EU-Japan Centre
for Industrial Cooperation
日欧産業協力センター

ICT sector and Japanese Business Culture

Market Access Webinar, May 13th, 2025

Co-funded by the European Union

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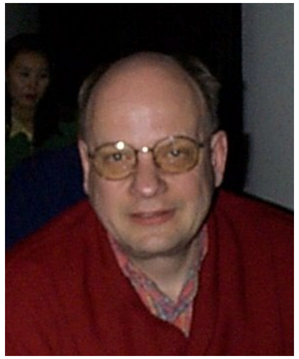
Introduction



Sven Eriksson

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- Graduated from Lund University in Sweden, physics engineering
- Master's Degree from Tokyo University, electrical engineering
- President and started a subsidiary of Eurotherm UK in Japan, process control
- Vice President, responsible for marketing in Ericsson Japan, infrastructure for mobile systems
- Consultant, helping foreign businesses to establish in Japan

Table of Contents

I. Japan's ICT Market Overview.
II. Government's Challenges and Ambitions.
III. Trends Emerging in the Japanese Market.
IV. Participants in the Market.
V. AI, Blockchain, and MaaS.

VI. Understanding the Japanese Business Culture.

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ICT Market in Japan

ICT market in Japan

Hardware manufacturing: Japan produces ICT hardware, including semiconductors, computers, and electronic components. The country has several large manufacturers, including **NEC, Toshiba, Fujitsu**, and **Sony**.

Software development: Japan has a strong software development industry, focusing on video games, mobile apps, and enterprise software. Companies such as **Square Enix, CyberAgent,** and **Rakuten** are significant players.

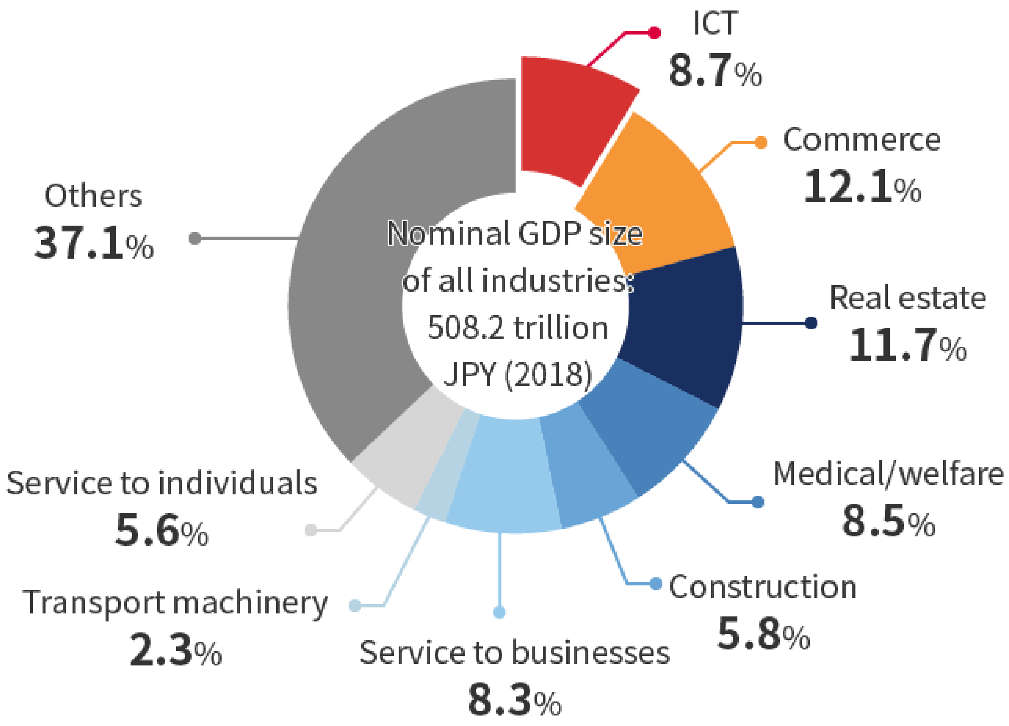
Telecommunications services: Japan has a highly advanced telecommunications infrastructure, with several large providers offering mobile, fixed-line, and internet services. **NTT, Softbank,** and **KDDI** are among the largest telecom companies in Japan.

E-commerce: Japan has a thriving e-commerce market, with several major online retailers such as **Amazon Japan, Rakuten** and **Yahoo! Shopping**. Mobile commerce is also popular in Japan, with many consumers using their smartphones to make purchases.

Cloud computing: Cloud computing is becoming increasingly popular in Japan, with many companies adopting cloud-based solutions for data storage, processing, and software delivery. Major providers in this space include **Amazon Web Services, Microsoft Azure,** and **Google Cloud Platform.**

ICT Market in Japan

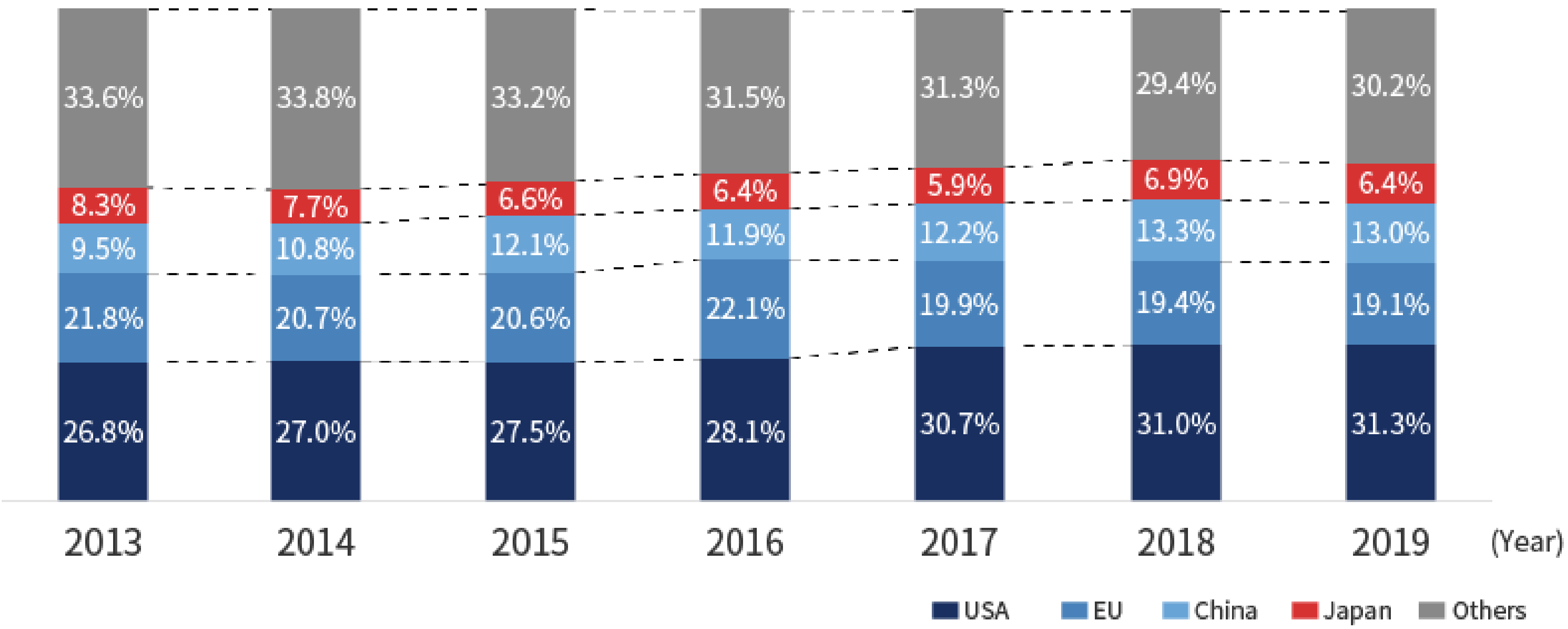
Nominal GDP of Japan's major industries (2018)



〔Source〕Created based on data from the Ministry of Internal Affairs and Communications

ICT Market in Japan

Worldwide share of ICT market (2013-2019)



〔Source〕Created based on data from Statista

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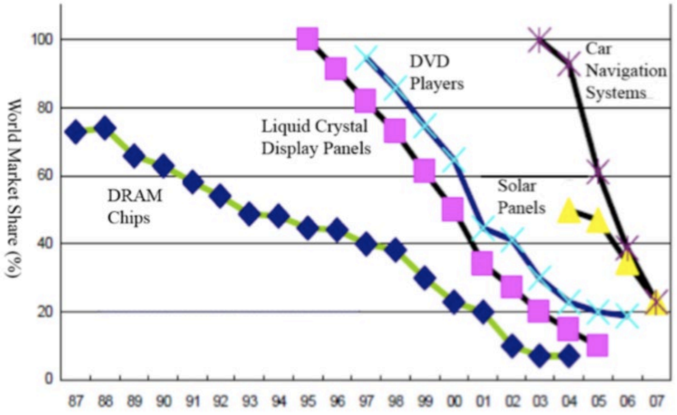
ICT Market in Japan

Electronic Industry

- Consumer Electronics
- Industrial Electronics
- Components and Devices

FIGURE 1. World Market Share, 1987 - 2007



Source: Ogawa, Kouichi. 2008. "From Product Innovation to Business Model Innovation." *IAM Discussion Paper Series #001*. Tokyo.

Production of Components & Devices has in absolute terms been relatively stable in Japan over the last 10 years.

However, worldwide production has increased, and now the combined output of Taiwan and Korea is twice as large as Japan.

Even if Japanese-made products are more expensive, they are still very competitive due to other aspects such as size, performance, quality and delivery on time.

ICT Market in Japan - Summary

- China is competing with low-cost
- Taiwan & Korea are competing with NPI
- Global players are competing with adhering to international standards and large volumes.
- Japan has lost its strength in **consumer electronics** and some parts of **industrial electronics** but is still strong in **electronic components**.

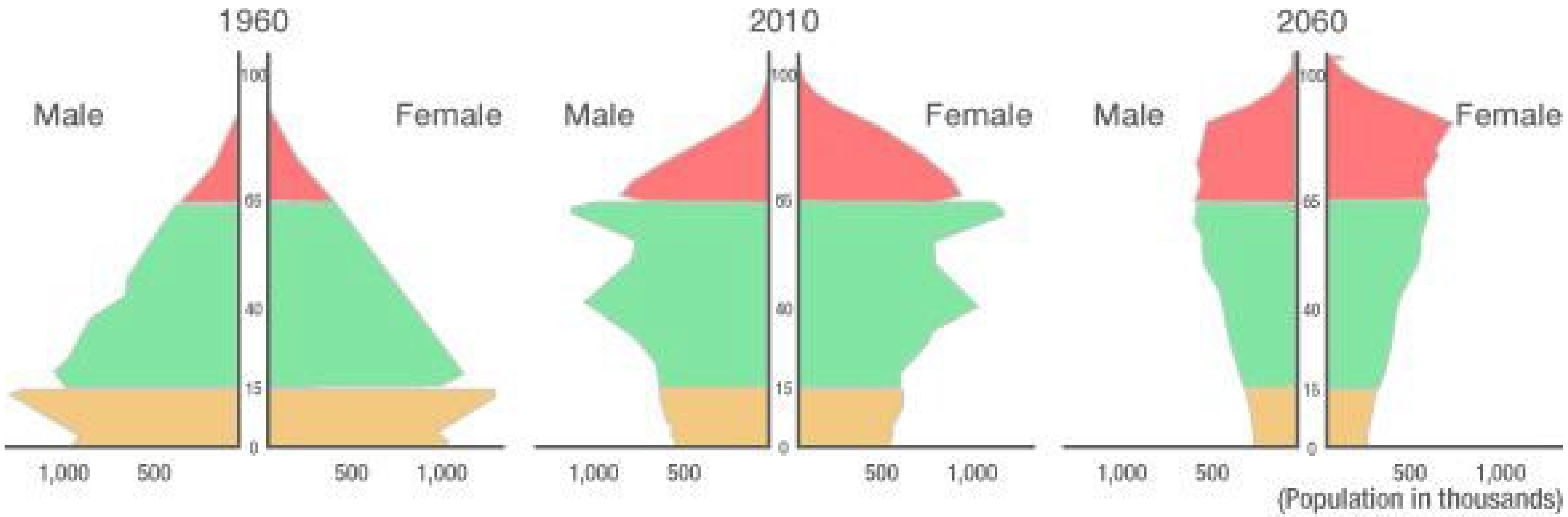
Table of Contents

I. Japan's ICT Market Overview.
➡ II. Government's Challenges and Ambitions.
III. Trends Emerging in the Japanese Market.
IV. Participants in the Market.
V. AI, Blockchain, and MaaS.

VI. Understanding the Japanese Business Culture.

Challenges and Ambitions for the Government

Japan's Changing Population Pyramid (population by age)



Sources: (For 1960 and 2010) Statistics Bureau (Ministry of Internal Affairs and Communications), *Population Census of Japan*; (for 2060 projection) National Institute of Population and Social Security Research, *Population Projections for Japan* (January 2012), based on medium-variant fertility and mortality assumptions.

Aging Population

これからは、
スマホの写真も動画も、
おうちのクラウドに残す。
おうちクラウド
DIGA
Glico

Challenges and Ambitions for the Government

Societal changes in Japanese Society

- Decreasing population
- The increasing ratio of senior people
- Urbanisation
- Stagnant GDP
- There is a need for more competencies, such as care workers but also IT engineers.

Davos agenda
WORLD ECONOMIC FORUM

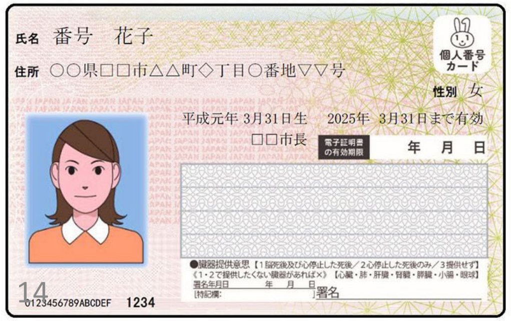
Special Address

Kishida Fumio
Prime Minister of Japan

Challenges and Ambitions for the Government

Japanese Government’s primary areas of interest with the ICT Industry:

- Promote ICT in the medical and nursing care service sector
- Broader usage of “My Number System.”
- Establish rules and regulations for creating new markets
- Cybersecurity



氏名 番号　花子

住所 ○○県□□市△△町◇丁目○番地▽▽号

個人番号カード

性別 女

平成元年 3月31日生　2025年 3月31日まで有効

□□市長

電子証明書の有効期限　年　月　日

●臓器提供意思【1 脳死後及び心停止した死後／2 心停止した死後のみ／3 提供せず】

《1・2で提供したくない臓器があれば×》【心臓・肺・肝臓・腎臓・膵臓・小腸・眼球】

署名年月日　年　月　日

[特記欄:　]署名

0123456789ABCDEF　1234

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Table of Contents

I. Japan's ICT Market Overview.
II. Government's Challenges and Ambitions.
III. Trends Emerging in the Japanese Market.
IV. Participants in the Market.
V. AI, Blockchain, and Maas.

VI. Understanding the Japanese Business Culture.

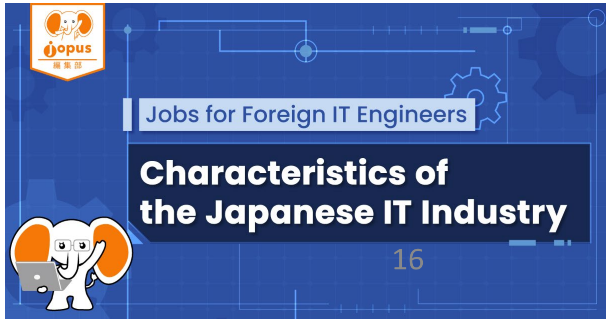
ICT Market in Japan

The Japanese software industry is one of the largest sectors within the Japanese ICT industry.

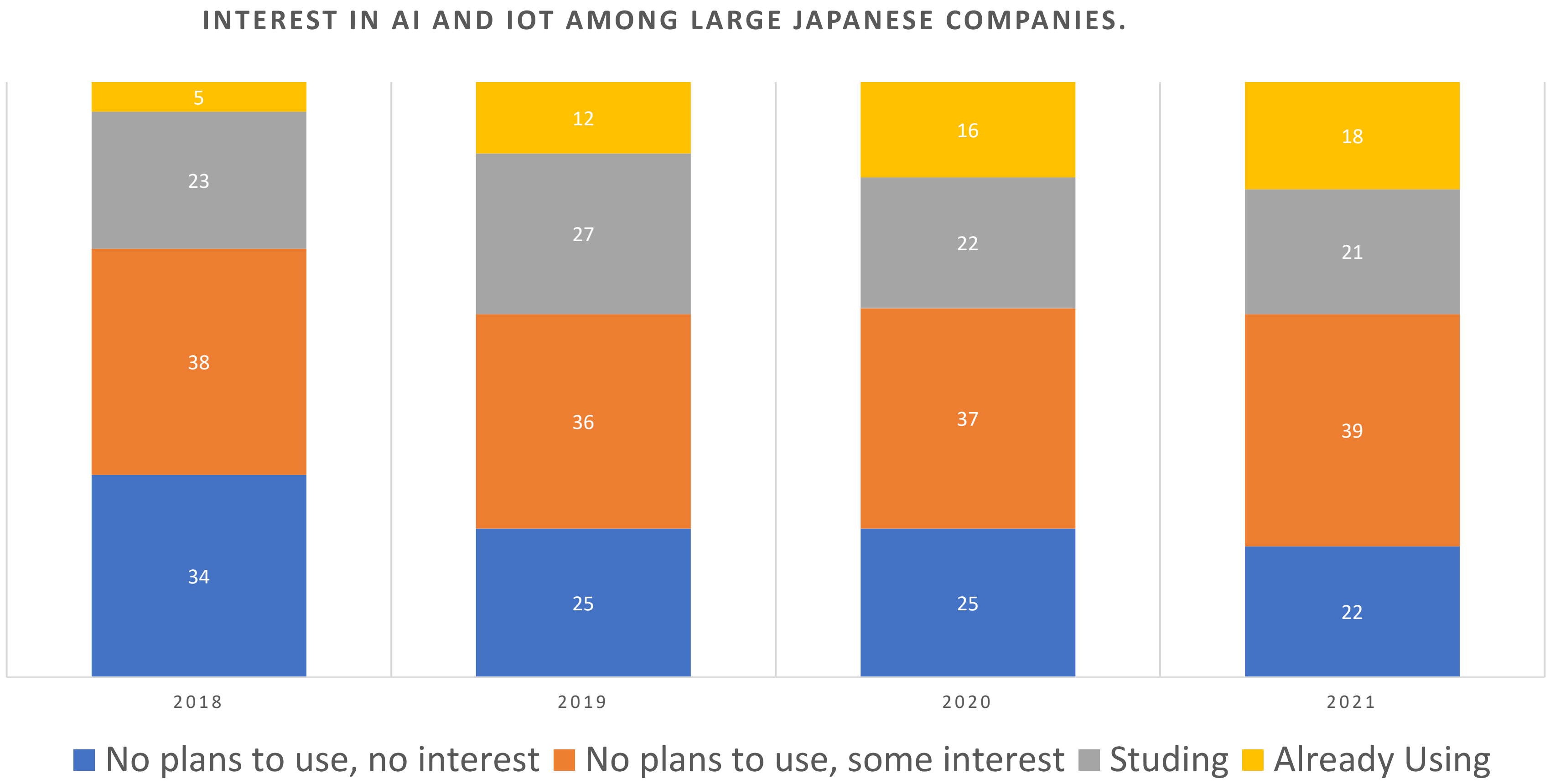
The sales of the software industry grew considerably in recent years and reached a value of almost 16.7 trillion Japanese yen in 2020.

More than 800 thousand people are employed at software companies.

Despite its size and importance, it has been perceived as lacking in international competitiveness, although this perception only applies to some areas equally.


jopus
編集部
Jobs for Foreign IT Engineers
Characteristics of the Japanese IT Industry

Challenges & Opportunities



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ICT Market in Japan

Fast-growing Applications Segments

- Manufacturing: monitoring and process control.
- Consumer: HEMS, home monitoring & automation, smart grid
- Government: medical care, nursing, healthcare, sports
- Public Utility: Electricity, gas etc. monitoring, infrastructure, buildings
- Retail: Just in time, POS, vending machine
- Transportation: Tracking vehicles or machinery, door-to-door delivery, vehicle and container logistics, parking place, terminal, airport etc.

ICT Market in Japan

Attractive markets identified by JETRO

JETRO, Japan External Trade Organisation, has identified six attractive markets in Japan:

- Data centre market
- Cloud market
- AI (Artificial Intelligence) market
- FinTech market
- IoT/M2M market
- Sharing economy/net services market
- An Individual Number, also known as My Number, is a 12-digit ID number issued to all citizens and residents of Japan and used for taxation, social security and disaster response purposes.

Latest Top Priority Areas in Japan’s ICT Industry

Priority Area	Key Government Initiatives and Goals
Digital Infrastructure & DX	Universal digital access, platform development, legacy system upgrades
AI	Innovation, safety standards, international cooperation, human resource development
Semiconductors & Advanced Tech	Large-scale investment, public-private partnerships, global competitiveness
Web3.0 & Blockchain	Social use cases, regulatory support, regional revitalization
Beyond 5G/6G	R&D, standardization, deployment of next-gen networks
Digital Twins & Data Society	Infrastructure management, urban modelling, data sharing
Human Resource Development	Digital skills training, education, workforce transformation

https://www.digital.go.jp/en/policies/priority-policy-program

Table of Contents

I. Japan's ICT Market Overview.
II. Government's Challenges and Ambitions.
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ICT Market in Japan

Major System Integrators

- Fujitsu – has a cloud-based IoT platform
- NEC – software package called CONNEXIVE
- NTT Data – part of the NTT Group
- Hitachi – investing heavily in IoT
- Toshiba – started a consortium with 100 companies

ICT Market in Japan

Application Developers

- All Major System Integrators are also application developers
- A large number of domestic application developers – large and small companies
- Many smaller application developers have a home base in India, and Vietnam, and very competitive prices. $20 - $60/Hr.

ICT Market in Japan

Sensor Manufacturing in Japan

According to Tokyoesque, Japan has a 54% market share in the sensor segment and, more specifically, 69% in image sensors, 67% for temperature sensors and 34% for acceleration, position, and flow sensors globally.

A crucial part of IoT systems is sensors. Japan`s firm position in this area is attributed to the Japanese focus on details and continuous improvements.

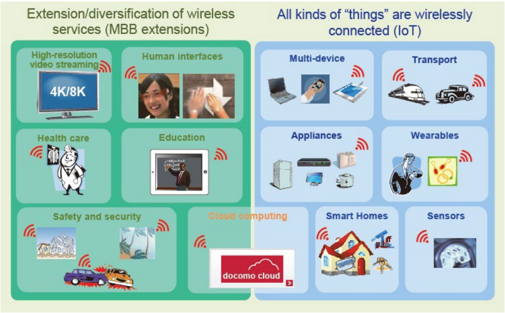
ICT Market in Japan

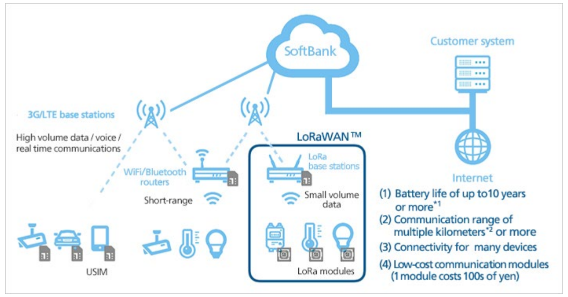
Sensor Manufacturers

- Hitachi: Weight sensors
- Panasonic: Vast number of sensors
- Canon: Image sensors
- Denso: Rotation sensors
- Mitsubishi: Strength, position, image, acceleration, infrared, and edge sensors
- Fujitsu: Biosensors
- Toshiba: Geomagnetic sensors
- TDK: Several types of sensors
- Minebea Mitsumi: Encoder, weight, and torque sensors
- Seiko Epson: Pressure, humidity, acceleration, and speed sensors
- Tokyo Electron Devices

Providers of Connectivity

- Fixed Line: NTT, Softbank, Power Companies, Local Municipalities etc.
- Cellular: NTT Docomo, KDDI, Softbank, Rakuten
- MVNO’s: Soracom, IIJ, plus several smaller companies
- SIGFOX: Kyocera


Extension/diversification of wireless services (MBB extensions)
All kinds of “things” are wirelessly connected (IoT)
High-resolution video streaming
4K/8K
Human interfaces
Multi-device
Transport
Health care
Education
Appliances
Wearables
Safety and security
Cloud computing
docomo cloud
Smart Homes
Sensors


SoftBank
Customer system
3G/LTE base stations
High volume data / voice / real time communications
WiFi/Bluetooth routers
Short-range
LoRaWAN™
LoRa base stations
Small volume data
Internet
USIM
LoRa modules
(1) Battery life of up to10 years or more*1
(2) Communication range of multiple kilometers*2 or more
(3) Connectivity for many devices
(4) Low-cost communication modules (1 module costs 100s of yen)

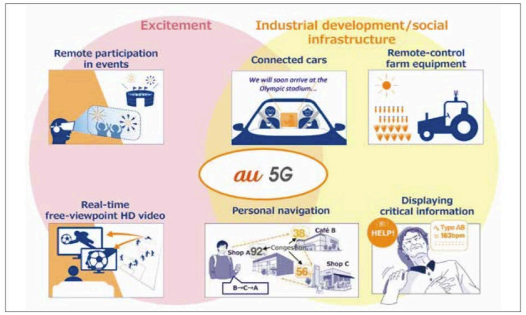

Excitement
Industrial development/social infrastructure
Remote participation in events
Connected cars
We will soon arrive at the Olympic stadium...
Remote-control farm equipment
au 5G
Real-time free-viewpoint HD video
Personal navigation
Shop A
92
Congestion
38
Café B
56
Shop C
B→C→A
Displaying critical information
HELP!
Type AB
163bpm

Table of Contents

I. Japan's ICT Market Overview.
II. Government's Challenges and Ambitions.
III. Trends Emerging in the Japanese Market.
IV. Participants in the Market.
→ V. AI, Blockchain, and MaaS.

VI. Understanding the Japanese Business Culture.

Cyber Security

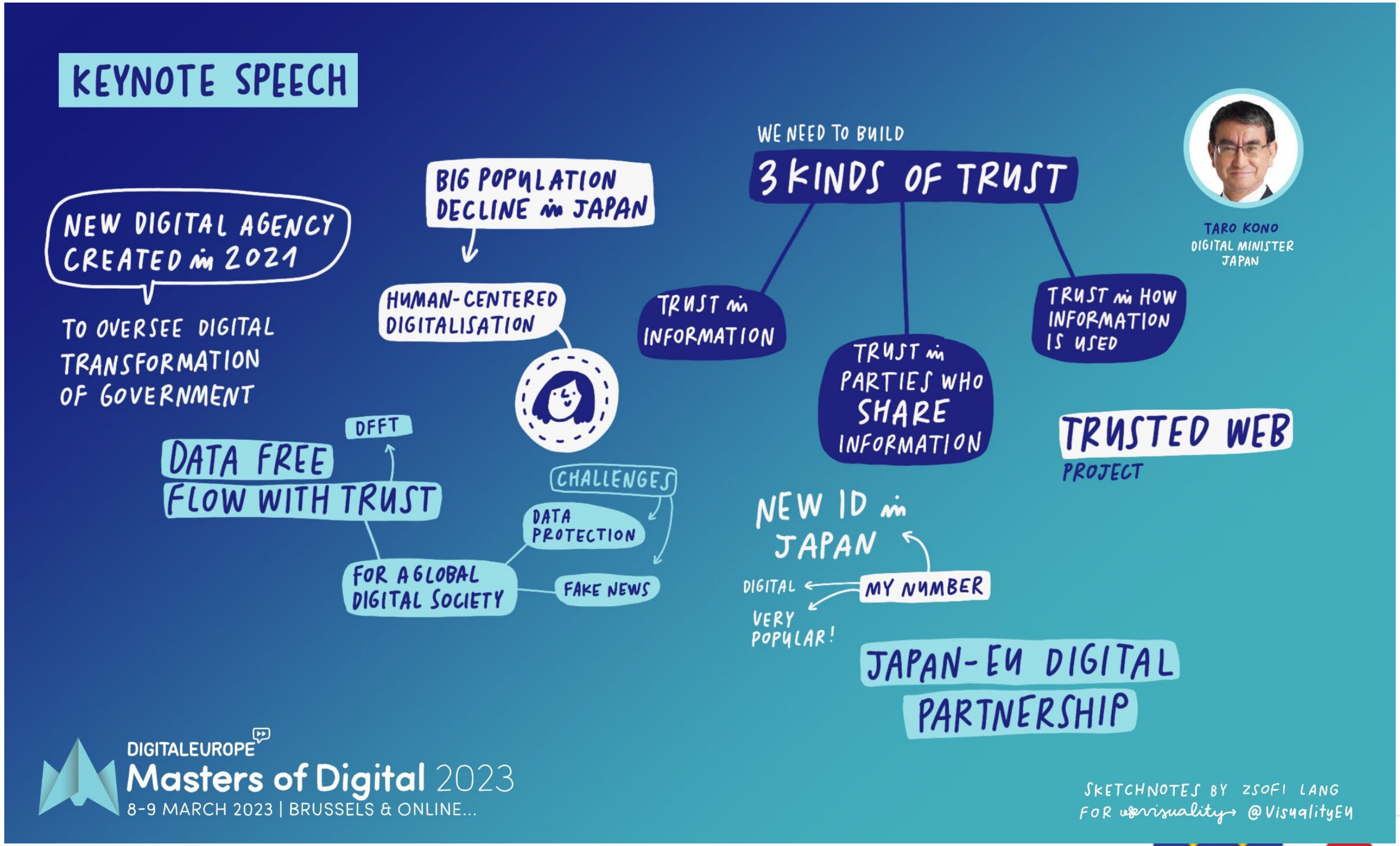
Cyber Security

Cybercrime in Japan hits record high in 2022 as ransomware cases surge. (March 16, 2023)

- During covid, remote working increased
- Both large and small enterprises are attacked
- A new team has been established within the police to tackle serious cybercrime.
- Attacks were launched through VPN, remote desktop and emails
- It took 1-2 months to restore the systems at a cost between 10 and 50 MJPY

https://www.japantimes.co.jp/news/2023/03/16/national/crime-legal/japan-cybercrime-rise/

Cyber Security



KEYNOTE SPEECH

NEW DIGITAL AGENCY CREATED in 2021

TO OVERSEE DIGITAL TRANSFORMATION OF GOVERNMENT

BIG POPULATION DECLINE in JAPAN

HUMAN-CENTERED DIGITALISATION

DFFT

DATA FREE FLOW WITH TRUST

FOR A GLOBAL DIGITAL SOCIETY

CHALLENGES

DATA PROTECTION

FAKE NEWS

WE NEED TO BUILD

3 KINDS OF TRUST

TRUST in INFORMATION

TRUST in PARTIES WHO SHARE INFORMATION

TRUST in HOW INFORMATION IS USED

TARO KONO
DIGITAL MINISTER
JAPAN

TRUSTED WEB
PROJECT

NEW ID in JAPAN

MY NUMBER

DIGITAL

VERY POPULAR!

JAPAN-EU DIGITAL PARTNERSHIP

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8-9 MARCH 2023 | BRUSSELS & ONLINE...

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Cyber Security

In Japan, cybersecurity is prioritised through various means, including:

- Education and R&D contests
- Web 3.0
- Blockchains
- Quantum Key Distribution (QKD)

AI

AI

AI

The Japanese government considers AI one of the central elements contributing to "Society 5.0," a vision of society in which physical space and cyberspace are increasingly interconnected.

The anticipation surrounding AI has led to increased research activities among institutions and private enterprises.
There are around 9000 patents related to AI in Japan, and the primary patent holder is Fujitsu.
The end-user expenditure on AI is increasing by more than 20% annually and is expected to reach one trillion yen in 2027.

Japanese people are, in general, positive towards AI.

AI

There are no regulations in Japan that directly prohibit the use of AI. However, the operator may be held liable for tort or product liability if an accident occurs due to AI systems.

The government provides various tools to help companies implement appropriate AI governance measures voluntarily.

Blockchain

Blockchain

Blockchain

- The use of blockchains in the public and non-financial sectors is increasing in Europe and North America, and conditions are becoming ripe for forming ecosystems involving the finance industry.

- In Japan, by contrast, although initiatives are vigorously moving forward in the financial sectors, there are still few success stories from the public or non-financial sectors.

Blockchain

Japan is actively trying to integrate blockchain technology across multiple facets of its ICT sector, driven by government policy and private sector innovation.

Area	**Blockchain integration examples**
Financial Services & Web3.0	Crypto assets, NFTs, stablecoins, partnerships with foreign tech firms, regulatory support
Supply Chain	Data transparency, product traceability, compliance, streamlined operations
Healthcare	Secure EHRs, telemedicine, audit trails, cross-border data exchange, public blockchain use
Government/Public Sector	Digital identity, public service modernization, regional digital transformation
ICT Infrastructure	Integration with Beyond 5G, Cyber Physical Systems, regulatory incentives

Blockchain Success Stories in Japan

Financial Services: Japan pioneered a regulatory framework for crypto assets (“Crypto Assets”), leading to increased adoption of blockchain technology in finance. As of September 30, 2023, there are 29 licensed Crypto Asset exchange service providers (“CAESPs”) in Japan. The Diet passed a bill to amend the Payment Services Act (the “PSA”) in June 2022 to introduce new stablecoin regulations, effective June 1, 2023.

Supply Chain: Major corporations in the automotive, electronics, and food and beverage sectors have adopted blockchain to track goods in real time, verify product authenticity, and reduce fraud.

Government support and a strong tech ecosystem have attracted both domestic and international blockchain companies, further driving innovation and adoption.

Blockchain

Several start-ups are dedicated to developing blockchain technologies and accelerating the commercialisation of blockchain technologies.
The Japanese government is interested in improving security; Blockchain can be helpful in this for AI and IoT.

On 27 December 2022, the Web3.0 Study Group of the Digital Agency published a report identifying various issues with digital assets (such as crypto-assets and NFTs), DAOs, distributed identities (DIDs), connections to the metaverse, user protection and law enforcement.

Reference;
https://www.amt-law.com/asset/res/news_2024_pdf/publication_0028484_ja_001.pdf

Business Analytics in Japan

Business Analytics

Business Analytics Landscape in Japan:

- Growing Interest in Analytics
  - Japan's traditional industries are embracing data-driven approaches.
  - Increased awareness of the potential benefits of analytics across sectors.
- Key Industries Utilizing Analytics
  - Manufacturing, finance, retail, healthcare, and more.
  - Case studies: Toyota, Rakuten, Sony, and MUFG Bank.

Business Analytics

Challenges in Business Analytics Adoption

- Data Privacy and Security
  - Ensuring compliance with stringent data protection regulations.
- Skilled Workforce Shortage
  - Demand for data analysts and scientists outpaces supply.
- Cultural Factors
  - Traditional business practices may hinder rapid adoption of analytics.

Business Analytics

Business Analytics Success Stories

- Rakuten: Personalized Recommendations
  - Utilizing customer data for personalized e-commerce recommendations.
- Toyota: Supply Chain Optimization
  - Data-driven insights for efficient inventory management and production.
- MUFG Bank: Risk Management
  - Predictive analytics to assess and mitigate financial risks.

FinTech

FinTech

Japan’s rock-solid yet inflexible financial infrastructure (i.e. ATMs and bank IT systems) means that venture capitalists cannot expect a quick return on their investment. As a result, it is difficult to attract investors, and the development of new financial businesses tends to lag behind other nations.

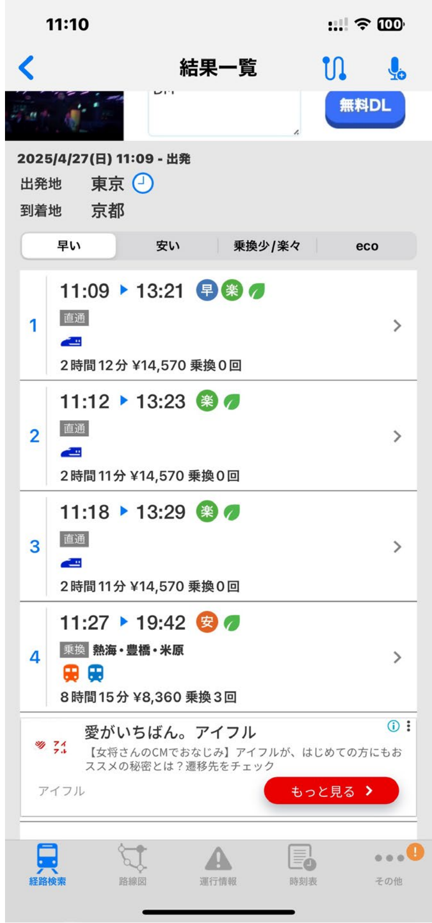
Regarding innovation culture and consumer demand for fintech, Japan is inferior to other countries and is unlikely to become attractive as a fintech hub shortly.

Mobility as a Service (MaaS)

MaaS

MaaS (Mobility as a Service) integrates various transportation options such as trains, buses, taxis, ride-sharing, and even on-demand and autonomous vehicles into a single digital platform.

Users can search routes, make reservations, and complete payments in one place, aiming for a seamless travel experience that reduces the need for private car ownership.



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結果一覧

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到着地　京都

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2時間12分 ¥14,570 乗換0回

2　11:12 ▸ 13:23 楽
直通
2時間11分 ¥14,570 乗換0回

3　11:18 ▸ 13:29 楽
直通
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4　11:27 ▸ 19:42 安
乗換 熱海・豊橋・米原
8時間15分 ¥8,360 乗換3回

愛がいちばん。アイフル
【女将さんのCMでおなじみ】アイフルが、はじめての方にもおススメの秘密とは？遷移先をチェック
アイフル
もっと見る ›

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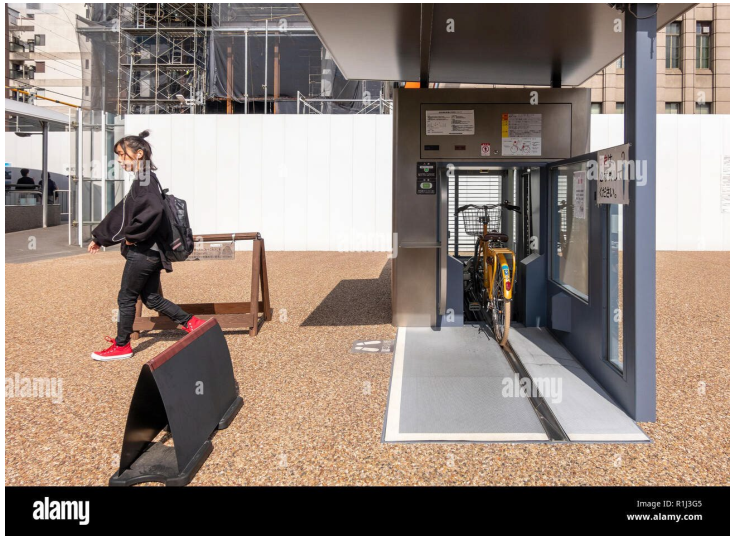
Mobility as a Service (MaaS)

Key Features of MaaS in Japan

- Combines public and private transport modes, leveraging Japan’s extensive and punctual transit networks.
- Integrates additional services like tourism, medical care, and local events tailored to both residents and visitors.
- Focuses on cashless payments, subscriptions, and real-time data sharing to improve convenience.



Mobility as a Service (MaaS)

Why is MaaS Important in Japan?

- Addresses declining ridership due to an ageing and shrinking population, especially in rural areas.
- It supports tourism and makes travel easier for foreigners, women, and the elderly.
- It aims to provide eco-friendly, efficient alternatives to car ownership, supporting sustainability goals.

高槻
女性専用車 Women Only
女性専用車 Women Only
alamy
Image ID: D9FWD7
www.alamy.com

Mobility as a Service (MaaS)

Current Status and Initiatives

- Over 80 MaaS projects are active in Japan, with more than 80% focused on rural mobility challenges.

- Major cities like Tokyo and Fukuoka have launched multi-modal apps (e.g., “my route”) that integrate walking, public transit, taxis, and destination information into a single platform.

- The Japanese government and private sector are collaborating to standardise data, improve integration, and promote new mobility solutions, including AI-driven and autonomous vehicles.

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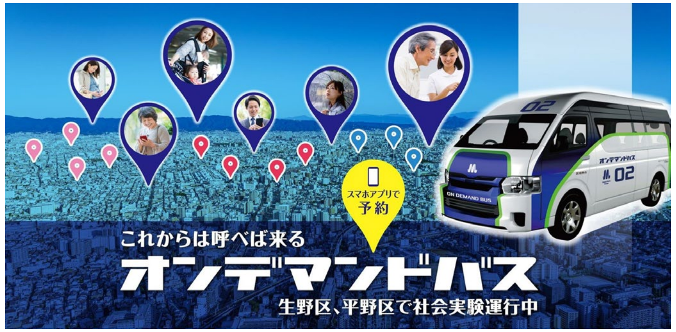
Mobility as a Service (MaaS)

Unique Aspects of Japanese MaaS


スマホアプリで
予約
これからは呼べば来る
オンデマンドバス
生野区、平野区で社会実験運行中

- The strong involvement of private railway and transport companies encourages innovation and competition.
- Customised approaches are needed for different areas: metropolises, suburbs, regional cities, rural areas, and tourism destinations.

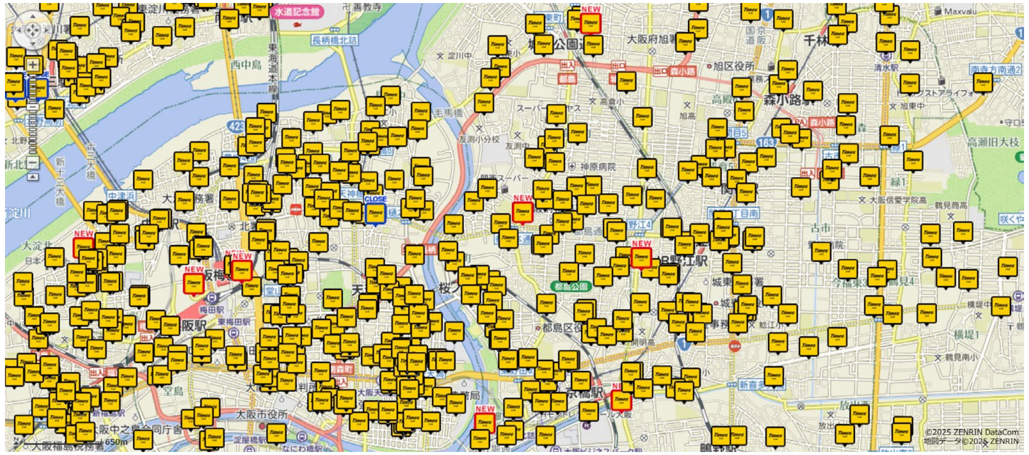

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Table of Contents

I. Japan's ICT Market Overview.
II. Government's Challenges and Ambitions.
III. Trends Emerging in the Japanese Market.
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➡ VI. Understanding the Japanese Business Culture.

Japanese Business Culture

This segment seeks to offer practical knowledge and insights into navigating Japanese business culture, fostering effective relationships, and achieving success in the Japanese market.

Russia
China
Sapporo
North Korea
Sea of Japan
Akita
JAPAN
Sendai
South Korea
Yellow Sea
Tokyo
Hiroshima
Kobe
Yokohama
Kitakyushu
Nagoya
Osaka
Fukuoka
Nagasaki
China Sea
Ryukyu Islands
Pacific Ocean
Okinawa
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Content

- Fundamentals of Japanese Business Culture
- Business Etiquette and Formalities
- Communication Styles in Japan
- Japanese Business Meetings: Structure and Best Practices
- Decision-Making and Negotiation
- Building Long-Term Partnerships

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Fundamentals of Japanese Business Culture

- Core values: hierarchy, respect, and group harmony (wa)
- Collectivism vs. individualism: implications for teamwork and competition
- The importance of long-term relationships and trust-building

- **Manners** in Japan have always been directed at maintaining and preserving social harmony.
- **Getting along** with the other fellow was necessary, and the individual self was less significant than the group's welfare.
- The "**classier**" the person, the less he needed to display himself.

“To avoid causing inconvenience to others”.

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Fundamentals of Japanese Business Culture

“A good man take care of himself”

When rice-farming cooperation is essential

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Business Etiquette and Formalities

- Rituals and formality in meetings: dress code, punctuality, and seating arrangements
- Business card (meishi) exchange: protocols and significance
- Gift-giving customs and their role in relationship-building

- Do not discuss business matters immediately at the first meeting. Instead, learn about your potential partner.
- Integrity, reliability, commitment and humility are reviewed
- Give some small gifts
- Change business cards

BE ON TIME
EVERYTIME
MAKE ME BETTER

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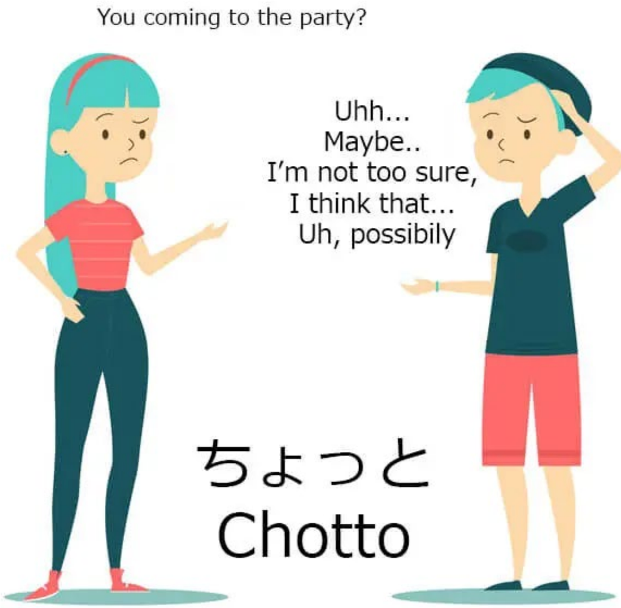
Communication Styles in Japan

- Polite language and honorifics (keigo, teineigo, sonkeigo, kenjougo)
- Indirect communication: reading between the lines, non-verbal cues, and the meaning of "yes" and "no"
- Active listening and consensus-building in discussions


You coming to the party?
Uhh… Maybe.. I'm not too sure, I think that… Uh, possibily
ちょっと
Chotto

Meaning of "Yes" in Japanese
How to say "No" in Japanese
How to listen to somebody

Do not ask questions with two negations
(You don't like *not* to ……?)
Irony or sarcasm jokes are not understood in Japan.

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Japanese Business Meetings: Structure and Best Practices

- Setting agendas and preparing for meetings.
- Meeting protocols encompass introductions, opening formalities, and closing procedures.
- The significance of face-to-face interactions and a follow-up culture.

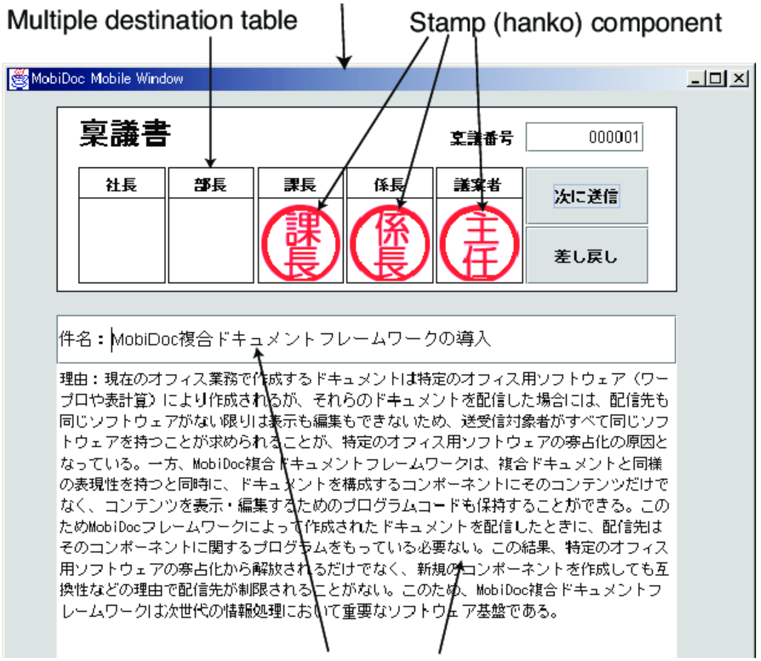
- **Formality and structure in meetings.**
- **Preparing and distributing agendas in advance.**
- **No surprises!**
- **The significance of active listening and avoiding interrupting others.**

Japanese Business Meetings: Structure and Best Practices

- The preference for subtle expressions and non-verbal cues.
- Ask many questions without commenting on the replies.
- Negotiations should be conducted politely and calmly.
- The Japanese are very information-oriented and seek to understand many details.
- Often ask the same question repeatedly.
- Understanding the significance of silence during conversations.
- The concept of "Wa” (harmony) and its influence on communication dynamics.

Decision-Making and Negotiation

- Consensus-based decision-making: group consultation and approval cycles.
- Navigating hierarchy and status during negotiations.
- Managing uncertainty and risk aversion in Japanese organisations.



稟議書

稟議番号 000001

社長	部長	課長	係長	議案者
		課長	係長	主任

件名：MobiDoc複合ドキュメントフレームワークの導入

理由：現在のオフィス業務で作成するドキュメントは特定のオフィス用ソフトウェア（ワープロや表計算）により作成されるが、それらのドキュメントを配信した場合には、配信先も同じソフトウェアがない限りは表示も編集もできないため、送受信対象者がすべて同じソフトウェアを持つことが求められることが、特定のオフィス用ソフトウェアの寡占化の原因となっている。一方、MobiDoc複合ドキュメントフレームワークは、複合ドキュメントと同様の表現性を持つと同時に、ドキュメントを構成するコンポーネントにそのコンテンツだけでなく、コンテンツを表示・編集するためのプログラムコードも保持することができる。このためMobiDocフレームワークによって作成されたドキュメントを配信したときに、配信先はそのコンポーネントに関するプログラムをもっている必要ない。この結果、特定のオフィス用ソフトウェアの寡占化から解放されるだけでなく、新規のコンポーネントを作成しても互換性などの理由で配信先が制限されることがない。このため、MobiDoc複合ドキュメントフレームワークは次世代の情報処理において重要なソフトウェア基盤である。

The decision-making process:

- Very slow based on consensus
- Ringi system, everybody involved

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Building Long-Term Partnerships

- Two-tier relationship building: friendship before business.
- Maintaining trust and fostering ongoing communication.
- Adapting to Japanese expectations for long-term commitment.

- Importance of building trust and rapport before conducting business.
- The role of socialising and bonding through "Nomikai" (drinking parties).
- The art of exchanging business cards (Meishi) with respect and consideration.

Challenges for European companies

Lack of locally experienced talent well-versed in IT and its applications.
Japan generally needs IT engineers, which can be challenging for small foreign companies to recruit.

Weak brand to offer.
Many small European start-ups in the IT field are not yet well known, with “weak” brands that may prolong the process of getting into the Japanese market.

Cultural differences.
Japan’s business culture is different from Europe's, and it may take some time to understand the essential differences.

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Thank you very much!

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63

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Q&A Session