

# The “Marine Industrial Complex”: Japan’s Integrated Engine for Crisis- management and Growth

Shinichiro Takiguchi\*  
takiguchi.shinichiro@jri.co.jp

Following the ruling party’s decisive electoral victory, recent policy frameworks - notably those championed by Ishikawa et al. [2026] - have underscored the urgency of forging a "strong and prosperous economy." To capitalize on this momentum, I propose the launch of the “Marine Industrial Complex”. This strategic initiative seeks to move beyond traditional boundaries, unifying crisis-management investment with growth-oriented capital to unlock Japan’s ultimate frontier.

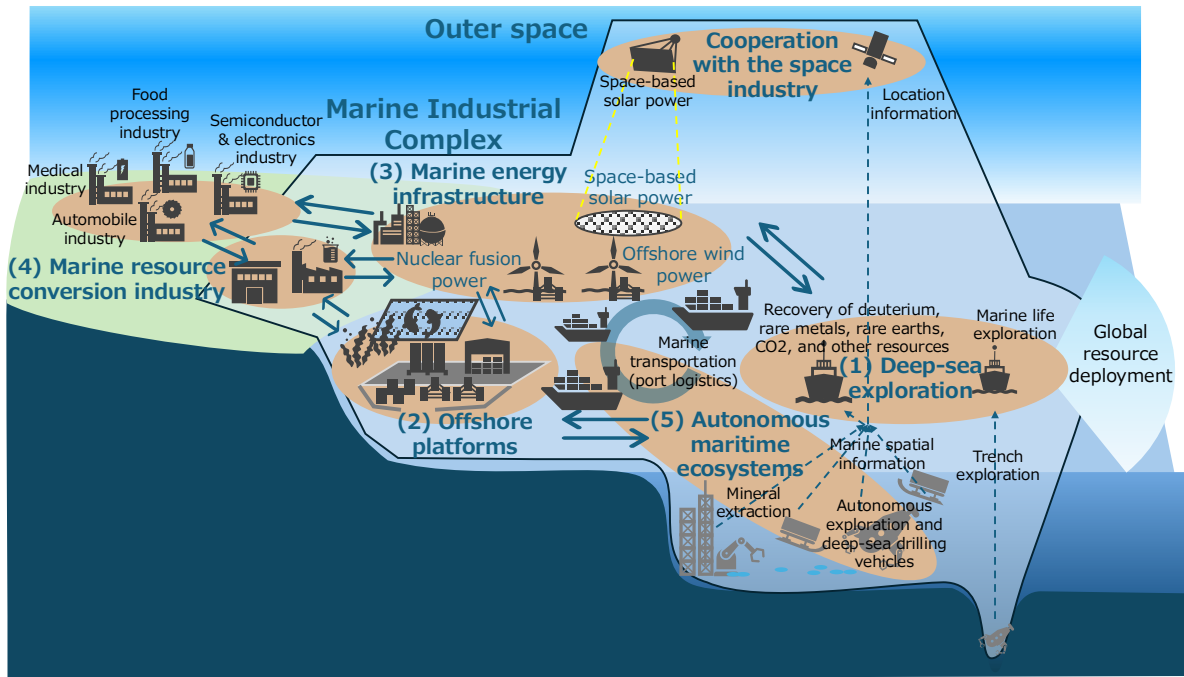
## 1. Defining the New Industrial Consortium

The Marine Industrial Complex is not merely a sectoral policy but a "New Industrial Consortium." It aims to harness Japan’s vast, underutilized maritime domain to strengthen economic security and sharpen industrial pre-eminence through five strategic pillars: (1) Deep-sea Exploration: scaling the survey capabilities and seismic research excellence pioneered by Japan’s oceanographic institutions. (2) Offshore Strategic Platforms: leveraging world-class maritime engineering to construct hubs for seabed resource recovery - targeting manganese nodules, cobalt-rich crusts, and hydrothermal deposits - while hosting next-generation energy facilities. (3) Integrated Marine Energy: deploying offshore wind, wave, and tidal power to create self-sustaining energy loops for coastal and remote island industrial clusters. (4) Mineral Resource Conversion Industry: establishing mid-stream processing hubs to transform raw marine minerals into high-value industrial inputs. (5) Autonomous Maritime Ecosystems: implementing autonomous navigation and submersibles to bridge remote territories, facilitating seamless exploration and logistics.

Crucially, this vision demands cross-domain synergy with the aerospace sector. By integrating satellite positioning with underwater acoustic communication, Japan can map the seafloor with unprecedented precision, while maritime hubs serve as receiving terminals for Space-Based Solar Power (SBSP).

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## 2. Strategic Objectives

### (1) Integrating Sectors into a Growth Pillar

By organizing the “Marine Industrial Complex” as a flagship project, Japan can organically link six of its seventeen strategic fields: marine affairs, shipbuilding, port logistics, materials (critical minerals and components), fusion energy, and aerospace. This integration bridges the gap between high-risk crisis management investments, where private entry is often difficult, and new growth investments, thereby catalyzing a nascent industrial pillar.

### (2) Building a Hub for Next-Generation Technology

As China rapidly expands its capabilities in Human Occupied Vehicles (HOVs) and Autonomous Underwater Vehicles (AUVs), Japan must enhance its oceanic spatial data collection. This hub will drive the mining of rare metals and rare earths, the advancement of underwater robotics, and the promotion of “Blue Carbon” initiatives such as ocean-based CO<sub>2</sub> capture, utilization, and storage (CCUS) and seaweed cultivation. Early investment in revolutionary, low-cost marine energy, including fusion and floating offshore wind, will secure Japan’s position at the technological frontier.

### **(3) Transforming from a Resource-Poor State to a Maritime Power**

Japan possesses the world's sixth-largest Exclusive Economic Zone (EEZ). By constructing an industrial complex that harnesses its strengths in maritime engineering, Japan can mitigate geopolitical risks. Strengthening the resilience of the nation's economic foundations through marine research and securing resource autonomy via seabed rare earths will transform Japan's strategic direction in an increasingly volatile global landscape.

## **3. Proposed Policy Package**

### **(1) National Strategic Special Zones**

Establish a public-private fund to facilitate multi-year investment cycles. Priority financial support should be directed toward projects and businesses within the designated National Strategic Special Zones.

### **(2) The Marine Industry Fund**

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### **(3) Japan-U.S. Joint Development**

The development of deep-sea rare earths represents a promising frontier for bilateral cooperation. Given that the United States also possesses a vast EEZ, joint development and future export to third-party markets should be prioritized within the diplomatic agenda.

### **(4) Regional Revitalization and Industrial Policy**

Integrate the "Regional Future Strategy" to encourage corporate clusters at maritime hubs. This includes supporting startups, promoting dual-use technologies, and fostering the endogenous growth of local small and medium-sized enterprises (SMEs).

### **(5) R&D Synergy**

Accelerate innovation by aligning with the Cross-ministerial Strategic Innovation Promotion Program (SIP), the Moonshot Research and Development Program, and the Key and Advanced Technology R&D through Cross Community Collaboration Program (K-Program). Areas of focus should include advanced shipbuilding, deep-sea smelting, and bio-material manufacturing.

## References and Interviews

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- This is a English version of “「海洋産業コンプレックス」を危機管理投資と成長投資の一体推進のエンジンに” in JRI View Point (The original version is available at <https://www.jri.co.jp/MediaLibrary/file/report/viewpoint/pdf/16517.pdf>)

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