

# Roundtable on “What Can Japan Achieve Through Co-Creation with the Global South?” (Jan. 21, 2026)

*This roundtable discussion was conducted based on information available as of Jan. 21, 2026, and does not necessarily reflect subsequent changes in circumstances.*

By *Japan SPOTLIGHT*

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## Participants



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*Prof. Emeritus Izumi Ohno*



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## Abstract of Discussion

### • The Global South’s Fundamental Stance

Global South nations avoid taking sides in conflicts between major powers like the United States and China, instead pursuing omnidirectional, balanced diplomacy focused on maximizing national interests.

### • The Global South’s Perspective on the International Order

While opposing the collapse of the current rules-based international order, they also express strong dissatisfaction with the existing rules designed under Western leadership, seeking cooperation premised on reform. Multilateral frameworks like the WTO and the UN are still recognized as important, with demands for greater voice and enhanced inclusivity for developing countries.

### • Balancing Climate Change Mitigation and Energy Security

Global South countries do not view decarbonization and energy security as conflicting concepts, instead prioritizing a phased and realistic approach to achieving both. Oil- and gas-producing nations in the Middle East, Africa, and Asia are pursuing strategies that leverage fossil fuels for the time being while redirecting revenues toward renewable energy, hydrogen, CCUS, and other technologies. Japan’s proposed “diverse transition pathways tailored to each country’s circumstances” align strongly with the approaches of these nations.

### • Japan’s Expected Role and Direction for Co-Creation

Japan is expected to serve as a “bridge” that translates Western idealism into practical solutions. Rather than competing with massive infrastructure funding, cooperation leveraging Japan’s strengths – such as long-term engagement, human resource development, and support for operational and institutional development – was deemed crucial. Co-creating concrete solutions tailored to each country’s circumstances in areas like disaster prevention, energy transition, and institutional reform was identified as the key to collaboration between Japan and the Global South.

## Introduction

**Toyoda:** Our roundtable discussion is on the theme “What Can Japan Achieve Through Co-Creation with the Global South?” The withdrawal of the US from global leadership has become pronounced. As a result, the “power struggle” between superpowers has intensified, leading not only to a significant reduction in the UN’s capacity for resolving international conflicts and causing confusion in addressing climate change, but also to the dysfunction of the WTO in the international economic sphere. In essence, there is a growing recognition that rebuilding the “rule of law” is essential. To achieve this, cooperation with the rapidly growing Global South – including ASEAN, India, the Middle East, and Africa – is indispensable, alongside collaboration between the EU and Japan as middle powers.

Today, we have gathered experts well-versed in the trends of the Global South to discuss four key themes. First, we will discuss how major Global South nations view the rivalry between major powers, in general terms, and how they position this issue. Secondly, whether they can cooperate in rebuilding a rules-based order, whether at the UN or the WTO. Thirdly, how they balance climate change measures with energy security, and finally we will discuss how the Global South views Japan’s role and what they expect from Japan.

Our panelists are Prof. Emeritus Shujiro Urata of Waseda University, who chaired the study group on “Co-Creation between the Global South and Japan” held at the Japan Economic Foundation; Prof. Emeritus Izumi Ohno of the National Graduate Institute for Policy Studies (GRIPS), who specializes in development cooperation with developing and emerging countries; Ms. Sachi Sakanashi, senior research fellow and director of the Japanese Institute of Middle Eastern Economies (JIME) and the Institute of Energy Economics, Japan (IEEJ), an expert on the Middle East; and Prof. Keiichi Shirato of Ritsumeikan University, who specializes in African studies.

I would like to begin by discussing how the major Global South countries view the rivalry between the superpowers. I would first like to ask Prof. Urata for his perspective on the general, cross-regional outlook. Do the Global South nations adopt a neutral stance, not aligning with either the US or China or Russia, or do they side with whichever best suits their national interests? What are your thoughts? Please also include reactions to the US attack on Venezuela that occurred in the first week of January.

### Perspectives on the Rivalry Among Super Powers in the Global South

**Urata:** Regarding the US-China rivalry and the intensifying conflicts between the US and both China and Russia, I observe that Global South nations are generally adopting a cautious and pragmatic stance. I think many of them are avoiding alignment with either camp, maintaining a neutral or near-nonaligned position. This is less

a value-neutral attitude and more a strategic choice to maximize their national interests.

I see at least three factors behind this. The first factor is economic. Many Global South countries maintain deep trade and investment ties with the US and Europe while also building significant economic relationships with China. Leaning heavily toward either side would entail substantial economic costs.

A second factor, I think, is the influence of historical experience. Having been buffeted by colonial rule and foreign rivalries during the Cold War era, there remains a deep-rooted wariness toward international orders and the imposition of values led by superpowers.

As a third factor, I would like to point to the movement toward multipolarity in the international order. I believe Global South nations strongly favor a multipolar international order – one independent of specific hegemonic powers, independent of the US, China, and Russia – through frameworks like BRICS, in order to enhance their own voice. This stance is evident in their attitudes toward UN resolutions and international conferences concerning the Ukraine war, where many Global South countries have abstained or adopted ambiguous positions.

Furthermore, as Mr. Toyoda mentioned earlier, regarding the US military action against Venezuela this past January, the Global South as a whole showed limited clear support for the US. Instead, many countries expressed concern from the perspective of respecting sovereignty and adhering to international law. This likely reflects vigilance against the possibility that military actions by specific superpowers could set precedents, potentially threatening their own security and sovereignty in the future.

As I mentioned, the Global South does not align itself with any superpower, but instead adopts a basic stance of strategic neutrality, choosing its position based on the situation while considering economic interests, security, and diplomatic autonomy.

**Toyoda:** Next, Prof. Ohno, from your perspective in observing the Global South through economic and development cooperation, could you offer any insights that might complement Prof. Urata’s views? Also, how do ASEAN and India perceive the US-China rivalry? India, in particular, is facing a 50% tariff from the administration of President Donald Trump due to its increased oil and gas imports from Russia. This appears to result in cooperation with Russia. What are your thoughts on this?

**Ohno:** First, regarding the positioning of the Global South amid US-China rivalry, I fully agree with Prof. Urata’s views. In addition to the points he raised, since the Lehman Shock, as low growth has become entrenched in developed nations, developing and emerging economies have increasingly shown economic growth rates surpassing those of developed nations. Consequently, the Global South, particularly emerging economies, has assumed a significantly larger role in the world economy. The share of the G7 countries in

the global economy has declined from about two-thirds in the 1990s to just over 40% in recent years. As a result, the Global South has increased its economic power and political voice, gaining substantial influence in the international community.

Furthermore, I believe that the US attack on Venezuela, or the Greenland issue, among other things, is accelerating a shift away from the US and a more cautious attitude toward it. The Greenland issue, in particular, has made the rift between the US and Europe very clear. In that sense, I believe that the current international order is being reorganized, with various players involved in a multi-layered and multi-dimensional way.

Regarding ASEAN and India, both ASEAN and India pursue omnidirectional diplomacy. Rather than aligning with one side in the US-China rivalry, I believe they will collaborate on a case-by-case basis to maximize their economic independence and security interests. For example, in the case of ASEAN, while Japan has put forward the Free and Open Indo-Pacific (FOIP) concept, ASEAN has issued its own guiding principle, the ASEAN Outlook on the Indo-Pacific (AOIP). While the AOIP emphasizes “ASEAN Centrality”, it aims to build highly inclusive and open relationships, including China. In other words, the very mechanism of ASEAN’s regional union and cooperation is designed to work together with diverse actors, including China and the EU. Here too, we see ASEAN’s stance emphasizing strategic autonomy.

India is a very complex case. The relationship between Prime Minister Narendra Modi and President Trump is not necessarily solid and has become quite delicate. India imports Russian oil for energy security reasons, and the US has imposed a 50% tariff as a sanction against this. Certainly, considering energy security, relations with Russia are extremely important, but for India, the US is also a crucial export market.

However, the US itself has taken positions that India finds difficult to concede on. For instance, it has attempted to mediate on issues highly sensitive to India, such as recent tensions between India and Pakistan. Additionally, in trade negotiations, the US has pushed for greater market access for American agricultural products. Considering this, while India understands the importance of its relationship with the US, it must also prioritize its own national interests, including its economy and energy security.

India’s relationship with China is also highly nuanced. While the two nations have various border disputes, they are both members of BRICS and the Shanghai Cooperation Organization (SCO). Economically, Chinese technology is crucial for realizing “Make in India”, yet there is also wariness about being dominated by China. In this sense, India appears to be building its relationship with China by carefully balancing each specific issue.

**Toyoda:** I’d like to ask Ms. Sakanashi for her perspective on the Middle East? While there is criticism of the US for double standards concerning Israel’s attacks in Gaza, the situation is complicated by the rivalry between Iran and Saudi Arabia in the region, making it

difficult for countries to openly oppose the US. What are your thoughts on this?

**Sakanashi:** From the perspective of Middle Eastern countries, the current situation is not framed as a forced choice between the US and China, or the US and Russia. At the same time, the war in Gaza has generated strong criticism in the region over what is widely perceived as Western double standards. From their perspective, the stance of the US and European nations – firmly condemning Russia’s actions in Ukraine while tolerating Israel’s military conduct in Gaza– seems inconsistent. This perceptions has significantly undermined the moral authority of the West. I would also like to point out that by criticizing this seeming double standard, countries like China and Russia are presenting themselves as advocates for developing nations.

However, Middle Eastern countries also tend to view the competition among major powers as an opportunity to exercise their strategic autonomy. For instance, regarding the Iran-Saudi Arabia rivalry mentioned earlier, even when tensions peaked in 2019 after Saudi oil facilities were attacked by unidentified actors, the US – Saudi Arabia’s long-standing ally – did not take punitive actions against Iran. Consequently, Saudi Arabia concluded that participating in the US-led efforts to contain Iran did not guarantee its own security. This led it to shift course toward improving relations with Iran. Notably, it was China that mediated the restoration of diplomatic ties between the two countries.

That said, countries such as Saudi Arabia and the UAE have no intention of severing ties with the US. Gulf States have come to recognize that regional stability is indispensable for realizing the economic development they seek, and US involvement is essential to their security. Accordingly, they are pursuing a pragmatic and multifaceted approach: cooperating with the US on security matters, with China on economic engagement, and with Russia on stabilizing crude oil prices.

**Toyoda:** I understand the situation is extremely complex. I’d like to ask Prof. Shirato about Africa. With the Trump administration dismantling USAID, China’s investment in Africa is increasing. How do they view the US-China rivalry? On the other hand, there seems to be dissatisfaction that Chinese investment doesn’t lead to increased local employment because they bring in workers from China. What are your thoughts?

**Shirato:** Africa has 54 independent nations recognized by Japan alone. While it’s difficult to find a unified stance when examining the details of each country, fundamentally, an African country is making strategic choices between the US and China to maximize its national interests. I think this line is largely consistent across the entire African region.

Prof. Urata cited three underlying reasons. The first was economic factors, the second historical circumstances, and the third how each

country behaves within the multipolar international order. However, looking at Africa, I think another element should be added: the political leaders of each country.

Africa inherently hosts diverse ethnic and religious groups within its borders, making the very nature of the nation-state – specifically, how to stabilize governance as a modern state – a fundamental challenge. Political leaders in each country face the dual challenges of securing their own regime’s stability and addressing their nation’s security within the African region, which is closely intertwined with that stability. African nations, with their vulnerable borders, are strongly influenced by how neighboring countries behave when determining their own positions. Therefore, it seems that the stability of their own regime and their nation’s security within Africa form a central axis for their actions.

For example, looking at the relationship between Kenya and Ethiopia, as Ethiopia moves closer to the BRICS side, neighboring Kenya has rapidly evolved its relationship with the Trump administration over the past year. Observing these developments, it seems African nations are guided by a dual set of principles: positioning themselves within the broader international order relative to the US or China, and simultaneously determining how to maintain political stability within East Africa or preserve national stability as a state.

Relations with China are naturally influenced by relations with the US. China’s investments in Africa recorded an annual stock of around \$46 billion in 2018 and have since remained consistently in the \$40 billion range. In other words, looking at the flow, while large inflows occur, there are also significant withdrawals. Over the past decade or so, roughly the same amount of investment has continued to flow in annually. Therefore, when viewed as stock, the investment amount shows neither a sharp increase nor a sharp decrease.

On the other hand, trade from China to Africa is noteworthy. According to 2024 statistics, China’s exports to Africa amounted to \$178.8 billion. Meanwhile, exports from Africa to China in the same year were \$116.8 billion. This indicates a massive trade surplus in China’s favor. China is simply exporting too much to Africa.

Looking at the trends in these respective exports and imports between Africa and China, exports from China to Africa increased 1.7 times over the 10-year period from 2014 to 2024. Conversely, exports from Africa to China, particularly mineral resources and crude oil, increased by only 0.9% over the same period. This means China’s trade surplus with Africa is rapidly expanding.

For Africa today, China has become its largest trading partner, surpassing the US and the EU, and goods continue to pour in relentlessly from China. Therefore, the dissatisfaction many African countries actually feel toward China isn’t primarily about China not creating local jobs. Far greater than dissatisfaction over China not generating employment is the massive influx of Chinese products.

This situation naturally becomes a source of discontent toward China. Consequently, China itself hopes that African nations will find ways to produce goods locally, reducing their reliance on Chinese

exports. To this end, China is providing various forms of support to African countries.

On the other hand, China faces overproduction, and the question of where to offload goods that no longer sell domestically has led to a trade surplus with Africa. In 2024, China convened African leaders in Beijing for the Forum on China-Africa Cooperation (FOCAC) summit, attended by President Xi Jinping. Even in such forums, I think China is grappling with how to control trade volumes and stabilize China-Africa relations.

On trade relations with Africa, the US presents a stark contrast. The US imposes tariffs on African products, which naturally causes African political leaders to rapidly shift away from America. But looking at specific cases, we see Kenya strengthening its ties while balancing relations with both the US and Ethiopia. Or, for instance, the presidents of the Democratic Republic of Congo and Rwanda visited the White House last December. They asked Trump to mediate their conflict and, in exchange, signed an agreement allowing American companies to develop Congo’s rare metals and other strategic resources. Looking at specific cases, we also see moves to leverage the Trump administration’s power. I think this represents the overall situation in Africa.

## Global South Cooperation for the Reconstruction of Rules-Based Order

**Toyoda:** Now, I’d like to move on to the second theme. Superpowers possess strength, so they may not require a rules-based order. but I think middle powers, or Asia which is becoming a middle power, cannot afford to think that way. What are ASEAN and India considering? Are they prepared to cooperate with Japan or Europe to realize the reconstruction of the rule of law? What are CPTPP member countries like Singapore, Malaysia, and Vietnam considering? Prof. Ohno, what are your thoughts?

**Ohno:** Right now, the very concept of the “rule of law” is being severely undermined. In this environment, I believe it is crucial for middle powers, including Japan, to firmly uphold laws and rules to safeguard their sovereignty while simultaneously building international consensus. In this sense, I think the fundamental perspectives of ASEAN and India are quite close to the direction Japan envisions, and also align well with European and other nations.

However, when considering trade aspects, there may be a slight difference in perspective between ASEAN and India. ASEAN has advanced regional cooperation and intra-regional coordination in various ways; so looking at specific issues, I sense some differences in how they approach economic integration.

Regarding the CPTPP, Singapore, Malaysia, and Vietnam are all members, and I think their stance of pursuing high-standard, high-quality trade and economic partnerships is very clear. Furthermore, the United Kingdom joined the CPTPP, which took effect in

December 2024, and the EU is now seeking to advance dialogue, including potential alignment with the CPTPP. I believe this reflects a growing consensus among the member nations that free trade remains critically important, and that its rules must be rigorously upheld even without the US.

It is regrettable that an international order without the US is emerging. Nevertheless, considering the possibility that the EU may join the CPTPP in the future, the expansion of the CPTPP – by countries already participating including Japan – as a framework to uphold free trade remains an important driving force for Japan and is highly valuable. India also fundamentally aspires toward free trade, but given its emphasis on protecting domestic industries, it has not joined either the RCEP or CPTPP at this stage. Its approach may be somewhat more gradual.

ASEAN, for its part, has been significantly strengthening economic cooperation with the Gulf countries, including holding a summit meeting with them in May 2025. China was also invited to participate. In this sense, I believe ASEAN's fundamental approach appears to be pursuing free trade while pragmatically forming alliances with various partners.

**Toyoda:** Various countries in the Middle East – Saudi Arabia, the UAE, Qatar – are now gaining significant influence. Ms. Sakanashi, how do they view the necessity of a rules-based order? Although they enjoy affluent lifestyles thanks to oil and gas revenues, what is their perspective on the importance of rules? While an FTA with Japan has yet to be concluded, are they prepared to cooperate with Japan in rebuilding the rule of law?

**Sakanashi:** Major Middle Eastern countries, particularly Saudi Arabia, the UAE, and Qatar, have become extremely wealthy through export revenues from natural resources. They are acutely aware that their influence within the international community has grown significantly in recent years. Moreover, these nations, which benefit from the current international order, are highly wary of unilateral changes to the status quo imposed by superpowers. It is said that the recent US actions against Venezuela reportedly heightened concerns in Saudi Arabia. Gulf States increasingly recognize that the existence of clear rules makes it easier to protect their own interests, rather than relying solely on normative commitments to those rules.

However, what the Gulf States are seeking is not the unconditional acceptance of rules unilaterally set by Western nations. I believe the prolonged negotiations between Japan and the Gulf Cooperation Council (GCC) on an FTA also reflect the Gulf States' strategic calculations on how to advance their own industrial diversification in the most advantageous manner. That said, the FTA negotiations themselves resumed in September 2024, with the second round of talks taking place in July 2025. Furthermore, the UAE president was scheduled to visit Japan in February 2026. It had been anticipated that during this visit, the bilateral Economic Partnership Agreement (EPA) with the UAE would finally be concluded, following the sixth

round of negotiations in December 2025.

*[JEF note, Feb. 2, 2026: the UAE president's visit to Japan was postponed due to the announcement of a general election in Japan scheduled for the same day.]*

While the GCC consists of only six countries, it is far from a monolithic bloc. Rather than treating the GCC as a single negotiating entity, it may be preferable to prioritize bilateral frameworks, as seen in the ongoing EPA negotiations with the UAE, which is leading the way ahead of the others. Relations between Saudi Arabia and the UAE, two major GCC countries, for example, are currently strained. It is said that the UAE's interventions in countries like Yemen and Sudan have angered Saudi Arabia. In this context, I think Japan can advance discussions with each GCC country, without waiting for the GCC to restore its unity.

Gulf nations are eager to expand cooperation with Japan beyond energy into diverse fields like clean energy, materials, and advanced technologies as they pursue decarbonization. I think they remain highly proactive in pursuing collaboration with Japan.

**Toyoda:** So the reason the FTA with the GCC isn't going well isn't because of Japan, but rather because the interests within the region itself are difficult to align?

**Sakanashi:** That is my view. We might have regarded the GCC as a unified bloc, however, precisely as each nation is enhancing its strategic autonomy today, their respective directions might gradually be inclined to diverge.

**Toyoda:** I would like to ask Prof. Shirato for his view on Africa? You have stated that the nature of TICAD9, held last August, has changed. I understand this shift as a transition from a forum for Japanese support to Africa to one where Japan seeks "mutual benefits". Do you believe it is possible for Japan to cooperate with Africa on rebuilding a rules-based order as their equal partner?

**Shirato:** Observing the various movements in African nations, I sense that while they themselves are establishing the rule of law as a fundamental principle, they are simultaneously skillfully incorporating what might be called Trump-style deals into their process of achieving partnership with the other nations. Therefore, my view is that if Japan seeks to cooperate with African countries, simply saying "Let's create rules, let's observe them" will likely not lead to a deepening of Japan-Africa relations.

Looking back at historical developments, the external conditions that enable fragile states like those in Africa to function as full-fledged nations are the principles of the modern international order – respect for sovereignty and the assurance that they won't be overthrown by other countries. If these principles aren't upheld, all African nations will collapse.

Venezuela drew significant attention due to the president's detention, but consider this: in 2025, Islamic extremist groups within

Nigeria suddenly faced a US military strike. At that time, the Nigerian government had strongly resisted the US military action beforehand. Unlike Venezuela, where the president was detained, the Trump administration launched a campaign against Islamic extremist groups that the Nigerian government had also been struggling to eliminate. However, the Trump administration initially attempted to proceed with the operation without involving the Nigerian government, meaning, from Nigeria's perspective, the matter was being handled over their heads.

Why did the US attack Islamic forces in Nigeria now? One theory suggests that the Trump administration chose to "attack Muslims, who oppress Christians, in order to save persecuted Christians around the world" as a public relations move aimed at its strong domestic base: Christian evangelicals and conservative white Christian groups. Nigeria may have been used for this purpose. Considering cases like Nigeria's, it becomes clear that unless rules like respecting sovereignty are properly upheld, fragile nations like those in Africa will be exploited indefinitely.

On the other hand, in Africa, there is also a movement to resolve matters through deals. Recent developments surrounding the conflict in the eastern Democratic Republic of the Congo are a prime example. This region has been in a state of civil war for about 30 years, since the 1990s following the Cold War. The UN, neighboring African countries, the African Union, and others have attempted mediation and sent peacekeeping forces, but none of these efforts have succeeded. However, last year, the Democratic Republic of Congo approached Trump and requested his mediation. Seeing conflict resolution as an opportunity to add to his legacy, the US president took an interest and stepped in to mediate.

In December 2025, President Felix Tshisekedi of Congo, President Paul Kagame of neighboring Rwanda, and President William Ruto of Kenya were invited to the White House. There, a peace plan for the conflict was drafted. This marked the first such initiative in this conflict since the end of the Cold War. Crucially, the agreement included provisions for American companies to develop rare earth metals in eastern Congo.

African nations, in a sense, also saw the Trump administration as a tool. They believed that unless they pursued Trump-style negotiations – deals that flouted established rules – their conflicts would remain unresolved. Alternatively, they reasoned that leveraging such power was the more realistic path to advancing resource development.

Even when proceeding based solely on rules, there are cases where companies must consider what benefits lie beyond those rules and conclude necessary agreements to expand their operations. Returning to Japan's situation, I think that unless Japan creates substantive deals to integrate its companies into its vision of advancing a free economic zone from the Indian Ocean to Africa, its relationships with African nations will not deepen.

**Toyoda:** Prof. Urata, can we say that the Global South in general

shares the sense of crisis about the collapse of a rules-based international order? How do they assess the US attack on Venezuela? In particular, how about Latin American nations' view on the crisis of the collapse of the international order? Brazil, for example, has had one of its nationals as WTO secretary general until recently. Do you think they share the sense of crisis about the international economic order and are ready to cooperate with other nations for its restoration? On the US attack on Venezuela, there seem to be different views, such as Argentine supporting the US and Brazil opposing it. What do you think?

**Urata:** Generally speaking, I believe the Global South shares a sense of crisis regarding the ongoing destabilization of the international order and the collapse of the rules-based international order. However, the nature of this sense of crisis does not necessarily align with that envisioned by advanced nations like Japan and those in Europe. In other words, for many Global South countries, the critical issue is not whether to preserve a Western-led order, but rather a sense of crisis over the normalization of a situation where superpowers arbitrarily manipulate international law and multilateral rules to justify unilateral force.

It is widely recognized that international law and multilateralism are fundamentally important institutional foundations for small and medium-sized countries and developing nations to protect their sovereignty from pressure by superpowers. Needless to say, if these foundations weaken, the Global South will ultimately suffer the most disadvantage. In this sense, I believe the Global South is wary of the collapse of the order.

As I mentioned earlier, the Global South does not unconditionally support the current rules-based international order. Rather, it harbors dissatisfaction that the present order is designed and operated to favor Western nations. I think many countries in the Global South consider that what is needed is not the maintenance of the order, but reform toward more inclusive and fair rules.

Regarding South American countries' views on the US attack against Venezuela, there is a significant difference between Brazil and Argentina. Specifically, Argentina has taken a position supporting the US. I believe the reason is that prioritizing recovery from its economic crisis and improving relations with international financial markets is its main concern. On the other hand, Brazil has traditionally prioritized strategic autonomy and multipolarism. So based on its principles of non-intervention and respect for international law, I think it maintains a critical stance toward unilateral actions by the US.

Regarding the international trade system, specifically the rules-based framework centered on the WTO, Brazil views this system as a crucial foundation supporting economic growth and industrial advancement for many Global South nations. So Global South nations believe that any dysfunction in this framework caused by conflicts between superpowers would directly disadvantage them. On the other hand, the Global South does not unconditionally

endorse the current international economic order, meaning the substance of the WTO. Many Global South countries perceive rules in areas like intellectual property, the environment, and the digital sphere as being designed and operated in a manner that favors developed nations.

In this sense, their stance seems to prioritize reform over merely maintaining the order or the status quo. While they oppose the collapse of the order, they also hold a dual position that is critical of maintaining the current state of affairs. The appointment of a Brazilian as WTO secretary-general seems to symbolize this stance. Brazil has traditionally prioritized multilateralism, making the enhancement of developing countries' voice a pillar of its diplomatic strategy. Its active engagement with the WTO system was likely based on the judgment that inclusive multilateral rules are indispensable to counter unilateral actions by superpowers. This perspective shares common ground with major Global South nations such as India, South Africa, and Indonesia.

Considering this, I think it is reasonable to assume that countries in the Global South are prepared to cooperate in rebuilding the international economic order. But this cooperation should not be about maintaining the existing Western-led order as it stands, but rather cooperation premised on reforms that reflect the interests and voice of developing countries. For the future stability and regeneration of the international economic order, it is also important to position the Global South not merely as recipients of such an order, but as agents of its reform.

However, observing recent trends, there appears to be a growing movement toward liberalization and market opening even among Global South countries. This stems from the belief that opening markets enhances efficiency and, crucially, enables the attraction of foreign direct investment, which is vital for economic development. One example is South America, where negotiations for an FTA between the EU and Mercosur have recently been concluded. Furthermore, while countries like India still retain some fairly closed sectors, they have become more open compared to the past. They have implemented an FTA with Australia and have reached an agreement in negotiations for an FTA with the EU.

**Toyoda:** For Japan, rebuilding rules and order is extremely important. However, I fully understand that the situation is quite complex, as maintaining the status quo alone will not necessarily gain support.

Moving on to the third theme: balancing climate change measures and energy security. Until very recently, it seemed that Europe and the US prioritized climate change measures while paying less attention to energy security. But the Trump administration has denied the climate change issue itself, while in Europe, amid soaring energy prices following Russia's invasion of Ukraine, more attention is being paid to energy security.

Japan, while not abandoning its own goal of decarbonization by 2050, has long argued that imposing the same obligations on

developing countries as on developed nations may be excessive, emphasizing the importance of balance. I would like to ask Ms. Sakanashi. Do Middle Eastern countries feel grateful that excessive climate change measures are being reined in? Are they prepared to adopt a pragmatic approach in cooperation with Japan?

## Climate Change & Energy Security

**Sakanashi:** Middle Eastern oil-producing nations have long perceived the West as pursuing decarbonization policies too aggressively. They have felt particularly strong unease about the pace and the uniformity of decarbonization. Consequently, the West's recent renewed recognition of the importance of energy security and its shift toward a more pragmatic approach is viewed as a welcome change by the Gulf States.

However, the Middle East is already experiencing the tangible impacts of climate change, such as extreme summer temperature rises. For Gulf nations, whose major cities are located along the coast, rising sea levels are reportedly regarded as an imminent crisis. As a result, the necessity for countermeasures is fully recognized. At the same time, these countries have consistently called for caution and a measured approach toward initiatives such as divestment – namely, the withdrawal of investment from fossil fuels – which have been particularly promoted by European countries. Within this context, oil-producing nations have also engaged more concretely in shaping new rules for climate change. The UAE's hosting of COP28 is a notable example. Gulf nations have repeatedly emphasized that while they are committed to actively reducing emissions, it is unrealistic to expect the immediate elimination of fossil fuels themselves.

In this context, Japan's long-advocated concept of diverse transition pathways tailored to each country's circumstances is highly compatible with the Gulf States in the Middle East. These countries view fossil fuels as an indispensable energy source for the foreseeable future, while seeking to leverage hydrocarbon revenues to expand investments in renewable energy, hydrogen, CCUS, and other low-carbon technologies.

Saudi Arabia's Vision 2030 is well-known. At the core of its strategy to diversify the economy in anticipation of a post-oil, or decarbonization, era is the use of fossil fuel revenues as capital for economic diversification. By jointly articulating and exploring concrete solutions – rather than mere slogans – to reconcile energy security with decarbonization, Japan and the Middle East can build a robust and enduring partnership.

In the field of decarbonization itself, Middle Eastern countries see significant potential for cooperation with Japan. Moreover, given the existing structure in which Japan relies on fossil fuels from the Middle East, transforming this one-sided dependency into a relationship of mutual interdependence will require close cooperation between Japan and Gulf countries in the decarbonization domain.

**Toyoda:** In Africa, some countries are rich in fossil fuels, while others possess abundant critical minerals essential for solar panels and batteries. Prof. Shirato, while it may not be possible to summarize it in a single phrase, can we consider it welcome that the importance of balancing decarbonization and energy security is being emphasized?

**Shirato:** According to the UN Department of Economic and Social Affairs' World Economic Outlook, global GDP growth for 2026 and 2027 is projected to be around 2.7%. However, Africa is forecast to exceed 4%, suggesting the African economy will continue to grow steadily for the foreseeable future. When considering energy issues, it is important to recognize two aspects: Africa is both a producer of energy resources and, due to its economic growth, will see its domestic energy demand rapidly increase.

First, looking at the movement of fossil fuels and renewable energy produced in Africa leaving the African continent, this depends heavily on how the global economy will develop. While the global emphasis on renewable energy has been shifting back toward fossil fuels since the Trump administration took office, it is unlikely this will directly benefit traditional African oil producers like Nigeria. The energy source attracting significant attention for future production growth in Africa is natural gas, rather than oil. In the natural gas sector, Mozambique is a country that, through development efforts, is finally reaching the level of practical production. There are projections that by 2035, approximately 5% of the world's natural gas production could come from African sources, centered on Mozambique.

Next, the expansion of investment in renewable energy remains a key point to watch. Despite some twists and turns, I think this trend will undoubtedly continue. Hydrogen energy deserves particular attention. Solar power stands as a prime example of renewable energy. According to the International Energy Agency's November 2025 outlook, new power generation capacity in Africa is projected to double its previous pace over the decade to 2035, increasing by approximately 24 gigawatts annually. Furthermore, 70-80% of this new capacity is expected to be supplied by renewable energy, primarily solar.

In Africa, electrification has historically been extremely low, barely exceeding 50% across the entire continent. Therefore, as new transmission grids and power plants are built and electricity networks expand throughout Africa, it is anticipated that renewable energy, particularly solar power, will become a major energy source rather than generating power from locally sourced fossil fuels. Regarding solar power generation, the primary investor at present is China.

Furthermore, significant investment is flowing into developing hydrogen energy, primarily in northern and southern African nations like Morocco, South Africa, and Tunisia – countries considered to have relatively high economic standards and technological levels within Africa. The aim is to consume this energy within the region

while exploring potential exports to Europe.

Concerns have also been raised about unexpected side effects surrounding solar power generation. Where systems for supplying electricity generated at large power plants to wide areas via transmission grids are inadequate, the introduction of solar power leads to the proliferation of small-scale local generation and transmission networks. This suggests that instead of building large power plants to supply electricity over wide areas as we might imagine, electricity will be produced and consumed at the village level using solar panels. China is now rapidly exporting solar panels to Africa. In the sense that previously unelectrified areas are becoming electrified, the situation is improving. But on the other hand, this approach cannot meet the electricity demands of large-scale industries, such as factories. So how to organize the overall power generation plan is becoming a major challenge.

Given Mitsui & Co.'s longstanding involvement in Mozambique's natural gas development, further investment by Japanese companies in the natural gas sector is also anticipated in Africa. Simultaneously, enormous demand for renewable energy is emerging year after year across Africa. How will Japanese companies enter this market? While Chinese companies are currently entering with overwhelming momentum, opportunities should exist for Japanese companies as well.

**Toyoda:** Asia is a region vulnerable to climate change impacts such as flooding, but it also includes countries rich in fossil fuels, such as Indonesia, Malaysia, and Brunei. Prof. Ohno, how do you think they are balancing climate change mitigation with energy security? Are they prepared to cooperate with Japan's proposed Asia Zero Emissions Community (AZEC) initiative?

**Ohno:** I think climate change countermeasures are not about ideals or principles; what really matters is how we make a realistic transition to them. For example, looking at ASEAN, decarbonization is necessary, but radically abandoning fossil fuels is difficult in reality. Furthermore, we cannot sacrifice economic growth and poverty reduction. This is why technology and funding are needed, and I believe this reflects ASEAN's overall position.

Considering this context, Japan's proposed AZEC is highly likely to be accepted. Indeed, ASEAN has agreed to cooperate on this at the Japan-ASEAN Summit, and concrete actions have already begun through entities like the East Asia-ASEAN Economic Research Institute (ERIA). AZEC is based on the principle of a phased approach tailored to each country's circumstances. It does not demand an overnight decarbonization leap and places importance on transition technologies like LNG, hydrogen, and ammonia. Combining this with technical cooperation, human resource development, and investment from Japanese companies creates significant potential for cooperation within AZEC. Indeed, AZEC represents a practical, reality-based "co-creation" platform where Japan and ASEAN, leveraging their respective strengths and

reflecting their actual circumstances, work together to find solutions to the shared challenge of decarbonization through concrete projects.

In November 2025, I participated in the “ASEAN-Japan Symposium: Co-creation in an Era of Geoeconomics” hosted by the Permanent Mission of Japan to ASEAN, ERIA, and the Indonesian think tank Foreign Policy Community of Indonesia (FPCI). Among the panelists at that time was the head of ERIA’s AZEC Center. He said the ASEAN Power Grid concept is very realistic, and that the first step is to shift to greener energy as much as possible. He also said that, given that ASEAN includes both mainland countries and many island nations, it is extremely important to distribute electricity fairly, overcoming geographical differences, so that it reaches the companies and people who need it. He further noted Japan’s smart system development technology could be very useful in building distributed power sources and power systems, especially for countries with many island regions, where it is difficult to build transmission and distribution systems. I think he emphasized his expectation that Japan would engage in concrete cooperation within the framework of AZEC.

Furthermore, regarding disaster mitigation and flood control, Japan itself is a nation prone to disasters and has accumulated extensive experience and knowledge over many years. So I believe there is significant potential for mutual learning through various forms of international cooperation. Amid significant shifts in the international order, while shared goals like decarbonization and sustainable development exist, challenges remain in how to realistically achieve them. I believe Japan has a role to play in translating the idealistic visions of the West, particularly Europe, into practical, achievable forms.

The Global South is demanding change, and the importance of a rules-based international order is undeniable. At the same time, rather than accepting the existing rules unconditionally, we should adapt them to function effectively in reality. In doing so, Japan should engage with the international community by offering concrete solutions, acknowledging national differences, and working collaboratively with partners. I think this is the path Japan should take.

**Toyoda:** As a general rule, can we assume that the Global South prioritizes balance? Or should we consider it on a regional basis? Brazil has just concluded COP30. What is its position? Prof. Urata, could you give us a comprehensive explanation?

**Urata:** Generally speaking, the Global South does not prioritize either climate change mitigation, decarbonization, or energy security. Rather, it takes a position that emphasizes balancing them. Many Global South countries are located in regions most vulnerable to the impacts of climate change, where droughts, floods, and extreme weather threaten economic and social stability. In this sense, the importance of climate change mitigation is widely recognized.

However, simultaneously, economic growth, poverty reduction, job creation, and stable energy supply for their citizens remain the highest priorities for these nations. Introducing radical decarbonization policies under conditions of insufficient access to electricity and fuel risks triggering social unrest and stalling growth. Consequently, I believe a balanced approach – one that seeks to gradually and realistically reconcile climate action with energy security rather than viewing them as opposing concepts – has become prevalent in the Global South.

I don’t think the approach to striking this balance differs significantly among countries in the Global South. For example, oil- and gas-producing nations in the Middle East and Africa view fossil fuels as a crucial means of earning foreign currency and currently position their use and export as a legitimate development strategy. However, the reality is quite different, with significant progress also being made toward directions like renewable energy production. In that sense, I believe there are commonalities with countries like India and Indonesia. In Asian nations such as India and Indonesia, I think they are moving towards expanding renewable energy while still utilizing coal and natural gas.

Latin American countries are seen as having relatively high renewable energy potential, with many demonstrating a proactive stance toward decarbonization, but they still strongly assert their right to development and energy sovereignty. In this context, Brazil, which has just concluded COP30, occupies a distinctive position even within the Global South. Brazil possesses a high proportion of renewable energy sources like hydroelectric power and biofuels, along with global environmental assets such as the Amazon rainforest. Consequently, while demonstrating an active stance on climate change measures to the international community, it also emphasizes the necessity of economic growth through agricultural development and resource utilization.

At COP30, Brazil clearly demanded that developed countries fulfill their responsibilities for financial support and technology transfer, while simultaneously taking a cautious stance toward imposing uniform reduction obligations on developing countries. I believe this reflects a position that does not reject decarbonization, but rather emphasizes a just transition that accounts for differences in stages of development. Brazil likely positioned itself as a representative of the Global South actively engaged in climate action, seeking to serve as a bridge between developed and developing nations.

Overall, the Global South shares a balanced approach to addressing global warming and ensuring energy security, though the specifics are heavily influenced by each country’s circumstances. Brazil’s case symbolizes the realistic and strategic stance of the Global South seeking to reconcile decarbonization with development.

**Toyoda:** I’d like to move on to the final question. It concerns Japan’s role, or rather the expectations placed upon Japan. While the era when Japan was valued for its large-scale aid has ended, I also hear that Japan is regarded as a trustworthy nation, rich in culture and

guided by the principle of pacifism. How do the Global South nations evaluate Japan, and what do they expect from it? There may be many points, but I would appreciate it if you could share one key aspect. First, Prof. Ohno, Ms. Sakanashi, Prof. Shirato, and finally Prof. Urata, please summarize your thoughts.

## Expectations of Japan

**Ohno:** It's about being a reliable partner. Rather than forcing things through power, like meddling in domestic affairs, it's about working together while taking account of the actual situation of partner countries. Isn't trust in such an attitude the most important thing? I think Japan is that kind of country, and we should think concretely about what we can do, keeping Japan's strengths in mind, and then act on it.

According to the annual report released by Singapore's think tank ISEAS, Japan has been ranked as the most trusted external partner for ASEAN for seven consecutive years, since the survey began. When compared to the US, China, India, and the EU, Japan is evaluated as the most reliable partner, accounting for 66.8% of respondents in the fiscal year 2025. I think it is particularly noteworthy that this percentage has increased from the previous year. However, as a point of caution suggested by the same report, when it comes to the question of whether Japan actually wields influence, the results indicate that its influence within the region, including economically, is not necessarily among the highest. So I think Japan should seriously consider how to leverage this "trust".

In a world without American leadership, I think Japan also needs to approach matters with strategic autonomy. Recently, I read an interview article in the *Nikkei* newspaper with Prof. Joseph Stiglitz of Columbia University. His remarks about international cooperation on climate change and free trade were particularly memorable. He stated that countries other than the US still have room to unite, and that those nations capable of doing so should firmly come together to steer the current system in a better direction.

Furthermore, Amitav Acharya, an Indian scholar of international relations at American University in the USA, recently stated that the current world is not "multipolar" but rather "multiplex". The term "multipolar" conjures an image of several major powers exercising hard power to shape the global order, but Prof. Acharya argues it is more than that. His perspective is that we are already transitioning to a "multiplex" world where diverse actors – not just superpowers, but also middle powers, regional communities and institutions, and civil society – are creating a new order through layered, multi-dimensional engagement.

He emphasizes that the key players are not necessarily only superpowers; it is crucial that each actor builds networks based on their own strengths and "niche", generating change from there. I believe this is precisely correct. Considering this, I think Japan has a significant role to play. By leveraging its strengths in human resources and technology, along with the trust it has cultivated,

Japan can co-create practical solutions. I think it can make meaningful contributions in this changing new world. Japan also has much to offer in areas like strengthening supply chains, addressing climate change and energy issues, and maintaining and strengthening the free trade system.

**Sakanashi:** Japan's greatest strength lies in its position as a neutral and trustworthy third party, as Prof. Ohno mentioned. As strategic rivalry between the US and China intensifies, the US has increasingly pressured Middle Eastern countries to curtail ties with Chinese companies as a condition for enhanced security cooperation with the US. One prominent example is the imposition of conditions on arms sales, including the refusal to provide F-35 fighter jets unless Chinese firms such as Huawei are excluded. Moreover, President Trump made Saudi Arabia, Qatar, and the UAE the destinations of his first overseas visits after taking office, while simultaneously adopting policies that have, at times, encouraged competition among these three states. For example, the US has extended explicit security assurances only to Qatar. As a result, other regional states seeking deeper cooperation with Washington must carefully assess US expectations and be prepared to accommodate them. Failing this, the US is unlikely to offer the level of cooperation they desire, reflecting the increasingly tough approach the US has adopted toward the region.

However, Japan's engagement with Gulf nations is not driven by such geopolitical calculations. Instead, Japan should fully leverage its reputation as a neutral and reliable partner with advanced technological capabilities. Going forward, we should keep aiming to deepen and diversify our relationships with the Middle East.

**Shirato:** If I had to pinpoint just one thing, I think the Japanese approach boils down to this. To elaborate a bit further, no matter what kind of country the US becomes, the Japan-US relationship is extremely important for Japan. At the same time, relations with China, the Korean Peninsula, and diplomacy toward neighboring Asian countries are also extremely important. Foreign countries and regions that Japan engages with are fundamental to Japan's national security. In other words, issues in diplomacy with the US, China, and Asian countries will inevitably come crashing down on Japan if left unattended. Japan must constantly continue to address them.

In contrast, problems from Africa rarely directly impact Japan. Therefore, to put it bluntly, Japan's diplomacy could theoretically choose to "avoid engaging with Africa". Looking at initiatives like JICA's Hometown Concept launched after last year's TICAD, it seems public opinion in Japan today includes the view that "in a globalizing world, Japan is no longer a major power, so it's better to minimize foreign relations and avoid interacting too much with foreigners."

In this context, what significance does it hold for Japan to deliberately pursue diplomacy with a region like Africa – a place, to put it bluntly, where Japan wouldn't suffer much if it didn't engage, and where few direct problems come flooding in from? Can the

Japanese people find any benefit or new opportunities in engaging with Africa? This is where Japan's capacity for international vision is truly tested. In the case of diplomacy toward Africa, I think the very question of whether to deepen or not relations with Africa is deeply connected to the point of "what position Japan wishes to occupy in the world".

Personally, as I mentioned earlier, I believe it would be in Japan's own best interest to choose to harness Africa's growth, which is said to be certain to expand at a rate of 4%, for Japan's own benefit. So, assuming we should engage, when considering "what constitutes a distinctly Japanese approach", I believe it lies in differentiating how Japan interacts with Africa from other nations. China, and furthermore Gulf nations like Saudi Arabia and the UAE, possess the financial capacity to provide funding for the foundational elements of a national economy – infrastructure and logistics networks – and build them from scratch. They have already begun doing this.

Japan was once able to do this in Southeast Asia. But attempting to do the same in Africa now would likely be difficult, as Japan no longer possesses that level of financial strength, and gaining public understanding would also be challenging. So competing in this area is not realistic. What can Japan do? I believe we should carefully recall what Japan achieved in Southeast Asia. Japan's strength lies not only in long-term engagement and infrastructure construction, but also in its emphasis on operations. Japan properly executed this in Southeast Asia: maintaining and inspecting infrastructure, ensuring stable operations, and cultivating the necessary personnel.

Finally, I would like to point out the problem that Japan's development elites, who possess extensive experience and knowledge regarding Southeast Asia, are not being involved with Africa. Those involved with Africa at JICA, or researchers, are called "Africanists" and have maintained a long-term commitment to Africa. On the other hand, personnel with vast knowledge, networks, and experience in Southeast Asia are not being assigned to Africa in large numbers, even at field offices like JICA or JETRO. Those of us involved in Africa must genuinely learn from the experiences in Southeast Asia and transplant that knowledge to Africa. Within Japan's various organizations, government agencies, JICA, JETRO, and corporations, there are many senior figures who have cultivated remarkable expertise in Southeast Asia. Building systems within Japan's diverse organizations and industries to redirect the capabilities of these individuals toward Africa is, I believe, a critically important challenge.

**Urata:** I think the Japanese approach mentioned by everyone, and Japan's role as a reliable partner, are crucial. Particularly regarding Official Development Assistance (ODA), Japan was once a major donor nation. While the amount of ODA has significantly decreased due to fiscal reasons and other factors, I think what matters is not the quantity but the quality – for instance, in areas like institutional design and management, human resource development, trust-building, and peacebuilding. These qualitative aspects are where

Japan possesses co-creation capabilities. I think we must increasingly leverage these strengths.

In this sense, Japan must steadily continue what it has been doing. It is also important to expand the experience gained in Southeast Asia to South Asia, the Middle East, Africa, and Latin America. However, given the diversity of Global South countries in various aspects, co-creation must be advanced in ways tailored to each country.

Regarding economic aid, China overwhelmingly dominates in terms of quantity. But various problems have been pointed out concerning Chinese aid. For instance, in infrastructure projects, China has been criticized for bringing in its own workers instead of hiring local labor, and for imposing very strict repayment terms, including high interest rates. In other words, while China's economic aid is large in volume, it faces significant problems in terms of quality. In contrast to such Chinese aid, Japan's aid, as I mentioned earlier, is highly regarded for its quality. To reiterate, it is crucial to strengthen the competitive edge of Japan's aid, namely its quality.

Beyond that, I think human interaction is paramount. I firmly believe that human interaction gives rise to all sorts of things. Having taught at a university, I keenly understand this, and I think international students play a significant role. For example, among students I know from China or Southeast Asia, some return to their home countries, but many continue living in Japan, starting businesses here, building relationships with their home countries, and expanding those connections. They contribute tremendously to this. It may take time, but Japan needs these steady, person-to-person connections. While Southeast Asian students make up a large portion of international students in Japan, there are relatively few from South Asia, the Middle East, Africa, or Latin America. It is crucial to accept more students from these regions, specifically from the Global South. To reiterate, I want to emphasize the importance of human relationships, particularly in human resource development.

**Toyoda:** Thank you very much. I think we are entering an era where qualitative contributions are becoming more important than quantitative ones. During my time at the Institute of Energy Economics, Japan, I also experienced many students coming from the Middle East. I still keep in touch with them, and I was listening to Prof. Urata's remarks thinking they apply to all regions. Regarding the shift from quantitative to qualitative contributions, I learned something very significant today. Thank you all very much indeed.

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