



Industrial interdependence is emerging within a contested field of overlapping external partnerships that compete for South Africa's and Japan's strategic attention.

Key Findings and Policy Implications

- Japan–South Africa relations have structurally shifted from development cooperation toward industrial interdependence and supply chain integration.
- TICAD no longer adequately captures the economic-security and geopolitical logic of the partnership.
- Overdependence on traditional diplomatic framing obscures the role of critical minerals, green energy transition, and digital infrastructure.
- Institutional coordination remains fragmented despite strong trade and investment flows.
- A ministerial-level Strategic Economic Dialogue is required to align policy with existing economic realities.

Executive Summary

Japan–South Africa relations are still frequently interpreted through the narrow lens of development cooperation and the Tokyo International Conference on African Development (TICAD). This framing increasingly fails to reflect the empirical structure of the relationship, which is now anchored in industrial interdependence, supply chain politics, and technological transformation within a complex multipolar context. Current scholarship suggests that the contemporary international system is characterised by an emerging multipolar order marked by systemic diffusion of power and intensified competition across economic and technological domains.¹ In this context, Japan–South Africa relations are better understood as part of a broader restructuring of global production networks rather than a donor–recipient development model. Empirically, Japan is consistently among South Africa’s top export destinations, ranking within the top five to seven markets, with exports reaching approximately USD 5.54 billion in 2025.² This trade relationship is reinforced by a significant investment footprint, with over 270 Japanese firms operating in South Africa and sustaining more than 200,000 jobs, particularly in the automotive and manufacturing sectors.³ Japanese foreign direct investment between 2015 and 2025 is estimated at nearly USD 2 billion, concentrated in high-value industrial sectors.⁴ This brief, therefore, argues that the relationship has already moved beyond TICAD’s developmental framing toward a reciprocal industrial alliance embedded in global supply chain restructuring, critical mineral geopolitics, and the green energy transition. South Africa’s increasing positioning as a continental industrial hub and AfCFTA gateway economy, as articulated by President Cyril Ramaphosa at the South Africa–Japan Business Forum on the margins of TICAD 9, reinforces this trajectory.⁵ Consequently, the brief recommends elevating bilateral governance to a ministerial-level Strategic Economic Dialogue to institutionalise this partnership through dedicated frameworks for green industrial corridors, digital innovation, and a proactive regional AfCFTA industrial strategy.

¹ Michael A. Peters, “The Emerging Multipolar World Order: A Preliminary Analysis,” *Educational Philosophy and Theory* 55, no. 14 (2023): 1653.

² Wesgro, *Japan Factsheet 2025*; DIRCO, “Japan–South Africa Relations.”

³ Department of International Relations and Cooperation, “Japan–South Africa Relations,” <https://dirco.gov.za/japan/bilateral-relations/>.

⁴ Wesgro, *Japan Factsheet November 2025*.

⁵ Cyril Ramaphosa, “Address by President Cyril Ramaphosa to the South Africa–Japan Business Forum... Yokohama, 21 August 2025,” DIRCO; Terence Creamer, *Engineering News*, 21 August 2025.

Introduction: Complex Multipolarity and the Reconfiguration of Partnership

The international system is increasingly defined by complex multipolarity, in which power is no longer concentrated in a single hegemon but is distributed across competing centres of economic, technological, and geopolitical influence. Current analysis conceptualises this shift as a transition toward systemic multipolarisation characterised by overlapping spheres of influence and intensified strategic competition.⁶ Within this environment, the emergence of “swing states” and influential middle powers, such as South Africa, is compelled to pursue diversified and adaptive foreign policy strategies defined by strategic flexibility rather than rigid bloc alignments. This includes balancing relations among traditional Western partners, emerging powers, and Asian industrial economies to mitigate external shocks and secure long-term development pathways.

Japan occupies a particularly important position in this recalibration. Celebrating more than 116 years of diplomatic relations in 2025, Japan and South Africa have developed institutional mechanisms, including the Japan–South Africa Partnership Forum (1999) and the Strategic Partnership framework established in 2010.⁷ However, despite this institutional depth, both academic and policy literature continue to overemphasise Official Development Assistance (ODA) and Tokyo International Conference on African Development (TICAD) as the primary lenses of analysis, producing a conceptual lag that obscures the industrial nature of the relationship.

Recent diplomatic engagements, including President Cyril Ramaphosa’s participation in TICAD 9 and the signing of a Memorandum of Cooperation on decarbonisation, signal a definitive shift in the partnership's trajectory. The relationship is no longer a donor-recipient model; instead, it has evolved into a strategic alliance focused on supply chain resilience, the green energy transition, and critical mineral governance. This reconfiguration aligns with Japan’s evolved “Free and Open Indo-Pacific” (FOIP) vision, which seeks to co-create solutions with African partners to ensure maritime stability and industrial co-development in a multipolar era.⁸

TICAD and the Persistence of Developmental Framing

⁶ Peters, “Multipolarisation: Twin System Rivalry at the Dawn of a Multipolar World” (2024).

⁷ DIRCO, “Japan–South Africa Relations.”

⁸ *Eyewitness News*, “Japan Strengthens Ties with South Africa as Global Tensions Rise,” 1 April 2026.

Since its inception in 1993, the Tokyo International Conference on African Development (TICAD) has served as the institutional anchor for Japan's engagement with the continent. Over three decades, the forum has evolved from a traditional aid-focused summit into a sophisticated platform that prioritises private-sector engagement, co-creation, and multi-stakeholder partnerships.⁹ However, despite this policy evolution, much of the academic and analytical literature remains tethered to an outdated developmental lens. This conceptual lag often fails to account for bilateral realities that are increasingly defined by industrial interdependence and economic security rather than donor-recipient dynamics

Current analysis suggests that Japan's Africa policy has shifted decisively toward geopolitical positioning and industrial strategy, particularly as Tokyo seeks to secure its role in a competitive multipolar order.¹⁰ While the TICAD framework provides a useful continental umbrella, it frequently encourages a view of Africa as a homogeneous development space. This obscures the emergence of sophisticated middle powers like South Africa, which act as differentiated strategic economic actors.

The key limitation of this TICAD-centric framing is that it prioritises ODA and technical cooperation while underplaying the structural weight of private-sector industrial integration. In South Africa's case, this imbalance is particularly pronounced. JICA's role is largely confined to technical cooperation, reflecting South Africa's upper-middle-income status, while the real engine of the relationship is industrial investment and trade.¹¹

Data shows that Japan remains one of South Africa's most important economic partners, with bilateral trade ranging from R130 to R155 billion annually. This relationship is anchored by over 270 Japanese firms operating in South Africa, which collectively sustain more than 200,000 local jobs, particularly in high-value sectors like automotive manufacturing and technology.¹² With investment flows exceeding USD 2 billion over the past decade, the partnership is clearly driven by the logic of industrial capitalism and supply chain resilience rather than development assistance.

South Africa's Strategic Agency in a Fragmented Global System

⁹ Japan International Cooperation Agency (JICA), "TICAD Overview," <https://www.undp.org/africa/ticad/overview>.

¹⁰ Cobus van Staden, "Japan's Engagement with Africa amid Geopolitical Tensions," *SAIIA*, <https://saiia.org.za/research/local-opportunities-and-global-disputes-tracking-japans-engagement-with-africa-amid-geopolitical-tensions/>.

¹¹ Japan International Cooperation Agency (JICA), *Republic of South Africa Country Analysis Paper* (2024).

¹² Wesgro, *Japan Factsheet 2025*; DIRCO, "Japan–South Africa Relations."

Contemporary analysis identifies a critical conceptual lag in the under-theorisation of African agency within bilateral frameworks. South Africa is frequently mischaracterised as a passive recipient of external engagement rather than an active architect of its own foreign economic strategy. This narrow interpretation obscures Pretoria's consistent pursuit of diversified partnerships aimed at mitigating the systemic risks of a fragmented global order.

As a prominent swing state within the emerging multipolar system, South Africa leverages strategic flexibility to navigate competing power spheres without entering into exclusive alignments.¹³ Its proactive engagement with BRICS, the European Union (as its only African strategic partner) through the TDCA, and the United States (via the African Growth and Opportunity Act) reflects a deliberate posture of multi-alignment. Within this diversified matrix, Japan is increasingly repositioned as a strategic industrial partner, a shift that prioritises investment and technological co-development over traditional development assistance.

Research insights on African agency are particularly relevant here, as they emphasise the need to reconceptualise Africa not as a passive site of external intervention but as an active participant in shaping international outcomes.¹⁴ This is evident in South Africa's positioning as a critical mineral supplier and industrial gateway to the African Continental Free Trade Area (AfCFTA), which connects it to a potential market of 1.4 billion people.

President Ramaphosa's articulation of South Africa as a continental industrial hub reflects this strategic orientation and reinforces the shift toward reindustrialisation through external partnerships rather than aid dependence.¹⁵

Japan's Strategic Position: Norms, Interests, and Indo-Pacific Geopolitics

Japan's engagement with Africa is structured by a dual strategic logic that integrates normative commitments to a rules-based international order with concrete economic security interests. On one hand, Japan aligns with G7 frameworks and promotes a rules-based international order through its Free and Open Indo-Pacific (FOIP) strategy, which marks its tenth anniversary in 2026. On the other hand, it maintains TICAD as a platform for partnership-based engagement that emphasises African ownership and co-development.

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¹⁴ Sofia Scialoja, "African Agency Revisited," *DCR*, 42.

¹⁵ Cyril Ramaphosa, DIRCO Speech, 2025

The Ministry of Foreign Affairs of Japan frames FOIP as a strategy grounded in maritime openness, the rule of law, and economic connectivity.¹⁶ However, analyses suggest that Japan's growing engagement with Africa is also driven by material considerations, particularly access to critical minerals and supply chain diversification.¹⁷ This is particularly evident in the updated FOIP framework, which prioritises the creation of resilient partnerships to maintain a free and open order amid heightening global tensions.

This dual orientation allows Japan to maintain strategic flexibility: it remains aligned with Western partners while simultaneously deepening engagement with Global South economies such as South Africa. Scholars further argue that Japan's Indo-Pacific trajectory reflects an adaptive middle-power strategy in response to systemic uncertainty and multipolar fragmentation.¹⁸

As a result, bilateral engagement is not merely a function of mutual preference but is structured by competing demands on diplomatic attention, investment flows, and strategic bandwidth. This creates conditions in which bilateral deepening requires deliberate institutionalisation to avoid marginalisation within broader geopolitical portfolios.

From Development Cooperation to Industrial Interdependence

The contemporary structure of Japan–South Africa relations is increasingly defined by industrial interdependence rather than traditional development assistance. This shift is anchored in deep-seated complementarities between South Africa's strategic mineral endowments and Japan's advanced technological capabilities. Current analysis suggests that this relationship has evolved into a structural symbiosis, essential for both nations as they navigate the transition toward low-carbon industrial models.

South Africa's control of approximately 70% of global platinum group metal (PGM) production places it at the centre of hydrogen fuel cell development and broader green transition technologies. Japan, in turn, provides advanced capabilities in hydrogen systems, electric vehicles, and industrial manufacturing ecosystems. This alignment moves the partnership beyond simple extraction toward an industrial co-production model.

¹⁶ Ministry of Foreign Affairs of Japan, FOIP Policy Document, <https://www.mofa.go.jp/files/100056243.pdf>.

¹⁷ CSIS, "Japan's Strategic Interests in the Global South and Africa," <https://www.csis.org/analysis/japans-strategic-interests-global-south-africa>.

¹⁸ Simran Walia, *Balancing the Rising Tides: Japan's Indo-Pacific Trajectory* (2026).

This creates a structural symbiosis in which both states are mutually dependent in the transition toward low-carbon industrial systems. The South African National Energy Development Institute (SANEDI) has explicitly framed this partnership as central to South Africa's emerging green hydrogen economy, with investment potential estimated at approximately R300 billion.¹⁹ This trajectory is further reinforced by recent bilateral milestones, including the Memorandum of Cooperation (MoC) on Decarbonisation signed in late 2025, and joint agreements aimed at enhancing supply chain resilience for critical minerals.

Ultimately, the bilateral logic has transitioned from a donor-recipient framework into one of strategic co-creation. By integrating South African resources into Japanese industrial value chains, both states are actively building a reciprocal alliance that addresses the economic security requirements of a complex multipolar order.

Digital Governance and Emerging Strategic Gaps

While industrial integration between Japan and South Africa is robust, the digital governance architecture remains insufficiently institutionalised. Significant gaps exist in the formalisation of bilateral frameworks for artificial intelligence (AI) regulation, cybersecurity, and digital trade governance. This represents a critical policy lag, particularly as the updated Free and Open Indo-Pacific (FOIP) vision now prioritises economic infrastructure for the age of AI and data, including investments in data centres and submarine cables.

The absence of structured cooperation in this domain is increasingly conspicuous given Japan's global technological leadership and South Africa's stated ambitions to lead the Fourth Industrial Revolution (4IR) on the continent. Although Japan pledged at TICAD 9 to train 30,000 AI personnel across Africa, bilateral efforts to harmonise digital standards have not yet matched the depth of engagement seen in the automotive and energy sectors.

Current analysis suggests that without a formalised digital innovation Framework, the partnership risks an uneven pattern of strategic integration. To secure long-term economic security, both nations must move beyond project-based digital engagement toward a coordinated strategy that aligns South Africa's infrastructure rollout with Japanese technological expertise in AI agriculture, cloud services, and digital trade.²⁰

¹⁹ SANEDI, "Powering Progress – South Africa–Japan Green Hydrogen Revolution," 2024.

²⁰ Simran Walia, *Balancing the Rising Tides: Japan's Indo-Pacific Trajectory: Geopolitical Shifts, Strategic Partnerships and National Vision* (London: Taylor & Francis, 2026).

Policy Recommendations: Advancing a Strategic Industrial Partnership

A key implication of this analysis is that Japan–South Africa relations have already moved beyond development cooperation logics, but the institutional and policy architecture has not fully caught up. The following recommendations are therefore aimed at aligning governance frameworks with the actual structure of the relationship under conditions of complex multipolarity.

First, a more explicit industrial framing would better reflect the scale of trade, investment, and corporate integration already present in the relationship.²¹ This means elevating bilateral engagement to a ministerial-level strategic economic dialogue independent of TICAD cycles. This mechanism should formalise a strategic industrial partnership, ensuring policy continuity and aligning governance with modern imperatives of economic security and supply chain resilience.

Second, South Africa and Japan should establish a structured green industrial corridor framework that focuses specifically on hydrogen, electric vehicle value chains, and critical mineral beneficiation. This would move cooperation beyond project-based engagement toward coordinated industrial planning, linking South Africa’s Just Energy Transition agenda with Japan’s hydrogen and decarbonisation strategy. The SANEDI-identified potential of a R300 billion green hydrogen economy underscores the urgency of such coordination.²²

Third, establish a digital innovation working group to harmonise standards for artificial intelligence (AI) governance, cybersecurity, and digital trade. This integrates Japanese technological leadership into South Africa’s digital infrastructure rollout and ambitions for the Fourth Industrial Revolution.

Finally, South Africa should more explicitly leverage its position as an AfCFTA gateway economy in bilateral engagement. This requires integrating Japan more deliberately into

²¹ Department of International Relations and Cooperation, “Japan–South Africa Relations,” DIRCO, <https://dirco.gov.za/japan/bilateral-relations/>; Japan International Cooperation Agency (JICA), *Republic of South Africa: Country Analysis Paper* (Tokyo: JICA, 2024), https://www.jica.go.jp/english/overseas/southafrica/_icsFiles/afieldfile/2024/10/16/jcap_za_en.pdf.

²² South African National Energy Development Institute (SANEDI), “Powering Progress – South Africa–Japan Partnership Set to Spark R300 Billion Green-Hydrogen Revolution,” PressPortal, 2024, <https://pressportal.co.za/energy-and-environment/story/powering-progress-south-africa-japan-partnership-set-to-spark-r300-billion-green-hydrogen-revolution.html>; Terence Creamer, “Ramaphosa Outlines Vision for Leveraging AfCFTA to Support Reindustrialisation,” *Engineering News*, 21 August 2025, <https://www.engineeringnews.co.za/article/ramaphosa-outlines-vision-for-leveraging-afcfta-to-support-reindustrialisation-2025-08-21>.

Africa-facing industrial strategies, enabling Japanese firms operating in South Africa to scale regionally across the 1.4 billion-person continental market. Ramaphosa's articulation of South Africa as a continental industrial hub provides an existing political foundation for this shift.²³

Conclusion

Japan–South Africa relations can no longer be conceptualised solely through the traditional developmental frameworks of the Tokyo International Conference on African Development (TICAD). Empirical evidence indicates a decisive transition toward industrial interdependence, supply chain resilience, and reciprocal alignment within a complex multipolar order. As the global system undergoes a structural transformation, defined by the rise of influential swing states and overlapping technological networks, Japan and South Africa have ceased to be donor and recipient. Instead, they have emerged as mutually embedded actors in a reconfigured global industrial landscape.

This partnership is now driven by the logic of strategic co-creation and the shared imperatives of economic security, particularly in green energy and critical mineral beneficiation. Consequently, the primary policy challenge is conceptual rather than operational: the persistence of an analytical conceptual lag in the literature continues to obscure the strategic depth of an already vital and evolving alliance. To secure a stable future in a fragmented global order, both nations must align their policy architecture with these new industrial realities

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²³ Cyril Ramaphosa, “Address by President Cyril Ramaphosa to the South Africa–Japan Business Forum on the margins of the Tokyo International Conference on African Development Summit, Yokohama, Japan, 21 August 2025,” Department of International Relations and Cooperation, <https://dirco.gov.za/address-by-president-cyril-ramaphosa-to-the-south-africa-japan-business-forum-on-the-margins-of-the-tokyo-international-conference-on-african-development-summit-yokohama-japan-21-august-2025/>; Wesgro, *Japan Factsheet 2025* (Cape Town: Wesgro, 2025).