financially) to peacekeeping on the continent. See Japanese Ministry of Foreign Affairs, "Japan's Contribution to UN Peacekeeping Operations (PKO)", February 27, 2024.

infrastructure and connectivity initiative spearheaded by the Chinese government, saw the rollout of numerous large-scale infrastructure projects, it also revealed the limitations of depending on large sovereign loans to support them. The resulting debt impact, both in Africa and in China, led to a sharp decline in financing, which overlapped with in China's zero-COVID period.

At the third Belt and Road Forum in October 2023, Chinese President Xi Jinping signalled that the BRI's second decade would reflect a 'small-is-beautiful' approach, with a strong focus on renewable energy provision. The shift reflected a reduction in project sizes as well as a decline in certain forms of regional engagement during China's zero-COVID era. However, funding increased in 2023, with total BRI financial engagement passing the \$1 trillion mark.<sup>18</sup> This approach dovetails with state support for renewable energy, electric vehicles and battery technology at home. These industries were supported by far-sighted early investments by Chinese mining companies in Global South critical mineral sectors, including in Africa. The result was that China had an advantage at several stages of the green technology and battery value chain – from mineral extraction and refining to battery component manufacture, photovoltaic components and smart grids.

## As China faces growing trade barriers in Global North markets, it is focusing more conclusively on the Global South

As China faces growing trade barriers in Global North markets, it is focusing more conclusively on the Global South, accelerating and amplifying its trade diversification efforts. In 2023, developing countries' share of Chinese exports grew to more than 50% (from 42% in 2017).<sup>19</sup> This in turn has triggered shifts in approach by G7 countries, notably Japan.

The remainder of the policy insight focuses on three key areas reflecting strategic shifts in Japan's engagement, arguably shaped by G7 responses to Chinese engagement on the continent.

## Infrastructure and renewable energy

The \$30-billion funding package announced at TICAD 8 targeted conventional ODA areas like food assistance (\$130 million), food production (\$300 million) and vaccine access

<sup>18</sup> Christoph Nedopil, *China Belt and Road Initiative (BRI) Investment Report 2023* (Brisbane and Shanghai: Griffith Asia Institute, Griffith University and Green Finance & Development Center, FISF Fudan University, 2024).

<sup>19</sup> Jeongmin Seong, "The Global Economy Is Resetting, China Is Repositioning Itself to Export Innovative Technologies, and Its Trading Partners Are More Diverse", *Hong Kong Economic Times*, April 22, 2024.

(\$1.5 billion), while also setting ambitious targets for debt management capacity building in 30 countries and improvements to regional logistics networks.<sup>20</sup> In addition, \$4 billion was allocated to Japan's Green Growth Initiative for Africa.<sup>21</sup> This funding is explicitly positioned as part of Japan's 'quality infrastructure' theme, which Japan promoted at earlier TICAD gatherings as well as during its presidency of the G20. This theme implies a contrast between Japanese and Chinese infrastructure provision in Africa.

The Green Growth Initiative includes supporting feasibility studies and investment in the green energy sector, especially in geothermal power generation, sustainably produced hydrogen fuel for heavy industry and battery storage.<sup>22</sup> In addition, the African Development Bank signed a cooperation agreement with the Japanese government to provide a total of \$5 billion for a range of development projects with a focus on electricity, connectivity, health and agriculture.<sup>23</sup>

While this engagement focuses on securing opportunities for Japanese companies that overlap with African countries' green transition goals, it also creates a space for collaboration with Japan's G7 partners. For example, the conversation that took place between Japanese and South African officials about shared green hydrogen projects related to expanded cooperation between the Japan Organization for Metals and Energy Security (JOGMEC) and Germany's H2Global Foundation on green hydrogen production in Africa, with the aim of exporting to Europe.<sup>24</sup> The Green Growth Initiative also emphasises collaboration via the Japan–EU Green Alliance, the OECD, and multilateral development banks.<sup>25</sup>

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20 Japanese Ministry of Foreign Affairs, "TICAD8: Japan's Contributions for Africa – Peace and Stability", <https://www.mofa.go.jp/files/100387226.pdf>.

21 TICAD, "Japan PM Announces \$30 Billion in Funding for Africa over Next Three Years", August 27, 2022.

22 Japanese Ministry of Foreign Affairs, "TICAD8: Japan's Contributions".

23 African Development Bank, "Japan and African Development Bank Announce up to \$5 Billion in Support for Africa's Private Sector", August 28, 2022.

24 Sergio Matalucci, "The Hydrogen Stream: Japan expands ties with Germany, South Africa", *PV Magazine*, February 13, 2024, <https://www.pv-magazine.com/2024/02/13/the-hydrogen-stream-japan-expands-ties-with-germany-south-africa/>.

25 Japanese Ministry of Foreign Affairs, "Japan's Green Growth Initiative with Africa", <https://www.mofa.go.jp/files/100386140.pdf>.

26 Emi Yasukawa, "Green Investment Takes the Lead: Japan's Revamped Approach in Africa", Atlantic Council, March 31, 2023.

being made to address the gap between Tokyo's political relationship with Africa and the declining commercial engagement from Japanese companies, reflected in a decade of shrinking foreign direct investment<sup>27</sup> and lacklustre trade performance. For example, Africa's share of Japanese trade was only about 1.4% in 2022.<sup>28</sup>

The dovetailing of these engagements with broader ODA priorities allows Japanese companies to claim credit for environmental and social investment in Africa, while also facilitating new opportunities for corporations that already have an operational presence on the continent. For example, the chemicals giant, Sumitomo, concluded a deal with the Namibian power utility, NamPower, to produce sustainable ammonia for export.<sup>29</sup> In addition to building bilateral government-to-government relationships and driving commercial opportunities, this strengthens Japan's cooperation with key G7 allies as well as symbolically re-positions Tokyo as a key infrastructure partner to Africa, in opposition to China.

This approach seems to be guiding more financing choices recently. For example, in May 2024, it was announced that Japan would offer \$107 million in bilateral loans to Kenya.<sup>30</sup> In line with the green energy infrastructure focus, collaboration in geothermal energy projects features prominently. In addition, the loans re-position Japanese entities in infrastructure sectors that have largely come to be occupied by China as part of the BRI, including port upgrades and special economic zones. Moreover, the loan package boosts Japan's prominence as an external partner to Kenya, exceeding current bilateral lending from France and Germany.<sup>31</sup>

The financing also signals ongoing unhappiness in Kenya about the opaque and troubled Chinese infrastructure loans, which have exacerbated national concerns about debt sustainability.<sup>32</sup> While Chinese loans are only a part of a wider debt problem, the perceptions of irregularity surrounding the initial loans for the Standard Gauge Railway, and the subsequent refusal of additional loans to expand the rail network to enable full commercial viability, affected China's image.<sup>33</sup> Japan's offer implicitly creates a contrasting option, while promoting the theme of 'quality infrastructure'.

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27 Japan External Trade Organization, '[日本とアフリカのビジネスの現状](#)' [*The Current State of Japan-Africa Business*] (Tokyo: JETRO, August 27, 2021), 19.

28 Aggregated from: Santander Trade, "Japanese Foreign Trade in Figures", [https://santandertrade.com/en/portal/analyse-markets/japan/foreign-trade-in-figures#classification\\_by\\_country](https://santandertrade.com/en/portal/analyse-markets/japan/foreign-trade-in-figures#classification_by_country); Urs Schöttli, "[Japan's Valuable Footprint in Africa](#)", GIS, August 16 2023.

29 Yasukawa, "Green investment Takes".

30 Herald Aloo, "[Kenya: Japan's \\$107m Loan Deals Outdo China as Dominant Lender](#)", *The Africa Report*, May 13, 2024.

31 Aloo, "Kenya: Japan's \$107m Loan".

32 Business Daily, "[Debt Expenses Surpass Kenya's Ordinary Revenue Flows](#)", *The East African*, August 23, 2023.

33 Emmanuel Ingunza, "[Kenya Seeks More Chinese Loans at 'Belt and Road' Forum Despite Rising Public Debt](#)", *Associated Press*, October 16, 2023. It is unclear why China refused additional loans, but contributing factors could include concern about Kenyan commitments to repay large market-rated Eurobond loans amid unpopular austerity measures occasioned by IMF assessments that Kenya is in danger of debt distress. See Fergus Kell, "[Kenya's Debt Struggles Go Far Deeper than Chinese Loans](#)", Chatham House, May 31, 2023.



# Rare earth and critical minerals

One of the strongest emerging areas of engagement between Japan and Africa is critical minerals. The context for this interest is twofold: first, many emerging technologies, including electric vehicles, next-generation computing and wind turbines, depend on critical minerals (including cobalt, lithium, bauxite and copper). In addition, many also depend on rare earth minerals, like cerium and erbium. Rare earth minerals are a subset of critical minerals known for their scarcity and specific utility in advanced technologies, including lasers, satellites and weapons systems. Securing supplies of these elements is crucial for many advanced economies, but especially for Japan because of the size and importance of its technology sector.

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Second, Japan's increased interest in these minerals is geopolitically inflected. The bulk of the world's rare earth mineral reserves are in China. China currently produces about 60% of the world's rare earths, but 90% of processing takes place in Chinese territory.<sup>34</sup>

Political tensions between China and the G7 developed countries have increased anxieties that authorities in Beijing could curtail supplies in the face of political disputes. Trade has long been a tool that Beijing uses to signal its displeasure. In 2010, it was widely reported that China had restricted rare earth exports to Japan in response to a fishing dispute. While there are doubts about whether exports were actually cut,<sup>35</sup> the widespread reporting around it arguably attracted more attention to rare earth minerals as a possible source of geopolitical dispute. More broadly, China's use of trade curbs as a political tool, the growing prevalence of tit-for-tat trade barriers in broader geopolitical disputes and its structural advantage as a major critical and rare earth mineral refiner raised concerns about supply chain security.

Consequently, both the technological value and the political valence of critical and rare earth minerals have only increased, especially against the backdrop of global trade becoming increasingly subject to geopolitical barriers. In response to US-led curbs on Chinese semiconductor development, the Chinese authorities started to limit exports of the rare earth minerals gallium and germanium, both used in the production of high-

<sup>34</sup> Gracelin Baskaran, "What China's Ban on Rare Earths Processing Technology Exports Means", CSIS, January 8, 2024.

<sup>35</sup> Simon Evenett and Johannes Fritz, "Revisiting the China-Japan Rare Earths Dispute of 2010", Centre for Economic and Policy Research, July 19, 2023.

functioning chips.<sup>36</sup> In December 2023, the Chinese government announced that it was halting the export of machinery used to extract and separate rare earth minerals, triggering more concern about supply chains.<sup>37</sup>

In response, Japan is participating in G7 efforts to source these minerals in Africa. This includes driving greater engagement between African countries and JOGMEC, a body facilitating links between government ministries and Japan's oil, gas and minerals sector. One of JOGMEC's core functions is to boost mineral exploration in resource-rich countries with an eye on opportunities for Japanese companies.<sup>38</sup> With 13 international offices and a remit ranging from building strategic mineral stockpiles to boosting undersea exploration and expanding renewable energy,<sup>39</sup> the body plays a prominent role in wider national strategies pertaining to energy and minerals security.<sup>40</sup> In 2008, JOGMEC established a remote sensing centre in Botswana to aid mineral surveying, including for rare earths.<sup>41</sup> In 2024, it was announced that Japan would join G7 partners in a project in the DRC aimed at extracting germanium under the US-led Minerals Security Partnership.<sup>42</sup>

## Geopolitical attention is also being directed at critical minerals

Geopolitical attention is also being directed at critical minerals. Through the 2010s, Chinese companies gained an early-mover advantage in key supplier countries. This included heavy investments in Zambian copper, cobalt and copper in the DRC, and lithium in Zimbabwe. About 73% of the world's cobalt extraction takes place in the DRC, and Chinese entities now control 15 of the 19 major cobalt mines in the country.<sup>43</sup> In addition to extraction, about 80% of the world's cobalt refining occurs in China. This gives China significant control over global supplies.

Chinese companies were also quick to respond to governments' demand for offshore mineral processing. Indonesia set a global precedent by banning the export of raw nickel (another key critical mineral) and Chinese companies responded by building local refining facilities (and frequently the electricity installations to power them).

36 Annabelle Liang and Nick Marsh, "Gallium and Germanium: What China's New Move in Microchip War Means for World", *BBC*, August 2, 2023.

37 Siyi Liu and Dominique Patton, "China Bans Rare Earths Processing Tech over National Security", *Reuters*, December 22, 2023.

38 Anna Nishino, "Japan Builds Supply Chain for EV Battery Minerals in Africa", *Nikkei Asia*, August 2, 2023.

39 Japan Organization for Metals and Energy Security, "About Us", <https://www.jogmec.go.jp/english/about/about006.html>.

40 JOGMEC, "Business Tool List", <https://www.jogmec.go.jp/content/300196027.pdf>; Ben Cahill, Jane Nakano and Kunro Irié, "How Japan Thinks about Energy Security", *CSIS*, May 22, 2024.

41 JOGMEC, "The Second Stage of the Projects in JOGMEC Geological Remote Sensing Centre in Botswana Will be Implemented", May 16, 2013; Thato Moseki, "Botswana: Japan Eyes Country's Mining Sector", *AllAfrica.com*, May 4, 2009.

42 Lenin Ndebele, "The US, EU, Japan Look to DRC in Microchip War with China", *News24*, May 9, 2024.

43 Table China, "China Dominates Global Cobalt Production", May 17, 2023.

Zimbabwe, which holds the sixth-largest reserve of lithium in the world,<sup>44</sup> followed Indonesia's example, producing similar results. At present, at least three Chinese companies (Zhejiang Huayou Cobalt, Sinomine Resource Group and Chengxin Lithium Group) have constructed refining facilities in Zimbabwe.<sup>45</sup>

## The rapid consolidation of different Chinese entities' control over key critical mineral sectors in Africa has raised concerns in the US and its allies

The rapid consolidation of different Chinese entities' control over key critical mineral sectors in Africa has raised concerns in the US and its allies. This has led to the fostering of more US-centred coalitions to counter Chinese dominance in this sector. Africa holds large reserves of critical minerals, like bauxite, copper, manganese, platinum, cobalt and lithium, positioning the continent as a key stakeholder in the race for supply chain control.

Japan is a member of the Minerals Security Alliance (MSA),<sup>46</sup> a US-centric body made up of 14 states and the EU, which focuses on securing clean energy value chains that comport with environmental, social and governance standards. While opposing China is not openly discussed in the official language surrounding the MSA, unnamed State Department officials confirmed to Bloomberg that the initiative is aimed at offering resource-rich countries an alternative to working with China.<sup>47</sup> In a similar vein, the leaders' communiqué at the May 2023 G7 meeting in Hiroshima stated: 'We are determined to increase our efforts and, in particular, will pursue secure, resilient, affordable, and sustainable clean energy supply chains, including those for critical minerals and clean energy technologies.'<sup>48</sup>

In addition to these multilateral initiatives, the G7 gathering saw the announcement of the joint UK–Japan Hiroshima Accord, which in part called for the formalisation of their cooperation in critical mineral supply chains.<sup>49</sup> This, in turn, led to Japan entering into a cooperation agreement with the UK in May 2023 to jointly invest in African critical minerals initiatives.<sup>50</sup> The agreement includes the joint development of mining and refining facilities in regions like Africa, with a focus on minerals such as nickel and cobalt.<sup>51</sup>

44 Clinton Pavlovic, "Zimbabwe: A New Focus for Lithium Mining", *Mining Weekly*, April 18, 2023.

45 Jevans Nyabiage, "China Strengthens Its Grip on Global Lithium Trade Amid Processing Plant Building Boom in Zimbabwe", *South China Morning Post*, March 10, 2024.

46 US Department of State, "Minerals Security Partnership", <https://www.state.gov/minerals-security-partnership/#:~:text=The%20MSP%20is%20a%20collaboration,powering%20the%20clean%20energy%20transition>.

47 Alberto Nardelli and Iain Marlow, "EU, US to Align Global Minerals Push Against China's Supply Grip", *Bloomberg*, February 9, 2024.

48 White House, "G7 Hiroshima Leaders' Communiqué", May 20, 2023.

49 UK Government, "Hiroshima Accord: An Enhanced UK-Japan Global Strategic Partnership", May 18, 2023.

50 UK Department for Energy Security and Net Zero, "Joint Statement between Ministry of Economy, Trade and Industry of Japan and Department for Energy Security and Net Zero of the United Kingdom on Renewable Energy Partnership", May 18, 2023.

51 Anna Nishino, "Japan and UK to Jointly Invest in Critical Minerals in Africa", *Nikkei Asia*, September 4, 2023.

Beyond these multilateral efforts, Japan has pursued bilateral engagements with African countries around securing critical and rare earth mineral supply chains. In August 2023, Japan's Minister of Economy, Trade and Industry, Nishimura Yasutoshi,<sup>52</sup> led a tour to Namibia, Angola, the DRC, Zambia and Madagascar.<sup>53</sup> His entourage included members of JOGMEC. The visit revealed the scope of Japan's involvement in the African critical minerals sector. In addition to years of surveying in Botswana, this includes rare earth mineral surveying in Namibia, as well as collaboration with Canadian entities in rare earth mineral exploration in the country. The two sides also discussed setting up a cross-border concentration and separation plant in Namibia.<sup>54</sup>

The Japanese Ministry of Economy, Trade and Industry also signed agreements with JOGMEC to conduct joint exploration projects with Zambia and the DRC, as well as undertake a Zambia-focused investment roundtable uniting the Zambian government and companies with 11 Japanese companies and JICA.<sup>55</sup>

In addition to renewing its bilateral political engagement with Africa and opening up opportunities for Japanese companies, Japan's focus on critical minerals is augmenting the country's prominence in the US-centric alliance, amid growing tensions with China. Japan has long been a recipient of US security operation in the Asia-Pacific region. However, becoming a more proactive actor has partly been constrained by Japan's post-World War 2 constitution, which places strong limits on involvement in military operations. In addition, popular opinion among Japanese voters has long reflected opposition to armed cooperation.

Japan has been slowly normalising its military. In late 2023, its cabinet approved a 16% increase in military spending and relaxed bans on the export of lethal weaponry that dated back to the end of World War 2.<sup>56</sup> This was driven by a revised national security strategy<sup>57</sup> adopted in 2022 that sets accelerated time frames for military expansion in the context of Russia's invasion of Ukraine and ongoing tensions with North Korea.<sup>58</sup> It included a more prominent role in US-centric regional security architectures.<sup>59</sup> Japan was a formative member of the Quadrilateral Security Dialogue (known as 'the Quad'), together with the US, Australia and India.<sup>60</sup> It also embarked on joint military operations with allies, including the US, the Philippines and Australia, in the South China Sea, a direct

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52 This policy insight follows Japanese convention in writing names with the surname first.

53 JOGMEC, "[JOGMEC Signed an Agreement with African Countries to Secure Critical Minerals – Strengthening Relationships with African Countries through Accompanying Minister Nishimura on a Visit to Southern African Countries](#)", August 18, 2023.

54 JOGMEC, "JOGMEC Signed an Agreement".

55 JOGMEC, "JOGMEC Signed an Agreement".

56 Mari Yamaguchi, "[Japan Cabinet OKs Record Military Budget to Speed Up Strike Capability, Eases Lethal Arms Export Ban](#)", *Associated Press*, December 23, 2023.

57 Japanese Office of Policy Planning and Coordination on Territory and Sovereignty, "[National Security Strategy of Japan](#)", December 2022.

58 Mari Yamaguchi, "[Japan PM Vows to Strengthen Military At Int'l Naval Review](#)", *Associated Press*, November 6, 2022.

59 Hideshi Tokuchi, "[Japan's New National Security Strategy and Contribution to a Networked Regional Security Architecture](#)", CSIS, June 23, 2023.

60 Associated Press, "[What Is the Quad and How Did It Come About?](#)", *The Guardian*, May 24, 2022.

challenge to Chinese positions there, while also becoming more prominent in its defence of Taiwan.<sup>61</sup>

While these military collaborations tend to be focused on Japan's immediate neighbourhood and not in Africa, they arguably reflect a greater willingness to cooperate with G7 allies in the Global South as part of a joint effort to counter Chinese influence. Japan's participation in the critical minerals initiatives mentioned above can be said to fulfil the dual function of, on the one hand, strengthening geopolitical alliances and securing supply chains for Japanese industry and, on the other hand, encouraging collaboration with G7 companies under various hydrogen and other green energy projects.

These forms of engagement are not explicitly military or geopolitical in nature. However, their geopolitical significance lies in how they are framed and contextualised. For example, Japan has long maintained close ties across the developing world. However, the Japanese press pointed out that Prime Minister Fumio Kishida's April 2023 trip to Africa, ahead of the G7 summit in Hiroshima in May 2023 (when Japan headed the grouping), was a departure from the norm, which saw summits typically being preceded by high-level trips to other G7 countries, not to the Global South.<sup>62</sup>

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In contrast, Kishida explicitly framed the trip as part of Japan's G7 leadership, rather than its longstanding ODA outreach: 'As the G7 chair, we will listen to and increase our involvement with the Global South.' He also positioned this outreach in the context of building Global South support around the Ukraine crisis. Before his departure, he told reporters: 'I hope to engage in discussions on the situation in Ukraine and other international issues, and reinforce our collaboration [...] With the very foundation of the international order facing jeopardy, I will deepen my discussions with the leaders of each of these countries and confirm our cooperation, and I will tie all our talks into the G7 Hiroshima Summit.'<sup>63</sup> Explicitly building support among Global South countries for these strategic initiatives is arguably an expansion of Japan's engagement in the developing world, and a reflection of the growing importance of its strategic cooperation with Western allies as it affects Japan's relationships with non-Western countries.

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61 Jesse Johnson and Kathleen Benoza, "Philippines, US, Australia, and Japan Hold Joint Military Drills in Disputed South China Sea", *The Japan Times*, April 7, 2024.

62 Rieko Miki, "Japan's Kishida Plans Africa Trip to Woo Global South ahead of G-7", *Nikkei Asia*, April 12, 2023.

63 Aggrey Mutambo, "Japan PM Fumio Kishida Visits Kenya as Part of His Africa Tour", *The East African*, May 2, 2023.

On the one hand, this attempt to integrate Africa into G7 conversations about the Ukraine crisis overlaps with Japan's growing cooperation with the US via groupings like the Quad and the Squad (with the US, Australia and the Philippines). On the other hand, it also arguably reveals the uniqueness of Japan's positioning.

First, while Kishida's outreach to East African littoral states like Kenya could be read as fitting into a US-led Indo-Pacific strategy, the reality is more complex. The US's Indo-Pacific strategy has become a keystone of its regional presence and its alliance-building via the Indo-Pacific Economic Framework and the Indo-Pacific Command. However, the concept was first coined by Kishida's predecessor, Shinzo Abe. In addition, while Japanese conceptions of the Indo-Pacific consistently include East Africa, that is not necessarily true of the US, which has historically seen the region as reaching only as far as South Asia.<sup>64</sup>

Second, the US framing was historically dominated by a security viewpoint. Yet Japan's conception favoured an economic and commercial view, with a strong focus on interconnectivity.<sup>65</sup> In March 2023, shortly before his trip to Africa, Kishida announced the allocation of \$75 billion via private investment, loans, ODA and grants to boost connectivity and cooperation in the region. 'We plan to expand the cooperation of the free and open Indo-Pacific framework,' Kishida said during a visit to India.<sup>66</sup> It is unclear how much of these funds would flow to Africa, although the region was mentioned, among others, as 'important partners in realising an FOIP [Free and Open Indo-Pacific]'.<sup>67</sup>

This focus on connectivity (perhaps ironically) positions Japanese conceptions of the Free and Open Indo-Pacific closer to China's BRI, which similarly emphasises connectivity, commercial engagement and closer links with Africa. However, these overlaps are not acknowledged by China. In response to Kishida's African visit, China's state press accused him of planning another colonial 'scramble for Africa'.<sup>68</sup> Together with Kishida's explicit positioning of his Africa tour in the context of G7 alliances, the Chinese reaction reveals how Japan's and China's competing relationships with Africa are increasingly functioning within larger narratives of geopolitical competition in the Global South.

## Conclusion

While Japan has long maintained a development-focused presence in Africa, the Japanese government is increasingly interested in broadening this presence. This

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64 Maxi Schoeman and Yu-Shan Wu, "The Evolving Indo-Pacific Region: An Introduction to External Perspectives on Africa's Role and Position", *Strategic Review for Southern Africa* 44, no. 2 (2022).

65 Cleo Paskal, "Indo-Pacific Strategies, Perceptions and Partnerships: The View from Seven Countries" (Research Paper, Chatham House, London, March 23, 2021).

66 Sakura Murakami and Krishn Kaushik, "Japan Plans \$75 bln Investment across Indo-Pacific to Counter China", *Reuters*, March 20, 2023.

67 Government of Japan, "New Plan for 'Free and Open Indo-Pacific': Policy Speech by PM Kishida", Kizuna, May 19, 2023.

68 Azhar Azam, "Japan's New 'Scramble for Africa'", *China Daily*, May 7, 2023.

includes catalysing new opportunities for Japanese companies in the context of a geopolitics-inflamed competition with China around issues like critical mineral access.

## While Japan has long maintained a development-focused presence in Africa, the Japanese government is increasingly interested in broadening this presence

These priorities are causing a shift within TICAD from traditional ODA-focused engagement to a more explicit business focus.<sup>69</sup> From 2008, TICAD's role as a space to facilitate new investment became more prominent. This shift also gained political will by being framed as part of national economic recovery policies. In 2013, Abe announced a five-year plan aimed at increasing private sector investments.<sup>70</sup> While in line with African demands for a post-aid future, the shift also reflected a determination on the Japanese side to shift the economic basis of its Africa engagement from ODA to investment, against the background of continually declining ODA budgets. This business-minded approach led to Abe including businesspeople in his official delegations to TICAD.

While the political system is increasingly aligned towards boosting investment, this has not necessarily been echoed in Japanese companies. It is becoming more evident that for the continent to expand this engagement, it will have to overcome perceptions among Japanese businesses that African investments carry high levels of risk.

The Japanese government emphasised its full partnership with the private sector by making Japanese companies official TICAD partners for the first time in 2019. This gathering was also framed as proving 'business-based innovative solutions'.<sup>71</sup>

Overall, the government has characterised this issue as a mismatch between risk perception and reality and is implementing counter measures.<sup>72</sup> These include the proactive sharing of information between the government and businesses, which frequently have low levels of knowledge about Africa. JICA has also been drawn into setting up public-private partnerships to lessen corporate risk. This has, for example,

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69 Céline Pajon, "[Japan's Economic Diplomacy in Africa: Between Strategic Priorities and Local Realities](#)" (Notes de l'Ifrri, Center for Asian Studies, Paris, December 2020).

70 Pajon, "Japan's Economic Diplomacy".

71 Dilini Pathirana, "[Promoting Japanese Private Investments in Africa: A Clash of Interests](#)", AfronomicsLaw, August 20, 2021.

72 Japanese Ministry of Finance, "[Statement by Kaneko Shunpei, Parliamentary Vice-Minister of Finance Ministry of Finance Government of Japan at the Fifty-Eighth Annual Meeting of the African Development Bank and the Forty-Ninth Annual Meeting of the African Development Fund](#)", May 23, 2023.

facilitated projects by prominent Japanese agribusiness companies like Ajinomoto and Kagome in countries such as Ghana and Senegal.<sup>73</sup>

Human resource development (long an ODA priority for Japan) has also received a business-friendly makeover, with training tailored to the fostering of skills bases that will support the African expansion of Japanese companies. JICA is similarly involved in boosting infrastructure development, such as in the form of business parks and special economic zones.<sup>74</sup>

Finally, direct derisking is also provided by the Japan Bank for International Cooperation and the state-owned insurance company Nippon Export and Investment Insurance. In addition, JOGMEC's role in facilitating Japanese investments in Africa's oil and gas sector has similarly been boosted, with its investment and loan guarantee budget doubling in 2016.<sup>75</sup>

More broadly, the expansion and refinement of balanced investment treaties with African countries, to satisfy both the demand for risk mitigation from firms and the call for more suitable dispute resolution mechanisms from African countries, could be an important factor.<sup>76</sup> While it is still too early to say how successful these measures have been, a 2023 survey by the Japan External Trade Organisation found that more than half of Japanese companies already invested in Africa planned to expand their operations there, while 58.4% of those companies were expected to make profits in 2023, the highest in four years.<sup>77</sup>

However, despite growing awareness of Africa's commercial potential and political will, driven by geopolitical anxiety, it remains unclear whether more Japanese companies will become willing to take on their Chinese counterparts by venturing into Africa, especially because Tokyo lacks the leverage that the Chinese government has over Chinese state-owned enterprises. For this reason, both FOCAC 2024 and TICAD 2025 will provide crucial clues about Africa's shifting position in a geopolitics-infused dispute between the two Asian powers.

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73 Pajon, "Japan's Economic Diplomacy".

74 Pajon, "Japan's Economic Diplomacy".

75 Pajon, "Japan's Economic Diplomacy".

76 Pathirana, "Promoting Japanese Private".

77 JETRO, "Survey on Business Conditions of Japanese Companies in Africa", December 21, 2023.



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## Cover image

Kenya's President William Ruto (L) attends a meeting with Japan's Prime Minister Fumio Kishida (R) in Tokyo on February 8, 2024 (Shuji Kajiyama/Pool/AFP via Getty Images)

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