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Partners Across the Divide: South Africa, Japan and Multilateralism in the Post-Aid Era

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Executive summary

Between August and November 2025, three developments pointed to a shift in the terms of Africa's engagement with the world. Japan used the Ninth Tokyo International Conference on African Development (TICAD 9) to signal a move from aid towards investment; South Africa chaired the first G20 summit held in Africa and secured a leaders' declaration over the boycott of the US; and within days, Washington announced that South Africa would not be invited to the 2026 G20 Miami Summit. Drawing on a SAIIA webinar convened on 19 February 2026, this briefing interprets these events as symptoms of a single transition, driven by two structural shifts. The first is geopolitical: the US is withdrawing from the institutions it built, leaving middle powers with a strong stake in keeping cooperation functional. The second is financial: official development assistance fell by a record 23.1% in 2025, and the donor–recipient model that structured Africa's external relations for six decades has substantially eroded. This model is now giving way to a bargain built on investment, trade and critical minerals in which African leverage is gradually rising. TICAD 9 and the G20 Johannesburg Summit can be read as responses to these shifts from opposite ends of the geopolitical spectrum: an established partner adapting to African leverage, and an African state exercising it. Japan and South Africa diverge on much, yet both appear to have concluded that their prosperity depends on institutions that outlast any single presidency. The measure of their partnership will be delivery: whether the post-aid bargain produces outcomes Africans experience as materially different.

Introduction

African agency in global governance is rising at precisely the time the system through which that agency is exercised has begun to fracture. It is against this backdrop that the South African Institute of International Affairs (SAIIA) convened researchers from Tokyo and Johannesburg on 19 February 2026. The aim was to take stock of what recent developments around TICAD and the G20 events revealed about Japan and South Africa, as well as the system they share.[1] The pairing is instructive. Japan is a Group of Seven economy and a treaty ally of the US; South Africa is a founding member of BRICS and a leading voice of non-alignment in the Global South. On Ukraine, sanctions and the desirability of continued Western primacy, Tokyo and Pretoria often read the world differently. Yet in 2025 both invested heavily in the same project: keeping rules-based, inclusive cooperation functional while its principal underwriter was withdrawing from it.

1 "Navigating in a Turbulent World: Insights from South Africa and Japan", webinar hosted by SAIIA, February 19, 2026. Speakers: Prof. Kenichi Doi (Institute of Geoeconomics, Tokyo), Takahiro Fukunishi (Institute of Developing Economies, Tokyo), Dr Cobus van Staden (China Global South Project), Luanda Mpungose (SAIIA) and Elizabeth Sidiropoulos (SAIIA); moderated by Steven Gruzd (SAIIA). References to "the webinar", "speakers" and "participants" throughout this briefing relate to this discussion.

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Drawing on that discussion, this briefing makes three connected arguments. First, the international environment is being reshaped by two structural shifts: the US's retreat from the order it built and the unwinding of the aid model that structured Africa's external partnerships for six decades. Second, TICAD 9 and the G20 Johannesburg Summit are best understood as responses to those shifts from opposite ends of the geopolitical spectrum: the first, an established partner adapting to growing African leverage; the second, an African state exercising it. Third, the South Africa–Japan relationship thus becomes a test of whether cross-bloc coalitions of middle powers can carry multilateralism through the present turbulence, and of whose terms will define the bargain now replacing aid. The sections that follow take each argument in turn, before closing with recommendations that emerged from the webinar.

An order without an underwriter

The first shift is geopolitical. Speakers returned repeatedly to the image of an interregnum: an old order weakening while its successor remains unformed. Institutions built after 1945, from the UN to the World Trade Organization, struggle to maintain consensus, and states increasingly pursue their interests outside the mechanisms designed to discipline them. However, the pressure on the system is not evenly distributed. One of the most notable developments of recent years has been the repositioning of the US, the order's principal architect. Washington has withdrawn from or threatened core institutions, dismantled its main development agency and converted trade policy into an instrument of political leverage. South Africa has felt this directly. A 30% tariff imposed in August 2025, then the steepest in sub-Saharan Africa, was followed weeks later by the lapse of the African Growth and Opportunity Act (later restored retroactively, but only to the end of 2026), and South African vehicle exports to the US fell by almost 75% in a single year.[2] Even Washington's closest allies, Japan among them, spent much of 2025 negotiating down tariffs of their own.

Other major powers complicate the picture: Russia, for example, has embraced open revisionism. China defends the multilateral institutions from which it benefits while building parallel financing and development mechanisms that operate on different terms.

2 Peter Fabricius, "AGOA Changes Add to Africa's Rollercoaster Ride of US Tariffs", *ISS Today*, March 13, 2026.

Lending under its Belt and Road Initiative follows a logic distinct from the models long promoted by Western donors, prompting debate over whether the coming order will accommodate plural development paradigms rather than a single template.

It is in this environment that middle powers have moved from the margins of analysis to its centre, as the states with the strongest interest in preventing outright fragmentation.

The 'middle power' label admittedly fits the two countries unevenly. South Africa has long embraced a middle-power identity, whereas Japan, a G7 economy that for decades ranked second in the world, rarely describes itself in those terms, even if some Japanese scholars have advocated a middle-power diplomacy. The term is used here functionally rather than as self-description, denoting states that shape outcomes through coalition-building and institutional maintenance rather than by commanding power. For them, the webinar suggested, the decisive question is not which great power prevails in the contest but whether the infrastructure of cooperation survives it. That reframing shifts attention from alignment, the question that dominates commentary on both countries' foreign policies, to maintenance: keeping forums, norms and habits of compromise alive until a more stable equilibrium emerges. It is on maintenance that South African and Japanese interests most clearly converge.

The end of the aid era

The second shift is financial. In 2024, for the first time in nearly three decades, France, Germany, the UK and the US all cut their official development assistance in the same year.[3] In 2025, the decline steepened. Aid from members of the OECD's Development Assistance Committee contracted by 23.1%, the largest annual drop on record, returning flows to their 2015 levels. US assistance fell by more than half, and bilateral aid to sub-Saharan Africa declined by roughly a quarter.[4] These are not cyclical adjustments. Within two budget cycles, the financial basis of the donor–recipient model that structured Africa's external relations for six decades has substantially eroded.

It is being replaced by investment, trade, infrastructure finance and, above all, competition for the critical minerals on which energy and digital transitions depend. In this emerging bargain, African leverage is rising. The continent has the world's youngest and fastest-growing population, a single market is being created under the African Continental Free Trade Area (AfCFTA) and Africa has vital resource endowments. At the same time, the continent remains underrepresented on the UN Security Council and in the governance structures of international financial institutions.

3 OECD, "Cuts in Official Development Assistance: OECD Projections for 2025 and the Near Term" (OECD Policy Brief, OECD Publishing, June 2025).

4 OECD, "A Historic Decline in Foreign Aid: Preliminary 2025 ODA Data", April 9, 2026.

Nor is the intellectual framing of the shift purely external. The Africa Expert Panel, convened under South Africa's G20 presidency and chaired by Trevor Manuel, called for a paradigm shift from aid dependence to investment-driven growth anchored in African agency.[5] Webinar participants broadly agreed that TICAD 9 and the G20 Johannesburg Summit are best read as two responses, from very different positions, to this transformation. Neither was primarily about aid, because aid is no longer the currency.

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TICAD 9: Co-creation as strategic repositioning

If those are the pressures, the two summits show the responses. Japan's flagship Africa platform illustrates how an established partner adapts. Since 1993, TICAD has been co-organised with the UN, the UN Development Programme, the World Bank and the AU Commission, a multilateral architecture that distinguishes it from the bilateral 'Africa plus one' summits of other powers. It was founded on principles of African ownership and international partnership at a moment when Western interest in the continent had receded after the Cold War.[6] What began as a five-yearly conference has been held every three years since 2016, alternating between Japan and Africa, and its record includes cooperation in infrastructure, health, education and agriculture.

The ninth conference, held in Yokohama from 20–22 August 2025 under the theme of co-creating innovative solutions with Africa, marked the platform's most explicit reorientation. Prime Minister Ishiba Shigeru framed the shift as one 'from aid to investment'. The outputs bore this out: no headline public pledge of the kind that produced $30 billion at TICAD 8, but $5.5 billion in infrastructure financing; an Economic Region Initiative linking Africa with the Indian Ocean economies; a corridor development partnership with Mozambique, Malawi and Zambia; and a human resource initiative in artificial intelligence and data science.[7] The commercial signal was unambiguous: 324 cooperation documents were signed, against 92 three years earlier.[8]

5 G20 South Africa, "Successes of South Africa's G20 Presidency", November 27, 2025; Africa Expert Panel, *Plan for Action* (October 2025).

6 Ministry of Foreign Affairs of Japan, "The Ninth Tokyo International Conference on African Development (TICAD 9)", accessed July 7, 2026, https://www.mofa.go.jp/region/africa/ticad/ticad9/index.htm.

7 "TICAD9: A New Direction and New Challenges", *The Diplomat*, October 28, 2025; "TICAD 9: Japan Shifts from Aid to Trade as Private Sector Prioritised", *African Business*, August 22, 2025.

8 Ministry of Economy, Trade and Industry of Japan, "The Ninth Tokyo International Conference on African Development (TICAD 9) Held", Press Release, August 22, 2025.

Japanese participants were candid about the drivers. Fiscal constraint at home and the fraying of the wider aid consensus made the old model unsustainable. At the same time, competition from China, the Gulf states, Türkiye and India has made inaction costly while Japan's economic security agenda, particularly the diversification of critical mineral supply chains, has given Africa new strategic weight. Viewed this way, 'co-creation' and 'mutual benefit' become less rhetorical and more descriptive of a more transactional, and potentially more equal, relationship. The style of engagement matters too: where some suitors compete on speed and spectacle, Japan's offer is based on reliability and quality, attributes that gain value as African governments grow more selective about the partnerships they enter.

South African speakers questioned whether the new language would produce a practice substantively different from the extractive patterns it claimed to supersede. The bilateral relationship offers a genuine test. Platinum, coal, manganese and titanium dominate South Africa's export basket to Japan, and its platinum group metals, manganese and vanadium are critical inputs for Japanese green technologies. Japanese manufacturers, anchored by the automotive sector and by Toyota's recent ZAR[9] 10.4 billion (about $634 million) commitment to new energy vehicle production, are among the most established investors in the South African economy.[10] Whether the next decade adds processing, beneficiation and technology transfer to that foundation, or accelerates the outward flow of ore, will determine whether TICAD's new vocabulary describes a new practice. The discussion suggested that Japan's comparative advantages position it well, but only if they are matched by South African policy certainty.

Johannesburg: Setting rules from the chair

If TICAD 9 showed an external partner adapting to African leverage, the G20 Johannesburg Summit showed an African state exercising it. South Africa's 2025 presidency was the first held by an African country and the fourth consecutive Global South presidency after those of Indonesia, India and Brazil. It was used less to request resources than to contest the rules that keep African economies structurally disadvantaged. The Africa Expert Panel confronted debt and the cost of capital directly, in a year in which African states were due to pay close to $89 billion in external debt service and 20 low-income countries were in or near debt distress. Its premise was that, despite improved macroeconomic management, African states still borrow at far higher costs than comparably placed peers elsewhere.[11] The Extraordinary Committee of Independent Experts, chaired by Joseph Stiglitz, delivered the first report on global

9 Currency code for the South African rand.

10 "President Urges Deeper South Africa-Japan Trade and Investment Ties", *SAnews*, August 21, 2025; "SA, Japan Move to Deepen Trade and Investment Ties amid Shifting Global Landscape", *SAnews*, May 5, 2026.

11 G20 South Africa, "South Africa's G20 Presidency: New High Level Panel to Tackle Africa Debt Crisis", 2025, accessed July 7, 2026, https://g20.org/news/south-africas-g20-presidency-new-high-level-panel-to-tackle-africa-debt-crisis/.

inequality commissioned for G20 leaders and proposed a standing international panel on inequality modelled on the Intergovernmental Panel on Climate Change.[12] Alongside its named priorities of disaster resilience, debt sustainability, just energy transitions and critical minerals, the presidency worked to convert the AU's admission as a permanent G20 member in 2023 from symbolism into practice.

The presidency's defining test, however, was political. The US boycotted the summit and pressed other members to accept a mere chair's statement in place of a consensus outcome. Instead, the 122-paragraph Leaders' Declaration was adopted on the summit's opening day, the first time since leaders' summits began in 2008 that a declaration was issued by G20 leaders without the US at the table.[13] Pretoria warned that 'coercion by absentia' could not be allowed to paralyse collective action.[14] For participants, the G20 Johannesburg Summit therefore demonstrated that the machinery of multilateral cooperation can still function without its most powerful member, and that sustaining consensus in its absence demands far more diplomatic effort than in the past. The spoiler dynamics that shadowed previously settled language on gender and climate throughout the year, and the unresolved dispute over the closing handover ceremony, were reminders of the forum's fragility.

2026 as stress test

That fragility was confirmed within days. On 26 November 2025, US President Donald Trump announced that South Africa would not be invited to the 2026 Miami Summit, declaring the country unworthy of membership 'anywhere'. This was the first attempt to exclude a member state in the forum's history.[15] Pretoria replied that South Africa belongs to the G20 'in its own name and right' and signalled that it would treat 2026 as a gap year rather than campaign for boycotts that would deepen the rupture.[16]

The stakes extend well beyond the bilateral insult. If a host can unilaterally determine membership, the G20's claim to be the premier bridge between developed and developing economies dissolves into a club of the willing, and every future presidency becomes an opportunity for exclusion.

12 The Presidency, Republic of South Africa, "Remarks by President Cyril Ramaphosa at the Handover of the Report of the G20 Extraordinary Committee of Independent Experts of Global Inequality", November 4, 2025; UN Office of the Special Adviser on Africa, "Africa's G20 Johannesburg Summit 2025: In Pursuit of Solidarity, Equality and Sustainability", December 2025.

13 Reuters, "G20 Summit in South Africa Adopts Declaration Despite US Boycott", *CNN*, November 22, 2025; "Diplomacy in Troubled Times: A G20 Summit Without the USA", *CIVICUS Lens*, January 2026.

14 Bloomberg, "US Warns SA Not to Issue a G20 Statement After Summit", *News24*, November 19, 2025.

15 Associated Press, "Trump Says He's Barring South Africa from Participating in Next Year's G20 Summit", PBS News, November 26, 2025; "Trump Will Not Invite South Africa to G20 in US", *CNN*, November 26, 2025.

16 "Can Trump Ban South Africa from 2026 G20 Summit, as He Says He Will?", *Al Jazeera*, November 27, 2025.

It is here that the South Africa–Japan relationship is most relevant. Japan will be at the table in Miami; South Africa will not. A functioning partnership would keep information, ideas and African priorities in circulation during a year in which the forum's inclusivity is suspended. Japan's stake is real: it depends on open markets and inclusive institutions more than most, and it has little to gain from a reduced G20. The point is not that the two countries agree: neither will leave its alignment, and they diverge on Russia and much else. It is that both have concluded, from opposite sides of the geopolitical divide, that their prosperity and security depend on institutions that outlast any single presidency. Middle-power cooperation of this kind will not restore the old order. It can, however, keep the scaffolding standing while a new one is negotiated, and help ensure that African agency is built into that order.

Conclusion and recommendations

The measure of the South Africa–Japan partnership over the coming cycle will be delivery: whether the post-aid bargain sketched at Yokohama and defended at the G20 Johannesburg Summit produces outcomes that Africans experience as materially different. The recommendations that emerged from the webinar, recast here as tests of that proposition, point the way.

- Anchor the partnership in industrialisation: Japanese investment should be aligned deliberately with South Africa's industrial strategy and the AfCFTA's integration agenda, so that co-creation is measured in factories and jobs.
- Invest in regulatory and institutional capacity: Japan's strength has long been institution-building; extending this to South Africa's regulatory, standards and skills systems would raise the returns on every other form of cooperation.
- Institutionalise trilateral Japan–South Africa–AU cooperation: the AU's G20 seat and TICAD's co-organiser structure create natural channels; using them systematically would give continental priorities a hearing both in Tokyo and at the G20 during a contested year.
- Conclude a critical minerals compact: South Africa should provide the policy certainty and physical security that investors require, while Japan commits to local processing and beneficiation. Mutual benefit becomes credible when it is testable.
- Treat technology transfer and local value addition as the test of co-creation: these, more than any declaration, are what distinguish a post-aid partnership from extractivism.
- Extend cooperation to climate, food security and just energy transitions. With traditional aid in retreat, Japanese development finance and technology can help close gaps that now threaten to widen in South Africa and across the continent.

- Build a TICAD think tank network: modelled on the Think20 and the BRICS academic forum, a standing research network would give the Japan–Africa relationship the epistemic infrastructure to generate ideas, monitor delivery and sustain dialogue between summits, including in years when the summits themselves are contested.

None of this guarantees success. But in an interregnum, the states that matter most are those that keep building while others tear down. On the evidence of 2025, South Africa and Japan have chosen to build an improbable partnership across one of the world's sharpest divides.

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Cover image

Akihiko Tanaka (L), president of the Japan International Cooperation Agency, speaking during a public-private dialogue session at TICAD 9, August 21, 2025, in Yokohama, near Tokyo (Kyodo News via Getty Images)

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