

# Scaling to Japan: A Practical Guide for European Innovation & Growth



Global outreach

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## WHO WE ARE



European Institute of  
Innovation & Technology

A body of the European Union



The European Institute of Innovation and Technology (EIT) is a unique and strategic EU initiative, established in 2008 to bolster European innovation by seamlessly integrating the 'knowledge triangle' of business, education, and research. Its mission is to develop impactful solutions to pressing global challenges, positioning Europe as a leader in addressing critical issues. By fostering dynamic, pan-European partnerships known as Knowledge and Innovation Communities (KICs), the EIT acts as a catalyst, amplifying Europe's capacity to generate sustainable economic growth, create high-quality, future-proof jobs, and enhance its overall competitiveness.

Since its inception, the EIT has experienced significant growth, expanding its network of KICs to address a wide range of strategic domains. These include: EIT Climate-KIC, EIT Digital, EIT InnoEnergy, EIT Health, EIT Manufacturing, EIT Food, EIT Urban Mobility, and EIT Culture & Creativity.

These KICs operate as autonomous partnerships, bringing together leading higher education institutions, research organizations, and businesses to foster

innovation and entrepreneurship. They provide education and training programs, support startups and scaleups, and drive research and innovation projects.

Beyond its regional impact, the EIT plays a crucial role in strengthening Europe's ability to tackle complex societal challenges, ranging from climate change and digital transformation to sustainable energy and healthcare. Through its unique ecosystem, the EIT fosters an entrepreneurial mindset and equips individuals with the skills needed to thrive in the innovation-driven economy.

Furthermore, the EIT's strategic alignment with the EU's broader policy goals, such as the European Green Deal and the Digital Decade, underscores its importance in driving the continent's transition towards a more sustainable and digitally advanced society. By investing in human capital and supporting the development of cutting-edge technologies, the EIT empowers Europe to remain at the forefront of global innovation and maintain its competitive edge in an increasingly interconnected world.

## EIT IMPACT IN NUMBERS:

# 2,400+

partners in the  
network

# 70+

innovation hubs across  
Europe and beyond

# 9,900+

ventures supported

# 2,450+

new products  
launched to market

# 880,000+

learners trained  
in new skills

# EUR 72+

billion total valuation of EIT-supported  
companies and start-ups





As an integral part of the EIT Community, the EIT Global Outreach programme extends the reach of EIT's innovation framework globally, supports the **growth of EU startups** and **increases their revenue** by **scaling to new global markets**, **launching innovations**, and **raising investments**. As a strategic conduit between EIT's robust innovation ecosystem and leading innovation valleys worldwide, the programme establishes vital synergies with global innovation leaders, creating substantial value for the European economy and partner ecosystems. Positioned at the forefront of EIT's international strategy, the Global Outreach programme includes innovation hubs in key global locations such as Silicon Valley, the UK, and Israel, and it is actively expanding to embrace new regions. This initiative is pivotal in spreading EIT's impact-driven innovation model across continents, fostering global collaboration and sustainable development.

EIT Global Outreach has significantly advanced global innovation and growth as a result-oriented initiative. The initiative has catalysed substantial investments and expanded market reach by supporting numerous

startups and scaleups, enhancing enterprise potential. Training professionals across diverse sectors have bolstered the innovation ecosystem's capacity to drive progress and foster new ideas. Engaging various corporates in open innovation activities has boosted industry-wide innovation. The Global Outreach efforts have resulted in launching and market testing innovations, showcasing our commitment to delivering tangible results. Through consortium-building events with stakeholders from Europe and the outreach locations, we have expanded our network and influence, enhancing cross-border collaborations that position European startups and companies for success in competitive markets.

The EIT Global Platform, an integral part of EIT Global Outreach, equips European innovators with the tools to engage in global impactful, real-time innovation initiatives. This platform enhances collaborative opportunities by bridging EU innovation capabilities with worldwide ecosystems, driving significant advancements and mutual growth in tackling global challenges



# THE EIT GLOBAL OUTREACH IMPACT IN NUMBERS

## 97+

Startups and  
Scaleups supported

## 25

Corporates supported open  
innovation activities

## ~€100M

Direct investment attracted by  
supported startups and scale-ups

## 29

Innovations launched  
and tested in the market

## +220

Professionals trained – TTOs, accelerator  
managers, innovation managers, MBA  
programme managers, etc

## 17+

Consortium building events  
with over 800 participants  
from the EU, UK, Israel,  
Canada and Japan

## €3M

Won in 2 cross-border  
multilateral Horizon Europe  
submissions through GO  
matchmaking events



# ABOUT THE REPORT

## Why Japan? Why is it for you?

Enlarge the dive into the **epicentre of global tech** with the EIT Global Outreach's detailed report on Japan, a formidable economic giant and a pivotal player in the technological arena. Japan continuously strengthens its position through **robust investments, innovative strategies**, and a commitment to advancing **cutting-edge technologies**. As the world's **third-largest economy** with a **GDP of \$4.4 trillion**, Japan is an essential ally for European tech pioneers. Led by Tokyo, ranked among the **top 10 global startup ecosystems**, Japan offers unmatched opportunities for growth and collaboration.

This report is specifically designed for a diverse European Tech Ecosystem audience, including startups, SMEs, corporates, investors, universities and research labs, governmental organizations, and municipalities. It aims to equip all stakeholders in the European tech ecosystem who are considering building bridges and collaborations overseas with the necessary insights and tools.

**Tailored for the European Tech Ecosystem**—including entrepreneurs, innovators, funders, ecosystem leaders, researchers, and decision-makers—the report unravels Japan's advanced sectors such as AI, Robotics, Smart Manufacturing, and BioTech. Fueled by legendary firms like **Toyota, Sony, Mitsubishi, and Takeda**, which are at the forefront of global innovation, Japan invests **\$180 billion annually in R&D** to spearhead developments that resonate deeply with Europe's strategic interests, including **green technology**

*"This isn't just exploration; it's an opportunity to engage with a nation shaping the global tech landscape."*

**and digital transformation.** Each locale, from the bustling innovation hubs of **Tokyo** to the historic tech-savvy streets of **Kyoto**, offers fertile ground for technological advancements and international partnerships, positioning Japan not just as a market but as a **gateway to expansive growth and technological leadership in Asia.**

This isn't just exploration; it's an opportunity to engage with a nation shaping the global tech landscape. Let Japan inspire you with its myriad opportunities, positioning itself as a market and a vital nexus for European innovators like you, who are eager to significantly impact global innovation. Discover why now is the **perfect time** to join this dynamic ride as you stand at the threshold of Japan, **the indispensable hub** for amplifying your influence across Asia and beyond.

### Report Objectives



**Comprehensive Overview:** Provide a concise yet detailed overview of Japan's tech ecosystem, focusing on areas vital to European interests such as specific regions and key sectors.



**Identify Opportunities:** Pinpoint and examine opportunities for collaboration, investment, and growth within Japan's rich and varied innovation landscape.



**Drive Strategic Collaborations:** Develop a vibrant international ecosystem to enhance connections and interactions between European and Japanese innovators. This effort aims to enable European startups to break into the Japanese market and form significant partnerships with local corporates and organizations.



**Build Strategic Alliances:** Focus on creating lasting, strategic partnerships that foster sustainable growth and enable European businesses to thrive in a competitive global arena.



**Global Impact:** Leverage insights from leading ecosystems to develop a globally integrated innovation strategy that overcomes broad challenges, bridging geographical and cultural divides.

# ECOSYSTEM OVERVIEW

## Unveiling Japan - A Powerhouse of Innovation for European Tech Leaders

### #Global\_Influence and Economic Might



#### **\$4.4 Trillion Economy:**

Japan's position as the **3rd largest global economy** underscores its substantial influence in the tech sector, which provides a stable and fertile ground for European tech investments.



#### **Top 10 Global Startup Ecosystem:**

Tokyo is a central economic hub and ranks 10th according to Startup Genome. This prominence illustrates its pivotal role in global innovation and its potential as a partner for European tech enterprises.<sup>1</sup>

### Sector-Specific #Investment\_and\_Opportunities



#### **\$72.4 Billion for Startup Growth:**

Targeted investments by 2028, with specific allocations of **\$734 million** for **Deep-Tech** and **\$2.2 billion** for **drug discovery**, mirror Europe's focus on innovative healthcare solutions and sustainable technologies.



#### **Next-Gen Industry Trailblazer**

**Trailblazer:** Leading in **advanced manufacturing** and **robotics**, Japan integrates AI to enhance its industrial base, aligning with Europe's strategic goals for Industry 4.0 and beyond.<sup>2</sup>

### Comprehensive #Support\_for\_Innovation



#### **\$180 Billion Annually in R&D:**

Japan's massive investment in research and development, making up about 3.5% of its GDP, places it among the top global spenders and underscores its commitment to advancing science and technology.



#### **World-Class Education System**

**(Ranked 4th Globally):** With universities like the University of Tokyo and Kyoto University, Japan provides a pipeline of highly skilled talent, crucial for fostering innovation and supporting Deep-Tech ventures.<sup>3</sup>

### #Strategic\_Engagement\_Opportunities:



#### **Corporate-Startup Ecosystem:**

Robust collaboration frameworks with giants like Toyota and Sony offer European startups pathways to integrate into mature markets and leverage established R&D infrastructures.



#### **Venture Capital Dynamics:**

The significant increase in VC funding, with **\$26 billion** invested between 2019 and 2023, signals a vibrant investment climate conducive to European stakeholders.<sup>4</sup>



## #Why\_Japan is the Ideal Partner for the European Innovator:



**Strategic Sectors Alignment:** Japan's focus on **AI, robotics,** and **sustainable technologies** offers European businesses a platform to engage in high-stakes markets with substantial growth potential.



**Regulatory and Collaborative Support:** With initiatives like the J-Startup Programme, Shibuya Startup Support, and Tokyo Innovation Base (TIB). Japan facilitates a supportive environment for foreign startups, easing market entry and fostering international partnerships.

## Regional #Centers\_of\_Innovation:



**Tokyo**

A leader in **robotics, AI,** and **life sciences,** providing substantial opportunities for collaborative R&D.



**Osaka**

Known for its **MedTech** innovations, leveraging a strong industrial heritage.



**Kyoto**

Merges rich cultural heritage with cutting-edge **GreenTech** initiatives.



**Fukuoka**

Focus on **energy** and **smart city** solutions, offering testbeds for European technologies in sustainable urban development.<sup>5</sup>



**Yokohama**

A leader in **smart city solutions and energy innovations,** offering a platform for sustainable urban development and IoT technologies.



**Sapporo**

Focuses on **cold-climate innovations and renewable energy,** offering opportunities for sustainable technology collaborations.



**Okinawa**

Focuses on **marine & environmental technologies,** with strong initiatives in ocean energy and sustainable tourism, providing opportunities for green tech partnerships.<sup>6</sup>



# INSIGHTS ON JAPANESE WORKPLACE CULTURE

## Long Working Hours & Work Style Reform



The deeply ingrained culture of long working hours and "service overtime" is being reformed through government initiatives like the 2019 Work Style Reform Act, which aims to reduce overtime and encourage flexible working arrangements such as telecommuting. Despite these reforms, traditional presenteeism remains a challenge in many sectors.

## Traditional Hierarchy & Evolving Norms



Traditional hierarchical structures and respect for seniority are prevalent, but there is a slow shift toward more egalitarian and merit-based practices, especially in startups and foreign-owned companies. This transition is influenced by increased global exposure and the integration of Western business practices.

## Lifetime Employment System Erosion



Japan's traditional "lifetime employment" system is under pressure due to economic tides and evolving worker preferences for more flexible employment options. Companies are increasingly adopting varied contract types to attract a diverse workforce.

## Adapting Communication Styles



While formal and indirect communication methods remain the norm, there's a noticeable shift towards more direct and concise communication styles, particularly among the younger workforce and in sectors influenced by international business, supported by modern communication platforms.

## Gender Roles & Diversity Initiatives



Initiatives such as Womenomics have been launched to improve female participation in the workforce; Nevertheless, Japan still faces significant challenges in gender equality, as evidenced by its ranking in the Global Gender Gap Report 2023. Efforts to enhance workplace diversity and inclusion are ongoing.

## Additional Considerations:



### Workplace Wellness

Mental health is increasingly prioritised, and initiatives to promote employee well-being are becoming more prevalent across industries.



### Digital Transformation

Rapid adoption of digital tools transforms traditional workflows, with companies prioritising technology integration to improve efficiency.



### Global Integration

As Japanese companies expand their global presence, the need to integrate international business practices through cross-cultural training has become more critical.<sup>7</sup>



# KEY INDUSTRIES

**ADVANCED  
MANUFACTURING,  
ROBOTICS,  
AI, & IOT**

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**HEALTHTECH  
& LIFE SCIENCE**

page 13

**GREENTECH  
& SUSTAINABILITY**

page 15

**ENERGY  
& ENVIRONMENT**

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## ADVANCED MANUFACTURING, ROBOTICS, AI, & IOT

Japan leads globally in advanced manufacturing, robotics, electronics, and IoT, bolstered by significant government investment in technological sovereignty and supply-chain resilience. National initiatives focus on creating advanced smart societies by seamlessly integrating digital technologies with physical infrastructure.

Leading Japanese robotics companies utilise AI, Big Data, and IIoT to power Industry 4.0, enabling smart factories, predictive maintenance, customised production, and higher efficiency, notably transforming automotive and healthcare sectors. Industry giants like Sony and Panasonic push consumer electronics and IoT innovation, significantly influencing the Industry 4.0 landscape.

Japan's robust R&D ecosystem collaborates closely with European tech hubs, ensuring interoperability and sector standardisation. Japan prioritises human-centred innovation, addressing major societal challenges such as ageing populations and sustainability through advanced, AI-driven solutions. Events like Manufacturing World and CEATEC Japan highlight Japan's technological advancements, foster global partnerships, and showcase emerging innovations such as digital twins, AR, and VR.

Japan produces about 45% of the world's industrial robots, underscoring its dominance and innovation in automation across automotive, electronics, healthcare, and logistics industries.

**Producing 45%  
of the world's industrial  
robots, Japan stands  
out as a powerhouse of  
automation and a prime  
hub for European tech  
collaboration.**

### Strategic Investment

Japan demonstrates a strong commitment to technological advancement and economic security through substantial investment in its advanced manufacturing and robotics sectors. The allocation of \$39.3 billion to enhance supply chains and bolster technological sovereignty underscores the nation's strategic focus on maintaining a competitive edge in the global technology landscape and mitigating risks associated with global supply chain disruptions. This investment also supports research and development in next-generation technologies like AI, IoT, and advanced materials.







## Leading Companies

### Robotics:

**Fanuc:** A global leader in factory automation, providing a wide range of CNC systems, robots, and ROBOMACHINES. Fanuc's robots are known for their reliability, precision, and advanced control systems, and they are widely used in the automotive, electronics, and other manufacturing industries.

**Kawasaki Robotics** A specialist in industrial robots for various applications, including welding, assembly, material handling, and painting. It is known for its expertise in developing robots for demanding environments and specialised applications.

**Yaskawa Electric:** A pioneer in motion control and robotics, offering a comprehensive portfolio of servo motors, inverters, and industrial robots. Yaskawa's solutions are widely used in industrial automation, robotics, and mechatronics.

### Electronics and IoT:

**Sony:** A multinational conglomerate known for its diverse range of electronics, gaming, entertainment, and financial services. Sony plays a significant role in developing advanced sensors, imaging technologies, and AI solutions that are crucial for IoT applications.

**Panasonic:** A leading electronics manufacturer offering various products and solutions, including consumer electronics, home appliances, automotive components, and industrial automation systems. Panasonic is developing smart home solutions, energy management systems, and IoT platforms.

**Omron:** A global leader in automation, providing sensing and control technologies, including industrial automation components, healthcare equipment, and social systems. Omron is crucial in enabling smart factories and advanced manufacturing through its innovative sensor and control technologies.



### Key Events:

Several key events showcase Japan's technological prowess and facilitate knowledge sharing and collaboration:

#### Manufacturing World:

A comprehensive trade show encompassing various manufacturing technologies, including robotics, automation, and digital manufacturing solutions.

#### The International Conference on Manufacturing and Materials Science:

A platform for researchers and industry professionals to exchange knowledge and discuss the latest manufacturing and materials science advancements.

**CEATEC Japan:** A leading exhibition showcasing cutting-edge electronics, IoT, and IT solutions, attracting industry leaders and fostering innovation in these sectors.

**IoT/M2M Expo:** Focuses specifically on IoT and machine-to-machine (M2M) technologies, providing insights into the latest trends and applications in this rapidly evolving field. These events are essential for stakeholders seeking to stay at the forefront of advanced manufacturing, robotics, AI, and IoT.







## Notable Startups

Japan's vibrant startup ecosystem contributes significantly to innovation in advanced technologies:

**Preferred Networks:** Develops advanced AI solutions for various industries, including manufacturing, automotive, and healthcare. Its expertise in deep learning and other AI techniques contributes to Europe's Industry 4.0 transformation.

**Tier IV:** Focuses on open-source autonomous driving technology, supporting European mobility innovators and contributing to developing sustainable urban mobility solutions.

**WHILL:** Designs and manufactures personal mobility devices that enhance accessibility for individuals with mobility challenges, aligning with Europe's focus on inclusive design and smart city initiatives.

**PeptiDream:** Accelerates global pharmaceutical R&D through its proprietary peptide discovery, providing valuable resources for European biotech pipelines.

**Mujin:** Develops intelligent robotic systems for warehouse automation, optimising logistics and enhancing supply chain efficiency, contributing to Europe's manufacturing and supply chain optimisation efforts.



## International Synergy

Japan actively collaborates with European tech giants such as ABB and Siemens, fostering synergistic partnerships that drive innovation and standardisation. These collaborations focus on:

**Shared engineering standards:** Promoting interoperability and compatibility between different technologies and systems.

**Joint R&D efforts and investments:** Accelerating the development of new technologies and solutions.

**Sustainable practices:** Promoting environmentally friendly manufacturing processes and technologies.

**Rapid prototyping and standardisation:** Streamlining the development and deployment of new products and solutions.





## HEALTHTECH & LIFE SCIENCES

Japan's life sciences sector is a crucial pillar of its technological advancement, driven by substantial investments in biotechnology, pharmaceuticals, and medical devices. This sector plays a vital role in addressing the challenges of an ageing population and contributing to global health. The Japanese government actively promotes innovation in this area through strategic initiatives and funding programmes. This commitment is reflected in the growth of research and development, particularly in places like regenerative medicine, digital therapeutics, and advanced medical imaging. The presence of dedicated innovation hubs and collaborative efforts with international partners further solidifies this commitment.



### Innovation Centres

**LINK-J (Life Science Innovation Network Japan):** This network is a central hub connecting academia, industry, and government to foster collaboration and accelerate innovation in the life sciences. It provides resources, networking opportunities, and incubation support for startups and established companies, promoting open innovation and knowledge sharing.

**CIC Tokyo (Cambridge Innovation Centre Tokyo):** An international innovation hub that provides a collaborative workspace and community for startups, entrepreneurs, and investors in various sectors, including life sciences. CIC Tokyo facilitates connections with global networks and provides access to resources and expertise. These centres are pivotal in accelerating innovation in BioTech, pharma, and HealthTech by providing the necessary infrastructure, resources, and networks for startups and established companies to thrive.



### Leading Companies

**Takeda Pharmaceutical Company:** A global pharmaceutical leader with a strong focus on oncology, rare diseases, gastroenterology, and neuroscience. Takeda is committed to developing innovative therapies and contributing to global health through research and development, strategic partnerships, and acquisitions. Takeda's worldwide presence and research focus make it a key player in the international pharmaceutical landscape.

**Astellas Pharma:** A pharmaceutical company focused on urology, oncology, immunology, nephrology, and neuroscience. Astellas is dedicated to developing innovative medicines that address unmet medical needs and improve patient outcomes. The company's focus on targeted therapies and personalised medicine positions it at the forefront of pharmaceutical innovation.

**Daiichi Sankyo:** A global pharmaceutical company with strengths in cardiovascular disease, oncology, and pain management. Daiichi Sankyo is actively involved in researching and developing new drugs and therapies, focusing on addressing critical medical needs.







**Fujifilm Holdings:** While known for its imaging heritage, Fujifilm has diversified into healthcare, focusing on medical imaging, diagnostics, regenerative medicine, and biopharmaceuticals. Its advanced imaging technologies and materials science expertise contribute significantly to advancements in medical diagnostics and therapies. These companies are at the forefront of pharmaceutical research and development, contributing to advancements in various therapeutic areas.

## Global Outlook

Japan actively collaborates with international partners to advance global healthcare solutions. Partnerships with European entities like Roche and Novartis drive forward research, development, and commercialisation of new therapies. These collaborations often involve joint research programmes, licensing agreements, and co-development initiatives, leveraging the strengths of each partner to accelerate innovation and address global health challenges. This international collaboration is essential for addressing global health challenges and accelerating the development of new therapies.



## Key Events

**BiolJapan Expo:** This major international event showcases the latest biotechnology, pharmaceuticals, and regenerative medicine advancements. It provides a platform for networking, partnering, and knowledge sharing among industry professionals, researchers, and investors.

**Tokyo Health Industry Show:** A comprehensive exhibition showcasing a wide range of products and services related to healthcare, including medical devices, healthcare IT solutions, and wellness products. This event provides insights into the latest trends and innovations in the broader healthcare industry. These events are critical for networking, showcasing new scientific advances, and fostering collaboration within the life sciences and healthcare sectors.<sup>8</sup>



## Notable Startups

**Heartseed:** Focuses on developing regenerative medicine therapies for heart failure, using iPSC-derived cardiomyocytes to regenerate damaged heart tissue. This aligns with Europe's strong interest in regenerative medicine and addressing cardiovascular diseases.

**CureApp:** Develops digital therapeutics (DTx) for various conditions, including hypertension, non-alcoholic steatohepatitis (NASH), and nicotine addiction. These digital solutions provide personalised treatment plans and support patients in managing their conditions, aligning with Europe's focus on digital health and preventive care.

**Cellusion:** To restore vision, develop cell-based regenerative therapies for corneal diseases using iPSC-derived corneal endothelial cells. This aligns with Europe's strong clinical trial ecosystem and focuses on innovative therapies for eye diseases.

**Spiber:** Develops Brewed Protein™ materials, a sustainable alternative to traditional materials like animal-derived collagen and synthetic fibres. This aligns with Europe's focus on sustainable materials and circular economy principles, with applications in medical devices, cosmetics, and other industries. These startups represent the dynamism of Japan's life sciences ecosystem and contribute to advancements in various therapeutic areas.





## GREENTECH & SUSTAINABILITY

Japan's commitment to sustainability and green technologies is deeply ingrained in its national strategy, driven by factors such as resource scarcity, environmental consciousness, and the need to address climate change. This commitment is reflected in substantial public and private investments in GreenTech innovations, ranging from renewable energy and energy efficiency to sustainable materials and circular economy solutions. The nation's dedication to achieving carbon neutrality, exemplified by initiatives in cities like Yokohama, demonstrates its proactive approach to tackling global environmental challenges. This commitment is further strengthened by supportive government policies, funding programmes, and a vibrant ecosystem of startups and established companies dedicated to developing and deploying sustainable technologies.



### Urban Modernisation

**Yokohama:** Stands as a leading example of urban sustainability in Japan, actively pursuing carbon neutrality through various initiatives, including smart grids, energy-efficient buildings, and sustainable transportation systems. Yokohama's efforts serve as a model for other cities in Japan and globally, demonstrating the practical implementation of sustainable urban development strategies. This leadership extends to advanced resource management practices, including waste reduction, recycling, and resource recovery.

### Investment Ecosystem

Japan's GreenTech sector benefits from a robust investment ecosystem, with significant venture capital flowing into innovative startups. Key investors include:

**SoftBank Vision Fund:** A major global investor with a strong focus on technology and innovation, including investments in GreenTech companies.

**Global Brain:** A venture capital firm specialising in early-stage investments in technology startups, including those in the GreenTech sector.

**JAFCO Group:** One of Japan's most prominent venture capital firms with a long history of investing in various sectors, including GreenTech and sustainability.

**DBJ (Development Bank of Japan):** A government-owned financial institution that provides funding and support for projects that contribute to economic development and address social challenges, including sustainability-related ones.





## Environmental Partnerships

Japan collaborates internationally to address global environmental challenges, particularly with European partners. Key events that facilitate these collaborations include:

**Smart Energy Week:** A comprehensive exhibition and conference showcasing the latest technologies and solutions in renewable energy, energy storage, and smart grid technologies.

**EcoPro:** One of Japan's most significant environmental exhibitions, showcasing various environmental technologies, products, and services. These events provide platforms for showcasing joint eco-innovations, sharing best practices, and fostering partnerships between Japanese and European organisations. These collaborations are crucial for accelerating the development and deployment of sustainable technologies on a global scale.

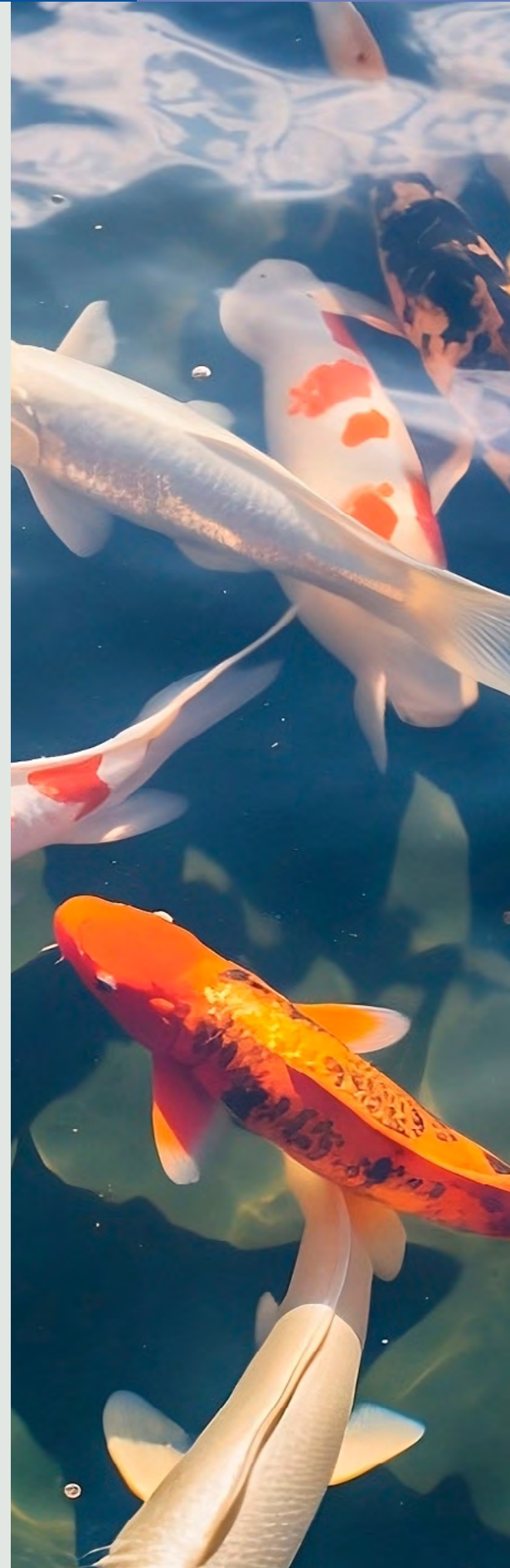


## Startups to Keep an Eye On

**Euglena:** Cultivates and utilises microalgae for various applications, including biofuel production, food supplements, and cosmetics. Euglena's focus on sustainable biofuel production aligns with Europe's carbon-neutrality goals, while its nutritional products address global nutrition challenges.

**TBM (LIMEX):** Develops LIMEX, a material made primarily from limestone, which can be used as a substitute for paper and plastic. LIMEX offers a more sustainable alternative to traditional paper and plastic products, supporting Europe's drive to reduce plastic waste and promote resource efficiency.

**JEPLAN:** Develops and implements advanced textile recycling technologies, enabling the efficient recycling of polyester and other synthetic fibres. This technology directly addresses the growing problem of textile waste and aligns with Europe's circular economy initiatives in the fashion and textile industries.





## ENERGY & ENVIRONMENT

Japan's strategic energy and environmental management initiatives are driven by a combination of factors, including energy security concerns, the need to reduce greenhouse gas emissions, and a commitment to building a sustainable society. These initiatives have positioned Japan as a global leader in renewable energy investments and the development of sustainable urban solutions. The country is actively pursuing a diverse energy mix, including solar, wind, geothermal, and hydrogen while focusing on energy efficiency and smart grid technologies. Collaborations with international partners and the emergence of innovative startups further strengthen this commitment.

### Global Standing

**Tokyo** Demonstrates strong leadership in promoting renewable energy adoption, ranking 9th globally for renewable energy investment. This reflects the city's commitment to transitioning to a low-carbon economy through various policies and initiatives, including promoting rooftop solar installations, supporting the development of renewable energy infrastructure, and implementing energy-efficient building codes. This ranking highlights Tokyo's significant contribution to global efforts in renewable energy deployment.

### Joint Initiatives

Japan actively collaborates with European energy leaders to accelerate the transition to sustainable energy systems. These partnerships include:

**Enel:** An Italian multinational energy company involved in renewable energy generation, distribution, and energy services. Collaborations with Enel may focus on joint development of renewable energy projects, smart grid technologies, and energy efficiency solutions.

**Vestas:** Vestas is a Danish wind turbine manufacturer and leading global wind energy market player. Partnerships with Vestas likely involve deploying wind energy projects in Japan and collaborating on advanced wind turbine technologies. These partnerships bolster sustainable energy projects by leveraging the expertise and resources of Japanese and European companies. These collaborations involve technology transfer, joint research and development, and co-investment in renewable energy projects.







## Notable Startups

**WOTA:** Develops decentralised, AI-driven water recycling systems that enable efficient water reuse in various settings, from individual buildings to entire communities. WOTA's innovative technology directly addresses water scarcity challenges and aligns with Europe's resource efficiency initiatives by promoting circular economy principles in water management.

**Trende:** Operates a renewable energy retail platform that facilitates the adoption of renewable energy by consumers and businesses. Trende's platform contributes to developing decentralised energy markets. It empowers consumers to choose green energy options, aligning with Europe's efforts to promote renewable energy adoption and create more competitive energy markets.

**Key Addition: Power X:** Develops large-scale battery storage systems and electric vessels to support the integration of renewable energy sources into the grid and decarbonise maritime transportation. This focus on energy storage and maritime decarbonisation aligns with Europe's efforts to develop smart grids and reduce emissions from the transportation sector.



## Key Events

**The Renewable Energy Industrial Fair is a** major international event that showcases the latest technologies and solutions in renewable energy, attracting stakeholders from around the world. This fair provides a platform for discussing energy strategies, networking, and fostering collaborations in the renewable energy sector.

**FC EXPO (International Hydrogen & Fuel Cell Expo):** This event focuses specifically on hydrogen and fuel cell technologies, showcasing the latest advancements in this promising area of clean energy.

**Smart Grid Expo:** Showcases the latest technologies and solutions in smart grids, essential for integrating renewable energy sources into the grid and improving energy efficiency. These events provide platforms for discussing energy strategies, showcasing new technologies, and fostering collaboration in the energy and environment sectors.



# KEY COLLABORATION AREAS



## Green Technology & Sustainability

### Current Strengths

Tokyo targets carbon neutrality, aligning with Europe's sustainability leadership.

### Collaboration

**Joint R&D:** Develop clean energy systems, energy storage, and circular economy models.

**Piloting & Scaling:** Test European cleantech in Tokyo's ecosystems; use Europe's policies to scale Japanese solutions.

**Talent Exchange:** Mutual fellowships enhance culturally aware sustainability innovators.



## Life Sciences & HealthTech

### Current Strengths

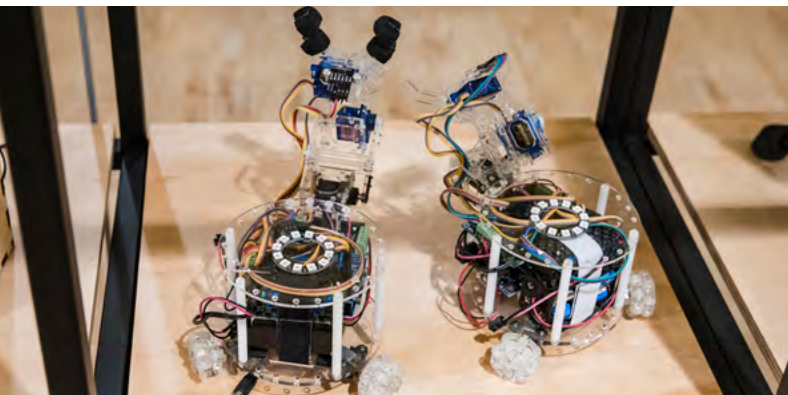
Japan excels in biotech, regenerative medicine, and diagnostics; Europe has strong biotech clusters.

### Collaboration

**Integrated R&D:** Jointly address global health challenges and accelerate clinical trials.

**Innovation Centers:** Set up joint hubs in Tokyo and Europe.

**Regulatory Alignment:** Streamline device and pharma approvals for faster market access.



## AI & Robotics

### Current Strengths

Tokyo's robotics and AI investments align with Europe's Industry 4.0 and ethical AI frameworks.

### Collaboration

**R&D Partnerships:** Co-develop robotics for manufacturing, logistics, healthcare, and eldercare.

**Ethics & Policy:** Joint forums to address AI ethics, data privacy, and responsible development.

## Strategic Benefits

1

### Market Access & Expansion

For Europeans:

**Asian Gateway:** Partner with Tokyo firms to enter high-value Asian markets, scaling globally.

**Quality & Trust:** Japan's emphasis on reliability boosts European brand credibility.

For Tokyo-based Startups:

**European Reach:** Access diverse markets, supportive regulations, and advanced R&D.

**Investment & Talent:** Attract European capital, researchers, and entrepreneurs.

2

### Innovation & Knowledge Sharing

**Cross-Pollination:** Fuse European sustainability, design thinking, and regulation with Japan's engineering and quality control.

**Shared Platforms:** Joint conferences, demo days, and accelerators spark dialogue, generate leads, and foster long-term alliances.



# HOW CAN YOU TAP INTO INNOVATION OPPORTUNITIES IN JAPAN?



## FOR ECOSYSTEM LEADERS

### Network at Strategic Events:

Participate in major Japanese tech and innovation conferences such as CEATEC (Tokyo), Slush Tokyo, and the Japan IT Week. Specialised events like the Tokyo Game Show or the New Energy and Industrial Technology Development Organization (NEDO) Forum also offer deep insights into specific tech sectors.

### Follow Influential Publications:

Subscribe to key local tech news platforms such as Nikkei Asian Review, TechCrunch Japan, and Japan Times Technology. These sources provide crucial updates on market trends, policy changes, and ecosystem dynamics.

**Engage with Local Thought Leaders:** Listen to local tech podcasts like "Disrupting Japan" or follow blogs by influencers in the Japanese tech scene to gain nuanced insights into the startup environment and consumer culture.

**Participate in EIT Global Outreach's Exploration Programmes:** Enhance your ecosystem understanding and connectivity through tailored programmes that help European leaders engage effectively with Japanese innovation hubs.



## FOR STARTUPS

### Ensure Market Compliance:

Consult resources such as METI's official website and JETRO's business guides to familiarise yourself with Japan's strict regulatory standards, especially in sectors like healthcare, fintech, and privacy.

### Attend Key Industry Conferences:

Leverage platforms like the Tokyo International Forum or the RISE Tech Conference in Tokyo to network with potential investors and partners.

**Stay Informed with Local Innovators:** Connect with local accelerators and incubators such as Samurai Incubate, 500 Startups Japan, and Plug and Play Japan to stay ahead in the competitive landscape.

**Join EIT Global Outreach's Go-to-Market Programmes:** Access support and tools to adapt your business model to the Japanese market, ensuring a smoother transition and successful entry.



## FOR CORPORATES

### Connect with Key Business Networks:

To find collaboration opportunities, engage with industry groups like Keizai Doyukai (Japan Association of Corporate Executives), the American Chamber of Commerce in Japan, or the European Business Council in Japan.

### Discover Innovative Startups:

Participate in industry-focused events such as the Japan Robot Week or Tokyo Health Industry Show, which feature cutting-edge startups and new technologies. Connect with sector-specific accelerators to find innovative solutions that align with your corporate goals.

### Stay up-to-date with Sectorial Trends

Listen to podcasts regularly, such as "Japan Startup Station," which offers insights into the startup ecosystem and features discussions with founders, investors, and other industry figures.

**Leverage EIT Global Outreach's Open Innovation Programmes:** Utilise programmes designed to connect European corporates with Japanese startups, facilitating access to innovative technologies and fostering partnerships that can drive your company's growth in the region.



**For all innovation players** looking to build successful cross-border consortia, join our online consortium-building programmes. These programmes offer matchmaking opportunities and expert consulting to create winning Horizon Europe bids.

**Are you an EIT partner?** The Global Outreach provides soft-landing programmes in leading innovation valleys, offering ecosystem overviews, insider access to talent and knowledge, and curated innovation reports. Check out our contact details below, and don't hesitate to ask for more information.

# KEY PLAYERS

## KEY INSTITUTIONS & ORGANIZATIONS



### METI (Ministry of Economy, Trade and Industry)

METI shapes Japan's innovation landscape through policy frameworks, grants, and regulatory guidance. It encourages advanced R&D, sustainable growth, and entrepreneurship while supporting foreign entrants navigating market complexities.

**For European entrepreneurs:** METI's initiatives provide European companies with easier market access and favourable conditions under Japan-EU agreements. These facilitate streamlined procedures, enhanced IP protections, and direct investment opportunities, allowing European businesses to engage effectively with Japan's technology sectors



### JETRO (Japan External Trade Organization)

With more than 120 offices worldwide, JETRO provides international players with market intelligence, sector-specific insights, and direct introductions of business partners. In addition to trade facilitating programmes, including trade missions and an online trade platform for promoting innovation, it provides the Invest Japan programme, programmes to facilitate Japanese startups' business expansion abroad, and the open innovation business platform, the J-Bridge, to help overseas firms engage effectively with Japanese stakeholders.<sup>9</sup>

**For European entrepreneurs:** JETRO can identify key partners, streamline joint ventures, support office set-up procedures and tap into a well-curated network of buyers, suppliers, and investors in Japan's vibrant innovation scene.





## Tokyo Metropolitan Government (TMG)



TMG actively fosters an environment conducive to innovation and enterprise growth. One of the flagship initiatives is the Tokyo Innovation Base (TIB), launched to serve as a central hub for startups and entrepreneurs, providing a space for networking, events, and collaborative projects to drive new technologies forward while providing free co-working spaces for anyone who wishes to use them. Additionally, TMG supports the establishment of special economic zones where cutting-edge businesses can benefit from regulatory relaxations and enhanced support services, effectively accelerating the commercialisation of innovative ideas and products. These concerted efforts are integral to TMG's strategy to solidify Tokyo's role as a leading global city for tech and innovation.

**For European entrepreneurs:** The TMG supports European and foreign companies through targeted initiatives. These include the "GX-Related Foreign Company Tokyo Market Entry Support Programme," offering subsidies and support for GreenTech companies, and the "Tech Business Camp Tokyo," an accelerator programme to integrate global innovations into the Japanese market. Both programmes provide financial support, business setup advice, and networking opportunities to help European companies thrive in Tokyo. For those visiting Tokyo, use the free co-working spaces to network with the local players and work comfortably.<sup>10</sup>



## Deloitte Japan



Deloitte Japan blends local market know-how with a global perspective. It advises on business strategy, regulatory frameworks, and cross-border deals, guiding newcomers through Japan's unique culture, consumer demands, and competitive environment.

**For European entrepreneurs:** Refine entry strategies, validate product-market fit, and identify scalable opportunities. Based on its global experience and vast worldwide presence, Deloitte's expertise can shorten deal cycles and assist in mitigating business cultural gaps.<sup>11</sup>



## CIC Japan G.K.



CIC Japan convenes startups, VCs, researchers, and corporates in a single hub. This ecosystem fosters mentorship, product validation, and resource-sharing, acting as a launchpad for scaling solutions across Asia's third-largest economy.

**For European entrepreneurs:** Secure early-stage funding, gain R&D insights and tap into pre-built networks that span robotics, AI, MedTech, and more, speeding up commercialisation and ensuring a smoother market entry.<sup>12</sup>



## Keio Innovation Initiative, Inc.



Affiliated with Keio University, this venture capital firm emphasises deep tech, biotech, and transformative R&D, facilitating the transition of innovative research into market-ready products. It leverages Keio University's strong academic foundations to bridge the gap between academia and industry, fostering a robust environment for commercialising advanced technologies.

**For European entrepreneurs:** This collaboration allows European entrepreneurs to engage with a top-tier academic ecosystem. It will enable them to co-develop next-generation technologies and explore technology transfers and spin-offs. Such partnerships integrate European design thinking with Japanese engineering precision, producing innovative solutions for global markets.<sup>13</sup>



## Plug and Play Japan

PLUGANDPLAY JAPAN

It is an integral part of a renowned global accelerator network that connects startups with corporate partners, investors, and mentors to facilitate their growth within Japan's dynamic tech ecosystem. The network offers specialised programmes across various industries, enabling startups to participate in tailor-made events like the Japan Summit to showcase their innovations and engage with potential partners and investors.

**For European entrepreneurs:** Plug and Play Japan provides valuable resources and opportunities to adapt their business models to local market preferences and regulatory standards. Participation in their programmes helps significantly shorten the time to market, offering mentorship closely aligned with local consumer and corporate needs. This access to a network of top-tier Japanese corporations is crucial for forging strategic alliances and expanding into other regions of Asia.<sup>14</sup>



## Shibuya Startup Support



SSS, facilitated by the Shibuya municipal government, provides comprehensive assistance to foreign startups aiming to establish themselves in this vibrant Tokyo district. The initiative guides navigating local regulations, securing office space, and tapping into the area's prosperous creative industries. It is pivotal in helping companies tailor their products to Shibuya's market's unique tastes and trends.

**For European entrepreneurs:** This support is incredibly beneficial for European businesses. SSS helps launching consumer tech products in a district known for its design sophistication and cultural influence. Moreover, they aid in refining user experiences, leveraging local influencers, and engaging with cultural hubs to enhance brand visibility and foster customer loyalty in Japan.<sup>15</sup>





## The University of Tokyo & The University of Tokyo Edge Capital Partners (UTEC)



The University of Tokyo, Japan's premier institution, actively enhances global research initiatives, particularly in advanced fields like quantum computing and regenerative medicine. Its strong connections to industry and government provide a dynamic platform for groundbreaking collaborations.

The University of Tokyo Edge Capital Partners (UTEC) invests in startups tackling significant challenges in healthcare, clean energy, and advanced materials. It connects these ventures with the university's extensive academic resources to stimulate growth and innovation.

**For European researchers and entrepreneurs:** The University of Tokyo and UTEC present unique opportunities for collaboration, similar to programmes like Horizon Europe. Engage in joint labs, cooperative grants, or dual-degree programmes with top-tier researchers. Co-invest with UTEC to fast-track the commercialisation of innovative technologies in Europe and Japan. Utilise the university's comprehensive academic networks for advanced R&D, accessing specialised resources that facilitate market entry into Japan and enhance solutions to address global challenges.<sup>16</sup>

# NATIONAL STRATEGIES AND REGIONAL INITIATIVES

## Strategy for Promoting Foreign Direct Investment in Japan (2021)

In 2021, Japan launched an ambitious initiative to attract foreign direct investment (FDI), targeting key sectors to bolster economic growth and technological advancement. This strategy involves proactively facilitating foreign capital into digital transformation, green energy, and advanced manufacturing.

**For European researchers and entrepreneurs:** The Japanese government provides attractive co-funding opportunities and seeks alignment with European investment interests. By investing in Japan, European entities can engage directly with Japan's innovation landscape in electric vehicles, battery technology, and renewable energy sectors. Strategic investments will benefit from incentives such as tax breaks and streamlined regulatory processes, enhancing market entry and integration into Japan's supply chains.<sup>17</sup>

## Japan's Integrated Innovation Strategy (2022)

This strategy represents a proactive approach to securing leadership in global technology and innovation. The decision to allocate 120 trillion yen (approximately 850 billion Euros) toward R&D reflects Japan's intent to drive significant advancements in key fields like AI, robotics, biotech, and clean energy. This strategic investment is designed to propel Japan's economy forward by fostering innovation, addressing critical global challenges such as climate change and healthcare, and maintaining a competitive advantage in the rapidly evolving technological landscape.

**For European researchers and entrepreneurs:** European stakeholders can tap into co-funding opportunities to align with Japan's strategic R&D areas, particularly in fields where the EU holds strengths like Deep Tech and GreenTech. This collaboration promises streamlined regulatory pathways and integrated supply chains, enhancing the potential for joint success in pioneering technology sectors.<sup>18</sup>





## Japan Startup Development Five-year Strategy (2022)

Japan's Five-Year Startup Development Strategy aims to catalyse the creation of 100,000 startups and 100 unicorns by 2027, focusing on deep tech, digital transformation, and sustainability. The plan includes boosting investment to ~70 billion Euros, with substantial funds earmarked for deep tech and drug discovery sectors. Initiatives such as expanded mentoring, a new "Global Startup Campus," and enhanced funding mechanisms are designed to solidify Japan's position as a top startup hub in Asia.

**For European entrepreneurs:** This strategy offers numerous collaboration opportunities in AI, robotics, and green technologies, facilitating access to new funding pools and strategic partnerships. These efforts are supported by regulatory enhancements, including startup visas and tax incentives, making it easier for European enterprises to engage with Japan's vibrant ecosystem and gain a foothold in Asian markets.<sup>19</sup>

## J-Startup Programme



A collaborative initiative led by Japan's Ministry of Economy, Trade and Industry (METI) and the Japan External Trade Organization (JETRO), focuses on nurturing high-potential Japanese startups. It provides comprehensive mentorship, promotes international visibility, and facilitates introductions to foreign investors and strategic partners. The programme actively showcases these startups at major global events, helping them to secure funding and expand their market reach.

**For European investors:** J-Startup Programme offers European venture capitalists and accelerators a strategic advantage through early co-investment opportunities in emerging Japanese technologies. European businesses can leverage innovative Japanese technologies and business models by integrating these startups into their supply chains. Additionally, European entrepreneurs can benefit from reciprocal introductions, facilitating their entry into the Japanese market and participating in joint promotional activities. This collaboration opens doors to advanced technologies and enhances their competitive edge in both markets.<sup>20</sup>

## J-Bridge



Initiative by the Japan External Trade Organization (JETRO) to connect Japanese and international businesses. The programme facilitates collaborations across borders by helping companies find technological and business innovation partners. J-Bridge supports these partnerships through matchmaking events and seminars and provides detailed information on potential business and technological synergies. It emphasises strengthening ties in IT, healthcare, and environmental technologies.

**For European Companies & Entrepreneurs:** European companies can leverage J-Bridge to connect with advanced Japanese firms, gaining access to cutting-edge technologies and innovative business practices. This initiative benefits firms looking to expand their technological capabilities or explore new business models. Participation in J-Bridge can enhance market strategies through cross-border collaborations, giving European businesses a competitive edge in local and global markets. By utilising J-Bridge's resources, European firms can facilitate smoother entry into the Japanese market and foster long-term partnerships that drive mutual growth and innovation.<sup>21</sup>

## Invest Japan



Facilitated by JETRO, the Invest Japan Programme provides tailored support to foreign companies aiming to establish or expand their business in Japan. This comprehensive service offers guidance on legal procedures, tax systems, and essential business practices, simplifying the setup process in Japan's complex market landscape.

**For European Companies & Entrepreneurs:** The Invest Japan Programme offers key advantages aligned with the needs of companies from the EU market, where regulatory environments, business practices, and market structures differ significantly from Japan. This programme provides practical entry support and insights into aligning products and services with Japanese standards, which can be quite distinct from European norms. It addresses common hurdles, such as the need for product localisation due to Japan's stringent quality controls and unique consumer preferences, which often require adjustments to meet local market demands. Additionally, European companies benefit from guidance on navigating Japan's complex legal landscape, which can significantly differ from the EU's unified regulatory framework, thus easing the compliance burden and expediting market entry.





## Invest Tokyo

The programme, administered by the Tokyo Metropolitan Government (TMG), provides comprehensive support to foreign companies aiming to establish or expand their operations in Tokyo. This initiative facilitates the business setup through various services, including financial subsidies, professional consultations, and office space provision. It targets companies that can contribute to Tokyo's strategic industries and innovation ecosystem.

**For European Companies and Entrepreneurs:** The Invest Tokyo programme offers a unique opportunity for European companies by providing tailored support that addresses the common challenges foreign businesses face in the Japanese market. This includes navigating Japan's complex regulatory environment and understanding local business practices, which can significantly differ from those in Europe. The programme's resources help European firms to quickly adapt their operations to regional demands, access government and industry networks, and reduce the initial financial burden through subsidies. This support is crucial for European businesses looking to gain a foothold in Tokyo's competitive market, offering them a smoother transition and a stronger start in Asia's leading tech hub.

## Tokyo's Startup Strategy: "Global Innovation with Startups"

Tokyo aims to rejuvenate its economic landscape by nurturing a vibrant startup ecosystem. In a significant shift, the Tokyo Metropolitan Government (TMG) has launched a comprehensive strategy to transform Tokyo into the world's most startup-friendly city. This strategy is driven by an ambitious goal to increase the number of startups tenfold, foster 100 global unicorn companies from Tokyo, and multiply public-private collaborative projects by the same factor.

**For European innovators:** Tokyo's strategic initiative fosters an optimal environment for high-tech enterprises, mainly European startups specialising in AI, biotech, and cleantech. The Tokyo Metropolitan Government (TMG) aims to be the "first customer" for startups, enhancing opportunities in public procurement and easing regulations to attract top talent. This approach provides European entrepreneurs with significant investment opportunities, robust support measures, and strategic market entry points. Facilities like the "Tokyo Innovation Base" offer platforms for launching and scaling businesses, ensuring access to a network of venture capitalists and global markets. This positions Tokyo as a crucial gateway for European companies aiming to expand globally while leveraging Japan's technological advancements and regulatory environment.<sup>22</sup>

## Startup City Project - Local Government Initiatives

The J-Startup City initiative, overseen by the Japanese government, aims to foster robust startup ecosystems in designated cities across Japan. These cities, such as Tokyo, Osaka, and Fukuoka, are equipped with tailored resources and support systems to spur startup growth and innovation. The programme promotes local startups and facilitates connections with global investors and businesses, positioning itself as a gateway for international collaboration.

**For European Entrepreneurs & Startups:** This initiative offers a bridge to Japan's dynamic tech landscape. Cities like Munich, known for BioTech and sustainability, parallel Osaka's industrial and MedTech focus. With their vibrant tech scenes, Paris, Amsterdam, and Barcelona mirror Tokyo's global tech leadership, while London's financial tech innovations align with Yokohama's smart city projects. Additionally, Eastern European tech hubs like Warsaw, which is rapidly growing in tech and entrepreneurship, can find similarities with Kyoto's growing deep-tech and cultural fusion. Engaging with Japan's designated startup cities allows European businesses to access tailored resources, regulatory insights, and an international network of innovation hubs, fostering a global exchange of ideas and technologies to enhance growth and innovation in European and Japanese ecosystems.<sup>23</sup>

## SusHi Tech Tokyo

Asia's most significant innovation conference convenes over 600,000 participants annually. It tackles pressing urban challenges across mobility, health, energy, and sustainability, providing a grand stage for groundbreaking ideas and technologies. The 2024 conference highlighted the increasing integration of smart technologies into urban infrastructure and featured influential innovators and thinkers from across the globe.

**For European Innovators:** SusHi Tech Tokyo offers a unique platform to showcase urban tech solutions, interact directly with policymakers, and explore collaborative pilot projects with Japanese municipalities. Participants can extend their network into broader Asian markets through cross-border partnerships. As we look forward to the 2025 conference, slated for early May (8-10), we anticipate a deepened focus on cutting-edge topics such as AI-driven environmental management and smart city logistics. This event promises to be a pivotal opportunity for European innovators to demonstrate their technologies and forge strategic alliances, ensuring their presence at the forefront of Asia's urban innovation landscape. Participation in SusHi Tech Tokyo 2025 is an excellent chance to influence future urban development trends and connect with potential business partners across Asia.<sup>24</sup>

### To summarise,

engaging with Japan's broad innovation ecosystem—from government agencies and venture capital hubs to universities, accelerators, and city-level initiatives—equips European stakeholders with strategic partners, funding avenues, and real-world testbeds. Guided by massive R&D investments, ambitious startup targets, and global industry events, European entities can refine products, secure strategic alliances, and accelerate go-to-market strategies. Japan's dynamic tech ecosystem offers a launchpad for sustainable, cross-continental growth, shaping the global technology landscape through joint innovation and long-term collaborations.





# SŌGŌ SHŌSHA: JAPAN'S GLOBAL TRADING TITANS

Japanese sōgō shōsha (総合商社, general trading companies) operate across multiple industries—energy, infrastructure, manufacturing, and technology—using vast networks and market intelligence to streamline international trade, supply chains, and partnerships. They offer European tech ventures efficient market entry, supply chain integration, and brand credibility, accelerating growth and long-term success in Asia.

## STRATEGIC ADVANTAGES FOR EUROPEAN TECH PLAYERS

Overcome market-entry barriers with seasoned guidance and distribution channels.



Access cross-sector introductions, local partners, and reliable supply chains.



Leverage established brand credibility and industry influence.



Align with trusted firms to scale, adapt products, and seize emerging opportunities.<sup>25</sup>



# Big-5 Sōgō shōsha

## Mitsubishi Corporation



🎯 **Focus:** Energy, automotive, chemicals, machinery, digital, sustainable infrastructure, mobility.

🌐 **Global Reach:** 90+ countries, strong commodity sourcing, industrial investments.

☆ **For European Innovators:** Ideal for clean energy, automotive tech, advanced materials, and digital solutions. Mitsubishi's networks and reputation enhance adoption, scale, and alignment with evolving sustainability goals.<sup>26</sup>

**Number of employees:** 80,037

**Network:** 11 offices in Japan, 105 overseas

**Number of Consolidated Companies:** 1220

**Revenue (2023):** \$141.17 Billion

## Mitsui & Co.



🎯 **Focus:** Energy, metals, chemicals, machinery, food, healthcare, mobility, smart cities.

🌐 **Global Reach:** 60+ countries, expertise in resource management and digital infrastructure.

☆ **For European Innovators:** Mitsui's balanced portfolio and local production hubs simplify regulatory navigation. It ensures products find the right partners, customers, and routes to long-term commercial success.<sup>27</sup>

**Number of employees:** 53,602

**Network:** 11 offices in Japan, 115 overseas

**Number of Consolidated Companies:** 491

**Revenue (2023):** \$107.7 billion

## ITOCHU Corporation



🎯 **Focus:** Consumer goods, ICT, machinery, energy, shifting toward digital platforms, e-commerce, and retail innovation.

🌐 **Global Reach:** 60+ countries with layered distribution and marketing capabilities.

☆ **For European Innovators:** ITOCHU's retail networks and operational know-how help tailor offerings to Japanese consumers. Its venture arm adds capital, strategic guidance, and cultural insights.<sup>28</sup>

**Number of employees:** 113,733

**Network:** 7 offices in Japan, 87 Overseas

**Number of Consolidated Companies:** 1220

**Revenue (2023):** \$105 billion

## Sumitomo Corporation



🎯 **Focus:** Transportation, infrastructure, sustainable energy, digital services, leveraging industrial heritage.

🌐 **Global Reach:** 65+ countries, expertise in large-scale project management and procurement.

☆ **For European Innovators:** Perfect for cleantech, mobility, and advanced manufacturing startups seeking large projects, reliable supply chains, and smooth adaptation to local regulations.<sup>29</sup>

**Number of employees:** 81,288

**Network:** 20 offices in Japan, 105 overseas

**Number of Consolidated Companies:** 893

**Revenue (2023):** \$51.32 billion

## Marubeni Corporation



🎯 **Focus:** Energy, agriculture, food, power, transportation, finance, chemicals, renewable energy and smart agriculture.

🌐 **Global Reach:** 60+ countries, blending commodity expertise with emerging solutions.

☆ **For European Innovators:** Ideal for AgTech, renewable energy, industrial IoT, and supply chain optimisation. Marubeni's operational know-how, pilot projects, and joint ventures streamline commercial readiness and expansion into Japan & Asia.<sup>30</sup>

**Number of employees:** 50,200

**Network:** 13 offices in Japan, 117 overseas

**Number of Consolidated Companies:** 490

**Revenue (2023):** \$68.9 billion



# THE TOP 5 VENTURE CAPITAL FIRMS IN JAPAN *For the European Entrepreneur*<sup>31</sup>

1

## SoftBank Vision Fund

**Portfolio:** 300+ companies

- 📍 **Location:** Tokyo
- 🎯 **Focus:** AI, robotics, FinTech, BioTech
- 🏆 **Notable Investments:** Uber, WeWork, ByteDance
- 📖 **Overview:** One of the world's most significant tech-focused funds, offering substantial capital, global networks, and brand elevation. Ideal for European startups seeking transformative growth and rapid market entry in Asia.

## Global Brain

**Portfolio:** 400+ companies

- 📍 **Location:** Tokyo
- 🎯 **Focus:** AI, IoT, robotics, BioTech, FinTech
- 🏆 **Notable Investments:** Mercari, SmartHR, Spiber
- 📖 **Overview:** Provides early to growth-stage funding, hands-on support, and corporate introductions. Helps European innovators localise offerings, access specialised segments, and forge strategic ties with Japanese corporates.

2

## JAFCO

**Portfolio:** 300+ companies

- 📍 **Location:** Tokyo
- 🎯 **Focus:** IT, Healthcare, digital transformation
- 🏆 **Notable Investments:** Sansan, Freee, JINS
- 📖 **Overview:** A veteran VC with flexible investment stages and mentorship. Assists European startups in healthcare or enterprise software to navigate regulations, understand consumers, and sustain growth.

3

## World Innovation Lab (WiL)

**Portfolio:** 140+ companies

- 📍 **Locations:** Tokyo & Palo Alto
- 🎯 **Focus:** Enterprise, SaaS, FinTech, HealthTech, InsurTech, automation
- 🏆 **Notable Investments:** Mercari, Wise, Doctor On Demand
- 📖 **Overview:** Connects Silicon Valley innovation with Japan. Strong for European scale-ups aiming for cross-border expansion, growth capital, and strategic guidance.

4

## Scrum Ventures

**Portfolio:** 100+ companies

- 📍 **Locations:** Tokyo & San Francisco
- 🎯 **Focus:** Consumer, enterprise, healthcare, transportation, SaaS, IoT, FinTech
- 🏆 **Notable Investments:** Chariot, Origin, Kidaptive
- 📖 **Overview:** Seed and Series A investor with dual-market presence. Supports European startups with diverse funding pools, pilot customers, and exposure to multiple markets simultaneously.

5

# EXISTING EU-JAPAN BUSINESS OR TECH AFFILIATED

## Frameworks & Agreements



### 1. EU-Japan Economic Partnership Agreement (EPA)

**i Details:** Since 2019, this agreement has reduced tariffs, simplified regulations, and improved overall market access for European and Japanese companies. It creates more precise standards and lowers trade barriers for tech products, fostering a more predictable business environment.

**globe Impact:** European startups and scale-ups can more easily enter Japan's market, access advanced components, and establish supply-chain collaborations. By smoothing regulatory processes and encouraging joint ventures, the EPA helps European firms quickly expand their Asian footprint.<sup>32</sup>

### 2. Scientific & Technological Cooperation between the EU and Japan

**i Details:** This agreement strengthens R&D ties between European and Japanese research institutions, startups, and corporates. It targets

emerging technologies—such as AI, semiconductors, quantum computing, and green energy solutions—and works with EU funding instruments like Horizon Europe.

**globe Impact:** European innovators gain access to Japan's cutting-edge labs, talent pools, and specialised facilities. Joint R&D projects, pilot testing, and faster product development have become more feasible, especially in areas like advanced materials, digital health, and sustainable mobility, where both regions excel.<sup>33</sup>

### 3. EU-Japan Digital Partnership

**i Details:** Introduced in 2022, this partnership focuses on digital transformation, cybersecurity, data governance, and next-generation connectivity (5G, 6G, IoT). It encourages standard-setting and best-practice sharing to enhance interoperability and technological leadership.

**globe Impact:** European digital startups can align their services with Japan's infrastructure, test new solutions in

a data-rich environment, and gain visibility in Asia. With harmonised standards and improved market confidence, European digital solutions have a more straightforward path to broader regional adoption.<sup>34</sup>

### 4. Green Alliance between the EU and Japan

**i Details:** This alliance supports joint efforts on decarbonisation, renewable energy, circular economy models, and sustainable technologies. It provides a structured framework for policy alignment, co-investment in green projects, and collaborative demonstrations of innovative climate solutions.

**globe Impact:** European cleantech startups find receptive markets and cooperative partners in Japan to pilot energy-efficient technologies, accelerate regulatory approvals, and refine business models on a global scale. Engaging in joint projects helps both ecosystems advance their climate goals and share sustainability best practices.<sup>35</sup>

For European tech innovators, EU-Japan frameworks such as the Economic Partnership Agreement, Science and Technology Agreement, Digital Partnership, Green Alliance, and startup programmes (J-Startup, Invest Tokyo) offer smoother entry into one of the world's top innovation markets. These initiatives provide better access to capital, talent, and R&D while giving Tokyo-based players a route into Europe's diverse ecosystems.

Negotiations on deeper Japanese involvement in Horizon Europe pave the way for greater collaboration on R&D projects and co-funding opportunities. Although not entirely associated yet, Japan's growing participation—supported by the EU-Japan Centre for Industrial Cooperation—promises more co-innovation, faster market entry, and broader scaling of solutions to global challenges. As cooperation under Horizon Europe matures, both ecosystems stand to gain from more competitive, impactful partnerships.





# KEY EUROPEAN ORGANISATIONS IN JAPAN *Supporting European Entrepreneurs*

## THE DELEGATION OF THE EUROPEAN UNION TO JAPAN

**The EU Delegation to Japan plays a pivotal role in fostering innovation and business relations, acting as a bridge for European innovators aiming to enter the Japanese market. Here's how they support this process:**

### **Facilitating Networking and Partnerships:**

The EU Delegation connects European businesses with Japanese counterparts through networking events and business matchmaking, facilitating collaboration, market entry, and expansion.

### **Providing Market Intelligence and Advisory**

**Services:** The delegation provides crucial insights into market trends, regulatory changes, and sector-specific opportunities, helping European companies tailor their strategies for the Japanese market.

**Supporting Trade and Investment:** They identify investment opportunities and facilitate market entry in collaboration with entities like JETRO (Japan External Trade Organization).

**Advocacy and Regulatory Support:** The delegation advocates for European businesses, addressing trade barriers and assisting in compliance with Japanese

regulations, ensuring European standards are maintained.

**Organising Workshops and Seminars:** The EU Delegation equips European companies with essential skills through workshops and seminars that cover Japanese business culture, legal issues, and industry-specific insights.

## Relevant Positions

**Science and Technology Advisers:** Support innovation and R&D-focused tech companies and startups.

**Trade and Economic Advisers:** Provide insights into economic trends and market conditions.

**Commercial Attachés:** Aid in fostering trade relations and navigating the local business environment.<sup>36</sup>

### **Contact Information:**

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## EU-JAPAN CENTRE FOR INDUSTRIAL COOPERATION

The EU-Japan Centre for Industrial Cooperation, jointly established by the European Commission and the Japanese Government, is pivotal in enhancing industrial and economic ties between the EU and Japan. As a dynamic facilitator, it supports innovation exchanges, research collaborations, and aligns with Horizon Europe as Japan's National Contact Point.

**Team Europe Coordination:** Collaborates with Member States' trade promotion organizations to synchronize European activities.

**Comprehensive Training Programmes:** Offers "Get Ready for Japan," market access workshops, and Vulcanus internships, providing key insights into the Japanese market.

**Business Support Services:** Delivers targeted support including helpdesks and "Step in Japan" assistance to help European businesses understand market and regulatory frameworks.

**Networking and Partnership Promotion:** Organizes matchmaking events and sector-specific meetings to connect European innovators with Japanese partners.

**Advanced Research and Development Cooperation:** Facilitates joint research and technology cooperation, enhancing EU-Japan innovation links.

**Advocacy and Policy Engagement:** Advocates for favorable trade conditions and assists European companies in navigating the Japanese business environment.

These services significantly boost the growth and market penetration of European companies in Japan, making the Centre an essential resource for expanding into this major market.<sup>37</sup>

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## EUROPEAN INVESTMENT BANK (EIB)

The European Investment Bank (EIB), the EU's financial institution, operates globally to further the EU's policy goals. Although it lacks a physical presence in Japan, the EIB has forged strategic partnerships with key Japanese financial entities to support mutual and global development objectives.

### European Investment Bank's Collaboration with Japanese Entities

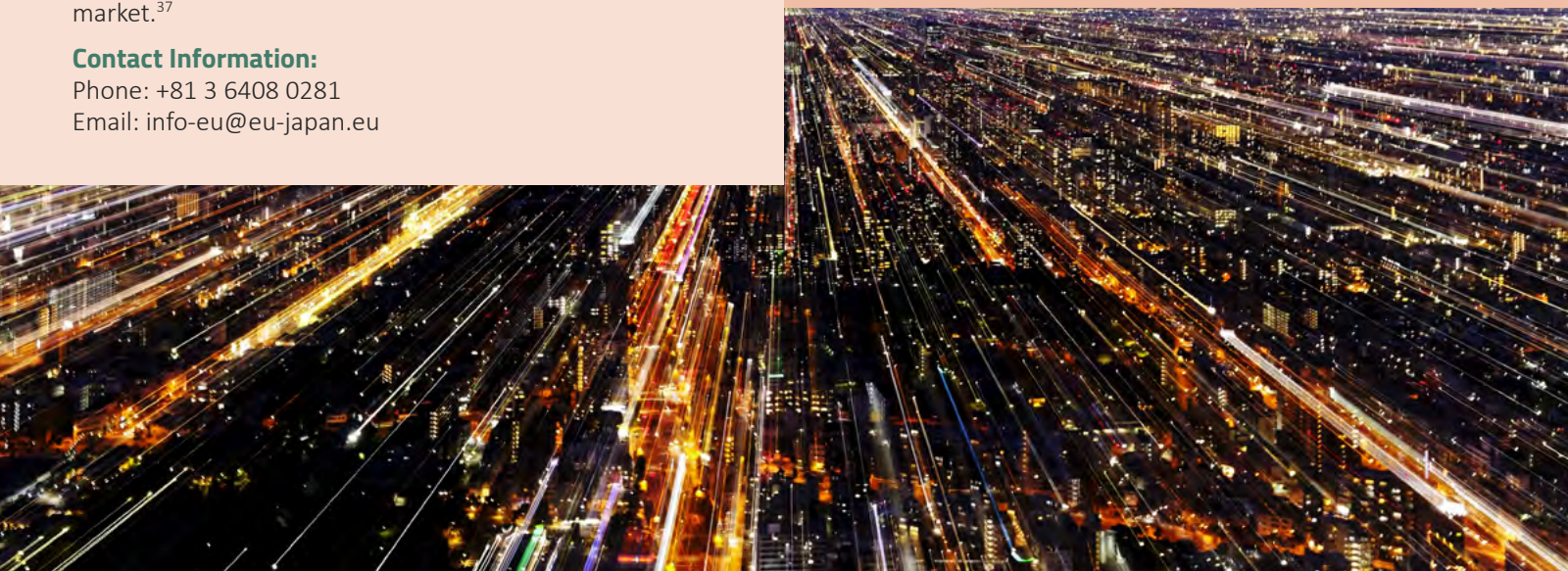
**Strategic Agreements:** The EIB has signed Memorandums of Understanding (MOUs) with prominent Japanese financial agencies like the Japan Bank for International Cooperation (JBIC) and the Japan International Cooperation Agency (JICA).

**Purpose of Agreements:** These agreements aim to promote sustainable development, environmental protection, and infrastructure enhancements globally.

**Scope of Collaboration:** These partnerships enable joint financing of projects, sharing of expertise, and investment in critical areas such as climate action, public health, and innovation.

### Opportunities for European Entrepreneurs:

Collaborations with JBIC and JICA open doors for European entrepreneurs to access extensive networks and financial resources, supporting their entry into markets influenced by these Japanese entities. This includes participation in joint projects with substantial development funding and expertise, particularly in sustainability and infrastructure sectors.<sup>38</sup>





# THE LEADING TECH-CITIES ECOSYSTEMS

## Japan's City-Based Tech Ecosystems: Tailored Opportunities for European Innovators

Japan's tech landscape offers European startups, scale-ups, investors, and researchers diverse entry points into Asia. From Tokyo's global scale to Kyoto's sustainability, Osaka's industrial backbone, Fukuoka's supportive environment, Yokohama's green focus, and Gunma's manufacturing excellence—each city provides unique advantages for European innovators.



## Tokyo Asia's Mega-Hub

Tokyo is a global economic powerhouse and a leading hub for technology and innovation, driven by strong government initiatives, significant venture capital investments, and a thriving startup culture. As the financial and business center of Japan, the city is home to a diverse range of industries, including advanced manufacturing, robotics, fintech, and life sciences. With ambitious plans to foster 100,000 startups, including 100 unicorns, Tokyo is positioning itself as a major player in the global tech economy. The Tokyo Metropolitan Government actively supports this vision through initiatives like the Tokyo Innovation Base and the Tokyo Venture Capital Hub, creating a dynamic ecosystem for entrepreneurs and investors alike. With a strong talent pool, world-class infrastructure, and increasing international collaboration, Tokyo continues to strengthen its role as a global leader in innovation and economic growth (the reference number should be here in the end).

### Highlights

**Market of 35+ million consumers**

**1# Global ecosystem in knowledge**

**AI, Life Science (mainly BioTech), IoT, Robotics, and FinTech global leader**

### Why Tokyo?

**A gateway to the Asian market**

**\$26B in VC funding between 2019-2023**

**Top global events (Tokyo Consortium, Innovation Base, SusHi Tech Tokyo)**

**High-quality talent from leading universities**

### Opportunities

**Refine and scale solutions in a demanding market**

**Access strategic funding and mentorship (Invest Tokyo programme)**

**Form global R&D partnerships<sup>39</sup>**

**Global Rankings:**

*StartupBlink:*  
**#14**

*Startup Genome:*  
**#10**



# Yokohama *The Green Gateway*

Yokohama, Japan's second-largest city, is emerging as a vibrant startup ecosystem. The city hosts approximately 230 startups, including notable companies like Loglass, Aperza, and stand.fm. Yokohama's innovative environment is further supported by accelerators such as LIP. Yokohama, which fosters advancements in health and medical fields. Additionally, the city has secured the top position in the Best Cities Ranking for five consecutive years (2018-2022) within the Kanto Region, encompassing Tokyo, Kanagawa, Chiba, Ibaraki, and Saitama.

## Highlights

**Near Tokyo (~50 km)**

**Carbon neutrality by 2050**

**Global events: YOXO Festival, Y-SHIP Convention**

## Why Yokohama?

**Startup Visa for easier market entry**

**GreenTech-friendly environment**

## Opportunities

**Pilot sustainable solutions**

**Quickly build networks via specialised initiatives<sup>40</sup>**



# Kyoto *Sustainability & CultureTech*

Kyoto, known for its rich cultural heritage, is emerging as a significant player in Japan's startup ecosystem. Ranked third nationally, the city is home to almost 200 startups, accounting for about 6% of Japan's total. Notable startups such as ExaWizards and Atmoph are leading innovations in artificial intelligence and consumer electronics. The city's blend of tradition and innovation, coupled with initiatives like the Startup Visa program, positions Kyoto as an attractive destination for entrepreneurs worldwide.

## Highlights

**Top-tier academia (Kyoto University)**

**CultureTech, GreenTech, MedTech, EdTech**

## Why Kyoto?

**Blend of tradition and eco-innovation**

**Growing Green and CulturalTech investments**

## Opportunities

**Stand out in a niche ecosystem**

**Forge R&D ties merging European design with Kyoto's sustainability<sup>41</sup>**

**Global Rankings:**  
StartupBlink:  
**#169**





# Osaka Industrial & MedTech Strength

Osaka stands as Japan's second most prominent startup ecosystem. The city is home to over 111 startups, with notable companies such as Direct Marketing MiX, MIRAIRO, and LBB leading the way. Osaka's startup landscape is particularly strong in the Hardware & IoT sector, where it ranks 42nd globally. The top three Hardware & IoT startups in Osaka have collectively raised more than USD 15.8 million. This dynamic environment underscores Osaka's growing significance as a hub for technological innovation and entrepreneurial activity in Japan.

## Highlights

**Industrial heritage, MedTech, IndustrialTech**

**Major corporates, innovation hubs, tax-friendly zones**

## Why Osaka?

**Ideal for robotics, IoT, and advanced healthcare solutions**

**Strong corporate partnerships**

## Opportunities

**Integrate with supply chains**

**Rapid prototyping and validation through local hubs<sup>42</sup>**

**Global Rankings:**  
StartupBlink:  
**#143**



# Fukuoka High-Growth Support

Fukuoka is establishing itself as a significant tech and startup hub in Japan. The city has fostered a supportive environment for startups, notably through initiatives like "Fukuoka Growth Next." This has helped create a vibrant ecosystem that attracts entrepreneurs and tech companies. Fukuoka's strategic geographic location and proactive policies contribute to its growing economic landscape, particularly in sectors like information technology. The city is working to create a balance between economic growth and high quality of living.

## Highlights

**Japan's 4th city, affordable costs, Energy & Environment focus (2nd in East Asia)**

**Startup Visa, Fukuoka Growth Next, Ascension Event**

## Why Fukuoka?

**Welcoming ecosystem for foreign entrants**

**Diverse industries (from environment to software)**

## Opportunities

**Launch cost-effectively**

**Form alliances with investors, academia, corporates<sup>43</sup>**

**Global Rankings:**  
StartupBlink:  
**#242**





# Spotlight on Gunma

## Japan's Specialized Manufacturing Hub

### Location & Industry

#### Proximity to Tokyo:

Approximately 100 km, with quick access via bullet train.

#### Core Industries:

Automotive, Electrical Equipment, and Advanced Manufacturing.

#### Tax Incentives & Support:

Strong support from academia-industry clusters around Gunma University.

### Why Gunma?

**R&D Excellence:** Leveraging Gunma University's research for robotics and advanced manufacturing innovations.

**Industrial Specialization:** Notable for advanced manufacturing with extensive collaboration through 31 innovation hubs, including NETSUGEN.

#### Economic and Startup Ecosystem:

Home to over 200 startups with a rich industrial innovation tradition since 2021.

**Manufacturing Excellence:** Comparable to global leaders, notably in automotive production akin to Aichi Prefecture.

#### Regional Strengths and Resources:

**Food Industry Hub:** Key location for top food manufacturers supported by superb resources and transport links.

**Agriculture and Renewable Energy:** Utilizes local resources efficiently, with significant developments in hydropower.

#### Key Opportunities for European Tech Stakeholders:

**Industry 4.0 & Beyond Development:** Provides a testbed for cutting-edge industrial solutions.

**Stable Partnerships:** Extensive network of 85,000 corporates for long-term collaboration.

**Sector-Specific Growth:** Notably automotive, with SUBARU's main plant producing 60% of its output here; significant in food manufacturing.





# MUST-KNOW TIPS

## *for the European Innovator to Penetrate Japan's Tech Ecosystem*

### **1. Understand Business Etiquette**

Japan values formal business practices: One must always show respect, be punctual and dress appropriately. Be aware of the importance of exchanging business cards (名刺, meishi) with both hands and taking time to read them as a sign of respect.

### **2. Customise Your Approach**

Adapt your products and services to fit the Japanese market's specific needs. This might involve adapting to local regulations, language requirements, and cultural nuances which influence consumer behaviour.

### **3. Build Strong Relationships** (信頼, shinrai)

Trust and personal relationships are crucial in Japanese business culture. Invest time in face-to-face meetings and nurture long-term relationships rather than expecting quick deals.

### **4. Localise Communications**

Local language and contextual understanding are key. Ensure all your business materials are available in Japanese, and consider cultural nuances in your marketing and communications strategy.

### **5. Navigate the Funding Landscape**

Japanese investors often prefer conservative, long-term investments and may require more detailed business plans and demonstrations of stability than European investors. Understanding these expectations can help you pitch more effectively.

### **6. Leverage Local Partnerships**

Partner with local businesses to gain insights and access to the market. This can also help navigate legal and bureaucratic hurdles with the benefit of local expertise.

### **7. Participate in Industry Specific Clusters**

Engage with local tech hubs and clusters specific to your industry. Japan has several world-leading clusters in sectors such as automotive, robotics, electronics, and biotechnology.

### **8. Understand the Regulatory Environment:**

Compliance with Japanese regulations is non-negotiable. Regulatory frameworks can be stringent, and it is crucial to understand and adhere to them to avoid penalties and build trust.

### **9. Emphasise Quality & Precision**

The Japanese market values high-quality products that are reliable and precise. Ensure your product meets these standards and consider obtaining local certifications if necessary.

### **10. Utilise Governmental Programmes**

The Japanese government offers various programmes and incentives to support innovation and technology transfer, which can significantly support foreign companies looking to establish a presence in Japan.

### **Bonus Tip:** **Stay Persistent & Patient**

Market entry into Japan often requires persistence and patience. Decisions might take longer, and initial slow progress doesn't necessarily indicate disinterest. Maintain a respectful, steadfast approach to eventually achieving success.

*'For European tech stakeholders, Japan represents more than just a market; it's a platform for pioneering innovation, sustainable development, and global expansion.'*

## SUMMARY – LOOKING AHEAD: *Future Prospects & Key Areas for Collaboration*

Europe aims to diversify its markets, tap into specialised R&D, and foster impactful innovation. Japan, particularly in the Greater Tokyo Area, is a strategic gateway to Asian markets, offering a blend of Deep Tech expertise in AI, robotics, GreenTech, FinTech, and life sciences. This aligns well with Europe's focus on innovation-driven growth and sustainability. Tokyo's strong government backing, robust infrastructure, and vibrant innovation hubs create a fertile environment for European entities to pilot projects, forge strategic investments, and refine technologies. This setting meets high-quality standards and provides access to future-focused solutions and reliable local partnerships.

The Japanese startup ecosystem is poised for exponential growth, supported by significant investments in technology and deep tech sectors and expanding international partnerships. By overcoming cultural and regulatory challenges, Japan can enhance its

position as a global tech leader, offering unique opportunities for collaboration with European ecosystems.

For European tech stakeholders, Japan represents more than just a market; it's a platform for pioneering innovation, sustainable development, and global expansion. Engaging with Japan's deep tech expertise and stable business environment enables Europeans to validate their offerings, secure competitive advantages, and collaboratively shape the future of global innovation. Cities like Tokyo, Kyoto, Osaka, Fukuoka, Yokohama, and Prefecture like Gunma each offer unique benefits—from Tokyo's global reach and Kyoto's green niche to Osaka's industrial prowess, Fukuoka's affordability, Yokohama's sustainability focus, and Gunma's manufacturing edge. Tailored visa programmes, R&D subsidies, and networking hubs simplify market integration, while joint ventures, R&D collaborations, and pilot projects enable sustainable global growth.

This enriched perspective underscores Japan's strategic role in the global tech landscape. It highlights the symbiotic opportunities for collaboration with European ecosystems, leveraging each city's distinct advantages to foster joint ventures and sustainable innovations.<sup>44</sup>

### Don't miss out on any global opportunities



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