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The BRI vs FOIP:

Japan's Countering of China's Global Ambitions

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With the Donald Trump administrated U.S. turning inwards, the world saw Japan taking a step forward on the global stage during Prime Minister Shinzo Abe's tenure. Not only did the Abe administration take a more international stance, but it also took measures to counter China's Belt and Road Initiative (BRI). What then, is Japan doing to counter China's globally expanding power, and is it enough to compete with the world's second-largest economy? This article attempts to answer these questions by mapping out Japan's counterstrategy vis-à-vis China's BRI, while excluding military cooperation aspects such as the "Quad".

Introduction

The BRI was launched in 2013[1] and has provided much-needed infrastructure to developing countries. However, fears of how this initiative is being used for geopolitical influence are often raised. China's increased assertiveness in its neighboring maritime area, such as border disputes and territorial expansion,[2] has led to China being described as a security threat.[3] This is a point made explicitly clear in Japan's White Paper on defense from last year.[4] The fact that this year saw a record number of consecutive days with Chinese naval presence around the disputed Senkaku/Diaoyu islands[5] accentuated Japan's need to counterbalance China's increasing regional and global influence. It is not strange then, that Japan has assumed a leading role, together with other BRI critical countries,[6] with its "Free and Open Indo-Pacific" concept.

The "Free and Open Indo-Pacific" (FOIP) strategy was initiated by Prime Minister Shinzo Abe in August 2016.[7] It is a vision that sets the tone for Japan's international cooperation in a region where stability is vital to Japan's security and economy. The FOIP seeks to connect the Indian Ocean and the Pacific Ocean, with ASEAN as the "hinge" between the two. The "free and open" concept refers mainly to the rule of law, freedom of navigation, and free trade.[8] Although not explicitly stated, the FOIP is often interpreted as a countermeasure to China's BRI. This is not least so since it overlaps with the

Chinese "Maritime Silk Road" and because it emphasizes freedom, openness, and non-forcefulness, thereby attempting to distinguish it from the often untransparent[9] and economically unviable BRI.[10] The concept has also been employed by other nations concerned with China's assertiveness, mainly the U.S., India, and Australia.[11]

> ***Direct investment by Japanese companies in the Southeast Asia region doubled between 2012 to 2017.***

Countering China's "New Silk Roads" with Quality Infrastructure

Like the BRI, the FOIP is largely focused on infrastructure, with Japan's "Partnership for Quality Infrastructure", launched in 2015, at its core. The focus on "quality" is another way of distinguishing Japan's efforts from the BRI, citing economic efficiency and consideration of the local economy as part of its "essence".[12] This has made Japan a competitive alternative to the BRI, which except for its tendency to generate unsustainable debts also excludes local companies to a large extent, 89 percent being Chinese.[13]

The Partnership for Quality Infrastructure initiative, together with Asia Development Bank (ADB), in 2015 committed to providing infrastructure investments of 110 billion USD in Asia between 2016 to 2020,[14] and was further expanded to 200 billion USD in 2016 to be distributed around the world.[15] The "quality infrastructure" concept has also been employed in various configurations with other international actors.[16] Given its global outreach and role as counterbalancing measure to China, it is relevant to review Japan's activity in the regions where its quality infrastructure and other economic policies are competing with the BRI. Japan's investment and policy strategies and their impact vary region-to-region, as does the Chinese BRI. They will therefore be reviewed separately below.

Southeast Asia

Since ASEAN is positioned as the "hinge" between the two oceans, the region has been the main focus of Japan's investments in recent years. Besides the quality infrastructure projects, Japan is the biggest donor in Asia[17] and direct investment by Japanese companies in the Southeast Asia region doubled between 2012 to 2017, while at the same time decreasing by 30 percent in China as a result of Japan's "China Plus One" strategy of complementing facilities in China with facilities in Southeast Asia.[18]

Since 2018, the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) has also incentivized Japanese corporations to locate investments in the member states of the region through tariff alleviations.[19] Such measures have contributed to Japan's investments far exceeding the ones of China in the region.[20] China is the biggest external trade partner to the region, composing of 15.2 percent of ASEAN's trade in 2015, compared to Japan's 10.5 percent. But the difference is not overly significant and is surpassed by Japan and ASEAN's other trade partners when put together.[21] Japan's infrastructure projects in the six biggest economies of the region were valued to 367 billion USD in 2019, which is significantly more than China's 255 billion USD. This partly stems from the fact that trust in the BRI has decreased due to fears of excessive debt[22] and Chinese behavior in the South China Sea.[23] As a consequence, this has led to more and more countries turning to Japan's "quality infrastructure" alternative.

Japan was also a driving force in the establishment of the Trilateral Infrastructure Initiative in 2018 with the U.S. and Australia. The initiative also distinguishes itself from the BRI, as illustrated by a press release by Japan Bank of International Cooperation (JBIC), the main Japanese contributor, regarding the partnership's aims to "…[support] projects that are built to last; are financially sustainable; adhere to high international social, labor and environmental standards; ensure transparency; foster openness and inclusiveness; create economic opportunities for all, including women and local workers; enhance the resilience and self-sufficiency of host countries; and respect national sovereignty."[24] However, Japan's two co-partners do not invest the same amount, with the U.S. and Australian portfolios reaching 60 billion USD and 1.7 billion USD respectively.[25] Furthermore, the trilateral partners' focus on "high standards" prevents them from reaching China's competitive trademarks of "faster, less risk-averse, and more responsive support".[26] These might be some reasons for the trilateral pact implementing the "Blue Dot Network" (BDN) in November 2019. The BDN serves as a form of evaluation and certification system for infrastructure in the Indo-Pacific region. It is therefore a low-budget project, but with the potential to attract competition to the BRI since the development countries otherwise often are cause for concern among investors, given the risk of corruption and other issues.[27]

The struggle for dominance in the economies of Southeast Asia then, appears to be in Japan's favor, who is outpacing China in financial aid and foreign direct investment. Its quality infrastructure is also gaining ground as a competitive option to the BRI, although the latter still possesses attractive qualities of efficiency and the Trilateral Infrastructure Initiative by itself does not pose much threat to the Chinese regional presence so far.

The Pacific Ocean

Considering the trade potential in the Pacific Ocean, the former Trans-Pacific Partnership (TPP), has served as the biggest countermeasure to a Chinese rules-based trade order and a more balanced multipolarity in the Asia-Pacific region.[28] It was initiated by its signing in February 2016 as a free-trade agreement between countries on both sides of the Pacific Ocean.[29] Comprising almost 40 percent of the world's GDP, the TPP has been interpreted as an action to decrease economic dependency on China.[30] Japan's prime minister Yoshihide Suga even stated recently that China might have difficulties entering it under its current state, despite Xi Jinping expressing himself positive to joining it.[31] While the TPP was not initiated by Japan, Abe played an important role in keeping it together as the CPTPP[32] after Donald Trump's U.S. withdrawal from the partnership in January 2017.[33]

> ***Several former TPP member states in December turned to the Regional Comprehensive Economic Partnership.***

U.S. disengagement led to Japan seeking other trade partners, such as the EU and even China, shouldering the U.S. role as leader of global multilateral commitments.[34] While the U.S. did turn inwards, however, it also assumed a FOIP strategy of its own. The strategy, announced in November 2017,[35] differs from Japan's more inclusive vision since it takes an overtly antagonistic stance as a countermeasure against China, thereby discouraging many countries in the Indo-Pacific which do not wish to upset China.[36] While a trade deal between Japan and the U.S. was agreed upon in 2019,[37] it is rather limited compared to the TPP[38] and gone is the more pervading U.S. engagement in the Indo-Pacific and its role of upholding a liberal rules-based order.[39]

As a counterreaction to such isolationism, several former TPP member states in December turned to the Regional Comprehensive Economic Partnership (RCEP) alternative, where China is included. Comprising 30 percent of world population and world GDP, it is one of the biggest trade blocs in the world.[40] While it is not as comprehensive as the CPTPP, the deal is China's first multilateral trade deal, and will provide China with a framework where it can be part of setting the rules. Japan, which nevertheless is the nucleus of trade deals in the region, could still use the framework to reinforce coalitions against China, but with India's choice to not participate in the agreement, Japan lost much leverage to do so.[41]

In the Pacific Ocean region, Japan has played an active role in establishing the TPP/CPTPP and the RCEP, and it has therefore become a "spider in the web" of regional trade deals. But the U.S. withdrawal has presented China with opportunities to influence regional rules-setting and expanding its economic relevance, hence protecting it from decoupling measures and future anti-China trade coalitions.

Latin America and the Caribbean

On the other side of the Pacific Ocean, the Japanese Ministry of Foreign Affairs (MOFA) has based its Latin America and the Caribbean (LAC) relations strategy on the FOIP trademarks, such as "a free and open maritime order".[42] Increased connection and inclusion of LAC into the FOIP concept was pronounced by Abe in a speech in 2014.[43] Since the region has an infrastructure gap of 120-150 billion USD a year for sustainable economic development, South America has also become a target for the BRI.[44] This has made China the largest or second largest trading partner in all South American countries.[45]

> ***"Japanese FDI to LAC in 2017 reached 68.9 billion USD in 2017, far surpassing the yearly average of China, and its development finance is more evenly spread in the region.***

Nevertheless, tensions regarding Chinese dumping and over-dependence on China, whose state investments to the continent have decreased significantly in recent years, have become an impetus for diversifying the countries' supply chains to third-parties.[46] This has revealed opportunities for Japan. Indeed, Japan's quality investment model is said to be wanted in Latin America and China's ambitions together with the U.S. protectionist policies have given Japan incentives to invest in the region.[47] Japanese FDI to LAC in 2017 reached 68.9 billion USD in 2017, far surpassing the yearly average of China, which invested 90 billion USD between 2005 to 2016 in total (excluding financial centers).[48] In development finance too, Japan is rivaling China. LAC was the target of roughly 17 percent of JBIC's projects in 2018. Until 2013, Japan exceeded China in development finance, but thereafter China has been pulling away, and in 2018 China surpassed Japan by 30 percent.[49] However, the recipient countries of JBIC are much more diversified. In 2017, nearly half of China's development finance was received by Venezuela. In the same year, Brazil received slightly more from JBIC than from Chinese development banks, and in Mexico the amount received reached 20.1 billion USD, far surpassing 1.0 billion USD from Chinese banks.[50] This indicates a greater regional impact by the Japanese investments than the Chinese ones.

While the BRI's reputation in LAC has faded, Japan's quality investment model gains more and more traction. Its FDI to the region is far surpassing China's, and its development finance is more evenly spread in the region, though less than China's in aggregate amount. Still, China being the second or foremost biggest trading partner to every country of the region complicates the picture, as the influence over the region then is spread over various spheres. However, there is some concern of over-dependence on China which could open up opportunities for Japan and other countries to take part.

Africa

Making up the western edge of the Indo-Pacific, Africa also plays a big role in the FOIP strategy and Japan's countering of China. Since 2017, India and Japan have been collaborating in developing the Asia-Africa Growth Corridor (AAGC). The AAGC is described as a maritime route that rivals China's "Maritime Silk Road", connecting the two continents with ports: in Jamnagar, India, with Djibouti, and ports near Madurai, India, with ports in Mombasa and Zanzibar; but also by developing infrastructure within their growth poles.[51]

Considering Africa's development potential and the continent being the primary target of the BRI, it is not surprising that Japan would seek to take part in the current "scramble for Africa".[52] At the seventh Tokyo International Conference on African Development (TICAD) in 2019, Japan promised a 20 billion USD financing package to Africa. While the Chinese version the previous year of 60 billion USD was three times larger, this shows how Japan is trying to reduce China's economic and infrastructure footprint in Africa. Yet, Japan's economic inferiority to China hinders a more even competition: Abe remarked that Japan's last three years saw 20 billion USD of investment and ODA to Africa, falling short of the 2016 promise of 30 billion USD by a sizable margin.[53] Reluctancy toward investing in Africa among Japanese companies has been an obstacle in achieving the target.[54] This has made the influx of Japanese investments in the region dependent on Japanese governmental institutions.[55]

While Japan provides a more expensive choice than China, it has a generally more favorable image with its recognition as a "quality" option,[56] and the interest rate of Chinese loans are often three times the percentage of the Japanese ones.[57] Still, Japanese trade with Africa in 2018 reached only half of the 2008 level, measuring 17 billion USD, which is far behind China's 200 billion USD and Japan, therefore, has little chance of competing with China in Africa by itself.[58]

With China's trade to the region being roughly ten times bigger than Japan's, and Africa's peripheral location in the FOIP, it is not strange that Japan has little to show for. The Japanese "quality" alternative still remains a luxury product to many countries and competing with the BRI on infrastructure in the region on China's terms is a game Japan cannot win. Still, while Japan might be falling short of "belt and road" infrastructure, it is not short of initiative. Seeing that Japan's economy is a third the size of China's, Japan's financing package to the region also being a third of China's shows not an attempt to out-perform China, but to take an initiative for other countries to follow. In so doing, Japan is leading the way for a more diversified range of infrastructure providers.

Europe

Countering China has spilt over into Europe as well. The EU-Japan Economic Partnership Agreement in February 2019 was the world's biggest free-trade agreement and included an immense infrastructure deal for increasing connectivity between Europe and Asia, thereby further enhancing Japan's geopolitical relevance.[59] Although the agreement might have been implemented foremost as a way to fill out the vacuum of the U.S. disengagement, the deepening of EU-Japan relations since 2018 contains implicit measures to counter the BRI.

> ***Japan has taken initiative in most regions of the world to provide competitive alternatives to the BRI.***

The September 2019 EU–Japan Partnership on Sustainable Connectivity and Quality Infrastructure is significant in countering China since it aims to connect Europe and Asia and will be backed with 60 billion Euros by the EU. As the name suggests, it follows the line of the Japanese "quality infrastructure" concept and is infused with FOIP-related vocabulary such as "free and open trade" and "rules-based connectivity". Like the FOIP concept, the partnership does not openly antagonize China, but does so implicitly.[60] For example, Jean-Claude Juncker, the then European Commission president, hinted at the BRI when he vowed at the announcement of the partnership to build infrastructure "without mountains of debt" or relying on "a single country".[61] On the other hand, China made a move towards deeper connections with the EU through the Comprehensive Agreement on Investment (CAI) announced in December. The outcome was described as "modest" and is in no way close to Japan's collaboration with the EU but was still interpreted as an attempt by China to divide the U.S.-EU stance on China ahead of the presidency of Joe Biden, who is set to patch up the transatlantic gap that Donald Trump widened.[62]

Japan has initiated its own projects in Central and Eastern Europe (CEE), which has become a focus of the BRI. The economic exchange is still scant,[63] but the diplomatic intensification is more significant. For example, then Prime Minister Abe's state-visit to the heavily Chinese-influenced Serbia was interpreted as a countermove against China.[64] Also, Japan has in the last five years opened three new embassies in Eastern Europe, and Abe became the first Japanese prime minister to visit Ukraine in the countries' bilateral history.[65] While China has involved the CEE states in its BRI through its 16+1 initiative since 2012, many participating countries are now turning away from China due to disappointment with China's investments and many countries' democratic values.[66]

It remains to be seen how the EU-Japan collaboration on infrastructure will play out, but it is clear that Japan has a more intimate relation with the EU than China, particularly through its free trade and infrastructure deals, and with the CEE, partly owing to its democratic character. Stepping up its diplomacy in the CEE where China is increasingly losing its hold will certainly intensify these ties further.

Conclusion: Can Japan Compete with China?

The renaming of "One Belt, One Road" to the "Belt and Road Initiative" was supposed to make it sound more inclusive and less China-centric. While the BRI's opaqueness and reliance on China's gigantic economy has made it hard to join for other countries, however, Japan appears to be the one showing initiative. By not just focusing on its immediate neighborhood, Japan has taken initiative in most regions of the world to provide competitive alternatives to the BRI for developing countries. In some regions, such as Southeast Asia, Japan is even taking on the giant largely by itself, and is outperforming China in FDI and development finance, while at the same time providing a more heavily financed and competitive "quality infrastructure" alternative to the BRI.

China's most influential strength seems to be its position as the world's biggest export country, against which Japan usually falls short. However, Japan's initiatives of "quality infrastructure" and "free and open Indo-Pacific" have given Japan a leading role in countering China and is now pulling the strings for others, such as the EU, Australia, India, and the U.S. Now that the U.S. has got a new president, President Joe Biden is expected to get the country out of its self-isolation. But the FOIP concept that the U.S. has adopted is more antagonistic against China and tends to deter its allies from joining it, whereas Japan's more inclusive and covertly antagonistic concept often is considered a more appealing option. Thus, it remains to be seen if the U.S. can lead the world in countering China and the BRI as tenaciously and purposefully as Japan has been doing. ■

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