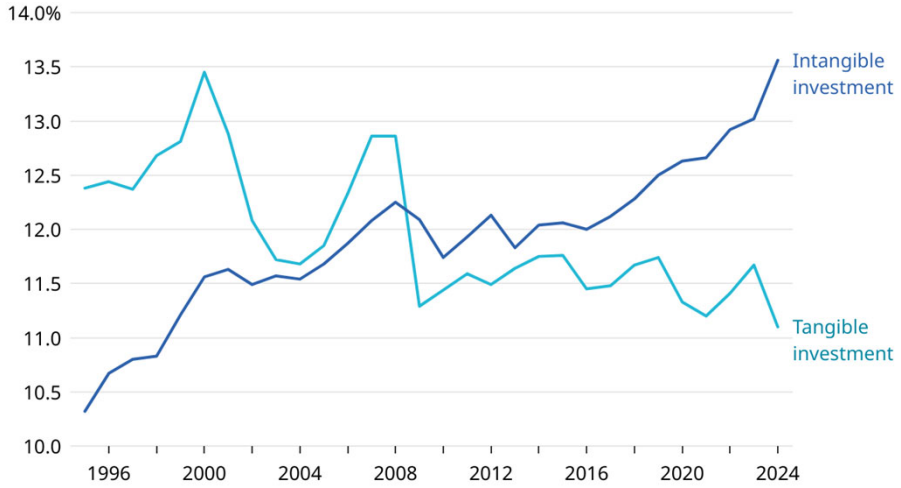
Outline of Intellectual Property Strategic Program 2026

June, 2026

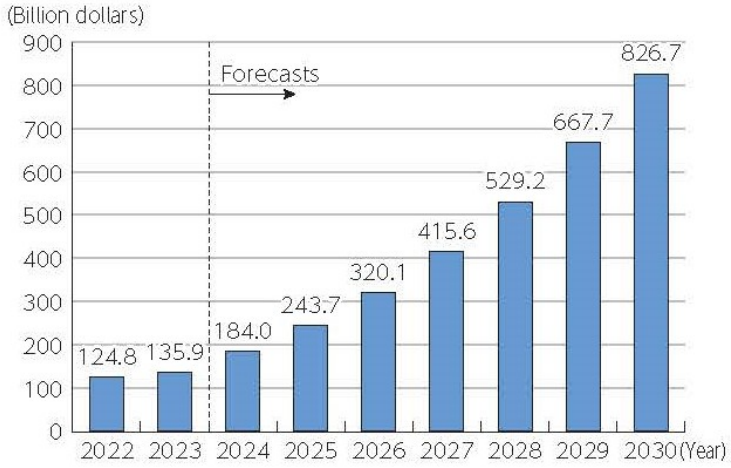
Basic understanding

- ○ In recent years, investment in intangible assets has been growing rapidly on a global scale, with intellectual property (IP) and intangible asset investment driving economic growth worldwide.
- ○ The rapid social implementation of generative AI has the potential to bring about major transformations in all aspects of society, including industrial structures, labor markets, people's lives, and values. A major wave of transformation is also sweeping through the environment surrounding IP and intangible assets.
- ○ Amid intensifying global economic competition and heightened geopolitical risks, the importance of economic security is growing in order to enhance Japan's autonomy and secure superiority in technologies and other areas. IP strategy is an indispensable element from the perspective of economic security as well.
- ○ In a world where the existing international order and rules can no longer be taken for granted, the strategic utilization of international and domestic standards is essential to strengthen Japan's industrial competitiveness and ensure economic security.
- ○ Japan's content industry, with a domestic market size of 13.3 trillion yen (2023) and an overseas market size of 6.1 trillion yen (2024), is now one of Japan's core industries, surpassing even the steel and semiconductor industries in scale.
- ○ The Cool Japan-related industries have expanded their overseas market reach to 30.7 trillion yen (approximately 13% increase compared to 2025 projections), serving as a key source of Japan's earning power in global markets.



(Source) WIPO "World Intangible Investment Highlights 2025"

Trend in intangible and tangible investment as a share of GDP (%), 1995–2024



(Source) Ministry of Internal Affairs and Communications, "White Paper Information and Communications in Japan 2025"

Changes and forecasts of the size of the global AI market (sales)

Future Direction of Intellectual Property Strategy

○ Intellectual property and intangible assets are **the source of corporate earning power and Japan's growth potential**. In order to **accelerate Japan's growth through the usage of intellectual property**, while responding to changes in the economic and social environment, **such as advances in generative AI and the growing importance of economic security**, we **will promote the strategic "creation," "protection," and "utilization" of intellectual property and intangible assets**.

Further Promotion of Corporate Management and National Strategies Centered on Intellectual Property and Intangible Assets

- Promoting the identification of winning strategies and concentrated IP investment through **IP landscape utilization across the 17 strategic fields** of Japan's growth strategy.
- **Advancing open & close strategies** for **the practice of management leveraging intellectual property and intangible assets**, protection and utilization of technologies, and international standards strategies.
- **Raising awareness among corporate management regarding the importance of intellectual property and intangible assets**, strengthening the involvement of corporate IP divisions in management strategies and value creation processes, and developing a common language between management and IP division stakeholders.

Protection of Intellectual Property Suited to the New Era of Generative AI and Other Technologies

- **Establish "Principle-Code for Protection of intellectual property and transparency for the appropriate use of generative AI " (tentative name),** promote awareness both domestically and internationally, and advance the development of frameworks that encourage the return of remuneration to creators and others.
- **Advance efforts to enhance the effectiveness of deterring intellectual property infringement**—including ensuring appropriate deterrent functions against infringing acts, building mechanisms that facilitate the exercise of rights by consolidating intellectual property rights held by multiple right holders, and streamlining evidence collection by right holders—**and develop an environment in which disputes can be resolved promptly and appropriately when infringement occurs.**

Promotion of International Standards Strategy in Conjunction with Growth Strategy

- In order to further strengthen efforts based on the "New International Standards Strategy," **international standards aimed at creating demand and markets will be built into the Public-Private Investment Roadmap** for the 17 strategic fields selected by the Council for Japan's Growth Strategy, which was established in November last year, thereby **advancing the international standards strategy in an integrated manner with the growth strategy.**

Advancing Content Strategy through Growth Investment

- In order to achieve the government's target of expanding the overseas market size to 20 trillion yen by 2033**, steadily promote the Public-Private Investment Roadmap for content field.**
- Eliminate bottlenecks in human resources, production environment, and overseas expansion and distribution, and the government will **promote large-scale, long-term, and strategic public-private investment through a bold policy package to expand growth investment.**

Strengthening Overseas Expansion of Cool Japan to Drive Earning Power

- In order to achieve the government's target of expanding overseas business to over 50 trillion yen by 2033, **we will strategically work to deepen and expand nationwide the initiatives at content regional revitalization bases, foster fans of Japan through inbound consumption, and expand exports.**

"Intellectual Property Strategic Program 2026“ ～Promotion of IP Strategy Supporting Growth Strategy～Key Points

1. Value Creation through Promotion of Investment in Intellectual Property and Intangible Assets

- Promoting **national and growth strategies centered on intellectual property and intangible assets**
  - In order to **secure strategic indispensability and competitive advantages in the 17 strategic fields** of Japan’s Growth Strategy, we make efforts to **identify winning strategies through the use of IP landscapes**, promote concentrated IP investment and intellectual property and intangible asset governance, actively utilize intellectual property as a **countermeasure against other countries' IP hegemony strategies and IP infringement risks**, **and advance the international standards strategy in an integrated manner with the growth strategy.**
- **Further penetration of IP management with intellectual property** and intangible assets at the core of management strategy
  - By the end of FY2026, **the Intellectual Property and Intangible Asset Governance Guidelines will be revised,** contributing to the visualization of intellectual property and intangible assets and to the creation of an environment in which funds flow toward medium- to long-term growth investment rather than the pursuit of short-term profits.
  - In order to make it easier for investors to understand and evaluate the significance of investment in intellectual property and intangible assets and their contribution to value creation, **the appropriate approach to disclosure will be examined, including the necessity of disclosure in annual securities reports, integrated reports, and other documents.**

2. Protection of Intellectual Property Suited to the New Era of Generative AI

- Balancing **the appropriate protection of intellectual property rights** with **the promotion of advances in generative AI technology**
  - Establishing a "Principle-Code for Protection of intellectual property and transparency for the appropriate use of generative AI " (tentative name) aimed at ensuring a safe and secure environment for rights holders and users, while promoting the development of an environment for returning remuneration to creators and others
- Examining the appropriate institutional arrangements for effective intellectual property protection **suited to the era of economic security**
  - **Introducing civil remedy provisions to ensure recovery of damages and disgorgement of infringer's profits** in order to enhance the effectiveness of infringement deterrence
  - Building a mechanism to **facilitate the exercise of rights by consolidating intellectual property rights held by multiple rights holders**
  - **Facilitating the collection of evidence** by intellectual property rights holders

3. Advancing Content Strategy through Growth Investment

- **Large-scale, long-term, and strategic public-private investment** based on the "Public-Private Investment Roadmap“ for content field
  - Establishment of **a new integrated support framework** aimed at optimizing overall budget allocation, consolidating budget execution, and bringing together the collective wisdom of the public and private sectors
  - **Support for overseas expansion and distribution,** including support for the production of large-scale works, overseas expansion of distribution platforms, and anti-piracy measures
  - **Support for human resource,** including flexible multi-year support for creators who will lead the next generation and promotion of global human resource development in the content field
  - **Realization of “National Center for Media Arts” (tentative name)** through public-private collaboration

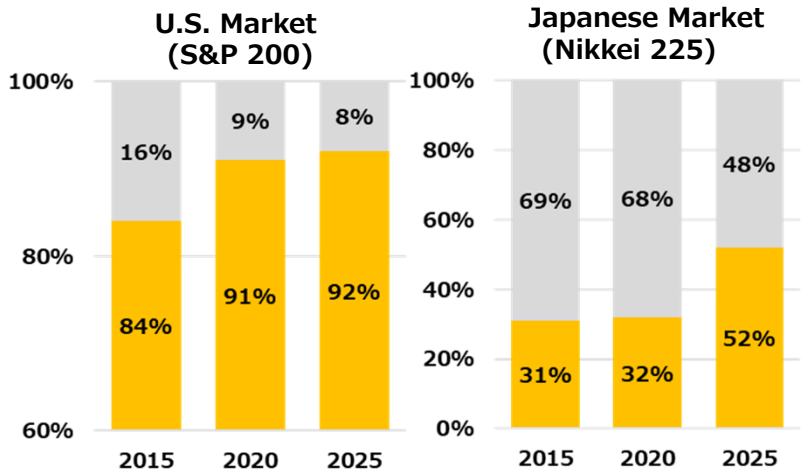
Value Creation through Investment in Intellectual Property and Intangible Assets

Creation

- ◆ **Identify bottlenecks impeding the implementation of intellectual property and intangible asset management—including engagement of senior management, approaches to growth investment, and utilization of metrics—and develop solutions to address them, thereby realizing sustainable value creation and strengthening international competitiveness of enterprises.**
- ◆ Promote **the utilization of IP landscapes to clarify winning strategies across the 17 strategic fields of Japan's Growth Strategy.**

Current Status and Challenges

- ○ **While the proportion of intangible assets in market capitalization** has been on an upward trend, **it remains at a low level** compared to the United States. There are concerns about a decline in competitiveness due to the overseas shift of corporate research and development activities. In line with the Science, Technology and Innovation Basic Plan, the target is to achieve a combined public and private research and development investment of 180 trillion yen over the next five years.
- ○ Although guidelines and other frameworks to promote investment in intellectual property and intangible assets have been established, the implementation of **intellectual property and intangible asset management remains a work in progress.** There is a need to identify the bottlenecks hindering such implementation and to present measures to address them.
- ○ **Disclosure related to intellectual property and intangible assets** remains insufficient.
- ○ **With respect to the winning strategies in each the 17 strategic fields of Japan's Growth Strategy**, there is a need to verify these strategies through intellectual property information analysis that **provides a broad overview and forecast of the competitive landscape, and to maximize the effectiveness of investment**.



(Source) Compiled by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters, based on the Ocean Tomo Intangible Asset Market Value Study

Ratio of Intangible Assets to Market Capitalization

Future Plans (Direction)

- ○ **In conjunction with the revision of the Intellectual Property and Intangible Asset Governance Guidelines, which organizes the roles of CxOs, approaches to growth investment, development of management talent, and utilization of metrics, as well as the revision of the Corporate Governance Code,** measures will be examined to further promote and embed the underlying concepts, **including the dissemination of messages conveying the essential value of intellectual property and intangible assets to the boards of directors and management** of listed companies.
- ○ In order to create an environment in which the significance of investment in intellectual property and intangible assets can be more readily assessed, the appropriate approach to disclosure will be examined, **including the promotion of voluntary disclosure through integrated reports and other means, as well as the possibility** of making matters related to intellectual property and intangible assets disclosure items in securities reports.
- ○ With respect to the **17 strategic fields** identified by the Council for Japan's Growth Strategy, **IP landscapes utilizing** patent and other intellectual property information will be leveraged **to clarify the path to success for research and development projects supported** by the government and other public entities.

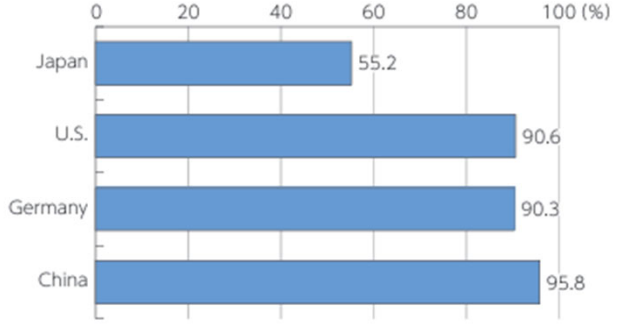
AI and Intellectual Property Rights

Creation

- ◆ In light of the AI Act and the Basic Plan on AI, we will advance **deliberations toward achieving both the promotion of progress in generative AI technology and the appropriate protection of intellectual property rights.**
- ◆ **In light of the expanding utilization of AI in the fields of patents and designs,** we will advance **deliberations on practical challenges and related issues.**

Current Status and Challenges

- ○ While the market size and research investment in AI are increasing, the utilization of generative AI in business operations among Japanese companies lags behind that of overseas counterparts.
- ○ The rapid advancement of generative AI **has given rise to new challenges concerning the intellectual property system,** including the handling of training data and the relationship between AI-generated outputs and copyright, and creators and rights holders have expressed concerns regarding the risk of copyright infringement and other related issues.
- ○ The development of generative AI technology has brought about various challenges in relation to the existing industrial property rights system, necessitating appropriate responses.



(Source) Ministry of Internal Affairs and Communications, "White Paper on Information and Communications in Japan 2025"

Generative AI Utilization Rate in Business Operations at Enterprises (by Country)

Future Plans (Direction)

- ○ Taking into account that the unauthorized generation and publication of voice content imitating the voices of actors, voice actors, and **others may, in certain cases, constitute an infringement of publicity rights and other rights**, the Government will **conduct legal analysis regarding the interpretation and application of tort law related to such infringements based on current laws and judicial precedents, develop guidelines and other materials, and disseminate the results widely,** while **continuing discussions on the necessity of hard law development (including amendments to the Unfair Competition Prevention Act)** toward more reliable rights protection.
- ○ **The Government will establish "Principle-Code for Protection of intellectual property and transparency for the appropriate use of generative AI " (tentative name) aimed at ensuring a safe and secure environment for rights holders and users**, and will **promote the development of an environment for returning remuneration to creators and others.**
- ○ Regarding the relationship between AI-generated summary services and technical measures such as robots.txt, the Government will **organize relevant issues concerning the appropriate approach to measures such as disclosure of user agents and compliance with robots.txt and similar protocols,** with a view to preventing improper use.
- ○ **In light of the expanding utilization of AI in the fields of patents and designs driven by advances in AI technology**, the Government **will proceed with examination** of **issues arising in patent and design practices** at the Patent System Subcommittee and Design System Subcommittee of the Intellectual Property Committee of the Industrial Structure Council, **while monitoring international trends.**

Strengthening Creative Human Resources and Achieving Diversity

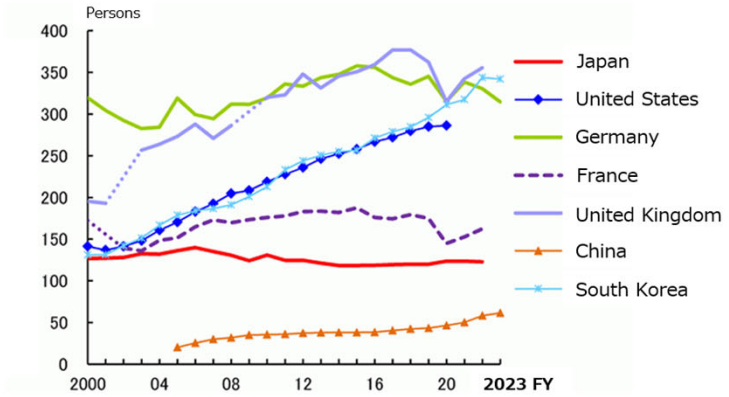
Creation

- **To promote the spread and practice of intellectual property (IP) creation education, broadly support the development of an IP mindset among students.**
- Leverage the outcomes of the Osaka-Kansai Expo to **disseminate and raise awareness of intellectual property utilization in activities aimed at resolving social issues.**
- **With a view to securing excellent young talent, consider strengthening collaboration with overseas universities, attraction initiatives, and awareness-raising activities.**

Current Status and Challenges

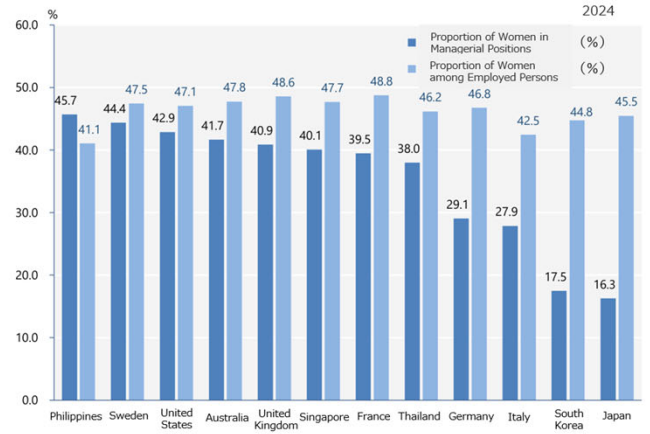
○ **Creative human resources, such as researchers and doctoral human resources, are the core contributors that support the strengthening of Japan's industrial competitiveness and the resolution of social issues**, serving as the source of intellectual property creation and innovation.

○ **It is indispensable for continuously enhancing intellectual property creation capacity to pursue, in an integrated manner,** the quantitative securing and qualitative advancement of creative human resources, as well as **ensuring diversity,** including women and foreign nationals.



(Source) National Institute of Science and Technology Policy (NISTEP), "Science and Technology Indicators 2025"

Number of Doctorate Holders per Million Population in Major Countries



"Databook of International Labour Statistics 2025"

Percentage of Women Among Employed Persons and in Managerial Positions

Future Plans (Direction)

○ To promote the spread and practice of intellectual property creation education, we will broadly support **the development of an IP mindset** among students and learners across all aspects of IP creation, protection, and utilization **through initiatives such as the "IP Capability Development School Support Program."**

○ We will advance efforts **to implement locally the support know-how and related expertise** for startup companies, non-profit organizations, individuals, and others seeking to address social challenges through IP utilization—as disseminated at the Osaka-Kansai Expo—while also promoting awareness and understanding of **IP utilization in activities aimed at resolving social challenges.**

○ In order to secure **talented young professionals, including graduates from top universities in Southeast Asia, India, and other regions,** we will strengthen **collaboration with local universities through the use of internships and other means,** and will examine measures to enhance recruitment efforts—including the utilization of the Highly Skilled Foreign Professional Point-Based System **following further refinement and acceleration of screening processes—**as well as **efforts to raise awareness among companies and highly skilled foreign nationals.**

Prevention of Technology Leakage

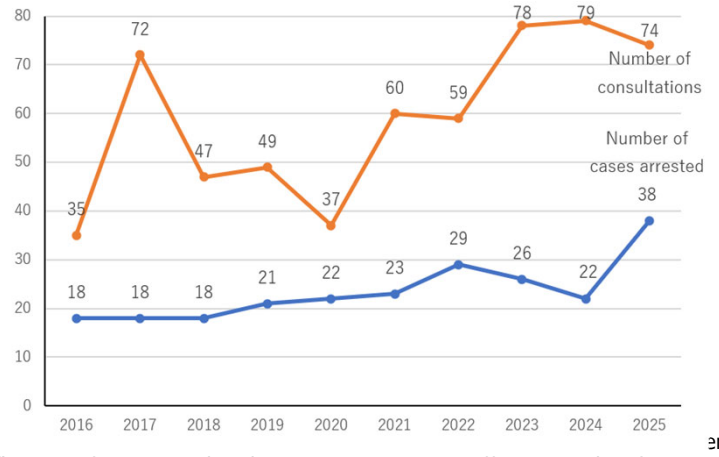
Protection

- Against the backdrop of heightened geopolitical tensions and intensifying competition among nations, the risk that **Japan's superior technologies and research outcomes may unintentionally flow overseas,** causing serious impacts on national security and industrial competitiveness, has further increased. In response, **awareness-raising efforts will be implemented to prevent the leakage of trade secrets.**
- While the internationalization and openness of research activities are indispensable for the advancement of science, technology, and innovation, **risks of unintended technology transfer and undue foreign influence have become apparent. Efforts to ensure research security and research integrity will therefore be promoted.**

Current Status and Challenges

○ The number of consultations received by the police regarding trade secret infringement cases has exceeded 70 for three consecutive years. The number of cases investigated reached 38 in 2025 (a 73% increase from the previous year). Against the backdrop of increased labor mobility and the expansion of international business activities, **companies and research institutions are increasingly facing risks of trade secret leakage.**

○ **It has been pointed out that research results and technical information may be utilized in ways that were not originally anticipated.** In addition to conventional export controls, **new measures are needed that take into account the risk of military diversion over time and changes in business structures.**



ency's "Status of Arrests Related to Economic Crimes Affecting Daily Life in 2025"

Trends in the Number of Cases Investigated and Consultations Received Regarding Trade Secret Infringement Offenses

Future Plans (Direction)

○ We will **examine the appropriate framework for the regulation of trade secrets under the Unfair Competition Prevention Act** from the perspectives of victim relief and prevention of leakage overseas, and will continue **to promote awareness toward the prevention of trade secret leakage** by disseminating the “Management Guidelines for Trade Secrets" in addition to the "Handbook for Protection of Confidential Information" and "What You Should Know about Trade Secrets."

○ Based on the "Procedures for Initiatives to Ensure Research Security" (December 2025) and other relevant documents, we will **promote initiatives related to ensuring research security and research integrity** at the government, funding agencies, and research institutions.

Strengthening Measures Against Piracy and Counterfeit Goods

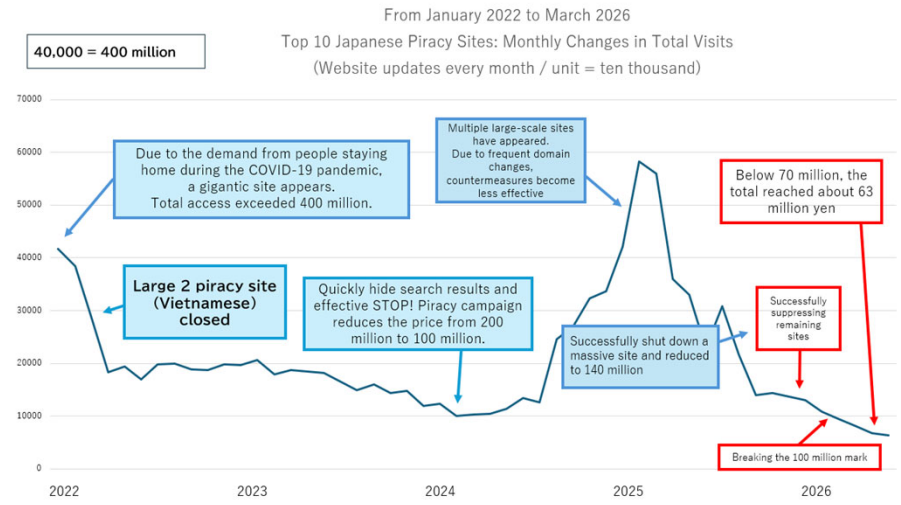
Protection

- **As damage from overseas piracy sites continues to expand and methods become increasingly sophisticated**, we will **strengthen countermeasures in a unified public-private effort** through close coordination and information sharing with the private sector and concerned governemt ministries and agencies.
- **In response to the new threat of counterfeit goods distribution exploiting SNS and other deceptive advertising used in fraudulent schemes,** we will advance **effective countermeasures targeting SNS platform operators** and promote efforts including **international cooperation.**

Current Status and Challenges

○ Content such as manga, anime, games, and films from Japan has attracted global attention due to its high appeal, and infringement of copyrights and other related rights has expanded across borders. While the monthly access count to the top 10 piracy sites targeting Japan fell below the 100 million mark, it remains at a high level. **Addressing online piracy, which knows no borders, is difficult through private-sector efforts alone,** making it essential to strengthen **international cooperation and international enforcement led by the government,** and it is necessary to **advance countermeasures through public-private collaboration.**

○ There has been a sharp increase in **"deceptive redirect advertisements," which exploit targeted advertising to impersonate genuine products and lure consumers into purchasing counterfeit goods**. Because advertisements are displayed in a personalized manner optimized for individual users, it is difficult for rights holders to identify and remove them, and such schemes can escalate beyond counterfeit goods damage into consumer harm such as phishing scams.



(Source) Association for Building Legal digital contents (ABJ), "Status of Illegal Sites for Publications," https://www.abj.or.jp/data

Future Plans (Direction)

○ Through the Public-Private Practitioners' Liaison Meeting on Countermeasures against Piracy and Other Issues, the government and private sector will work together to **advance initiatives based on the "Comprehensive Countermeasure Menu and Roadmap for Online Piracy."**

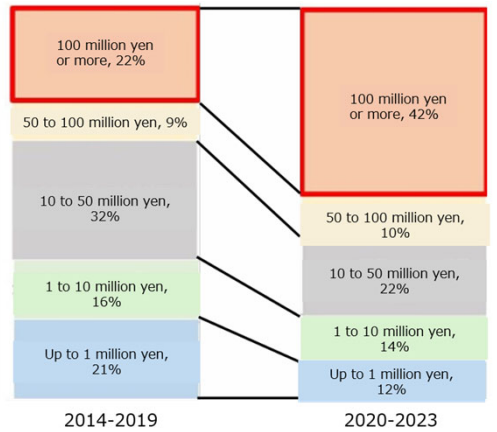
○ In order to address piracy damage originating from overseas, the government and private sector will work together on **awareness-raising activities in relevant countries, strengthening country-specific countermeasures, enhancing international cooperation and enforcement including with law enforcement agencies, supporting rights holders in exercising their rights, and promoting the distribution of legitimate versions** (including expanding distribution and distribution platforms and supporting the development of translation personnel).

○ The government will **promote awareness-raising and information dissemination both domestically and internationally regarding intellectual property rights infringements caused by deceptive fraudulent advertisements on SNS and other online platforms.**

- ◆ With a view to establishing an environment that enables prompt and appropriate resolution of disputes when rights infringement occurs, **institutional arrangements to deter infringement shall be examined**.
- ◆ With a view to realizing strategic intellectual property management that contributes to social implementation, **consideration shall be given to requiring the submission and reporting of intellectual property-related status** in applications and reports for publicly funded research grants, in accordance with the objectives of the respective programs.

Current Status and Challenges

- ○ For the industrial property rights system to function effectively, it is essential to create an environment that enables **prompt and appropriate dispute resolution when infringement occurs,** while also **deterring such infringement.**
- ○ With regard to disputes over standard essential patents (SEPs), there is a tendency for such disputes to become increasingly complex and prolonged in relation to international business activities. It is therefore important for Japan to advance **the development of a highly predictable and effective environment for SEP dispute resolution and system operation,** while closely monitoring **international discussions and developments in practice.**
- ○ In order to secure competitive advantage in the global market, **strategic intellectual property management that contributes to social implementation**—including reduction of infringement risks through prior art searches from the early stages of research and development, and timely and appropriate acquisition of intellectual property rights—is indispensable. It is important to promote the creation, protection, and utilization of intellectual property rights that are strong in both quality and quantity.



(Source) Prepared by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters, based on "Hoso Jiho" published by Hoso-kai

Amount of damages awarded in lawsuits for damages related to patent infringement(Tokyo District Court / Osaka District Court)

Future Plans (Direction)

- ○ Based on analysis of court cases and other evidence regarding the effectiveness of amendments to the Patent Act and other laws concerning methods for calculating damages, further analysis of the actual state of infringement shall be conducted, and **the appropriate form of civil remedies to ensure recovery of damages and disgorgement of infringer's profits shall be examined**, and necessary measures shall be taken.
- ○ In order to develop an environment in which rights holders can effectively enforce their rights, **the appropriate form of strengthening and enhancing evidence collection procedures, including the investigation system, shall be examined, and necessary studies shall be conducted regarding the possibility of extending such procedures to copyrights and trade secrets, as well as approaches to handling evidence located overseas.**
- ○ **Mechanisms to enable collective and organized enforcement of intellectual property rights shall be examined.**
- ○ **With respect to publicly funded research grants**, in accordance with the purpose of the relevant programs, consideration shall be given to requiring applicants to report on **their intellectual property status, including prior art searches and the status of intellectual property strategy formulation at their affiliated institutions, at the time of application,** so that such information may be used as a reference in the evaluation of research project selection, and to requiring applicants to report on the status of intellectual property-related efforts in their results reports as well.

Protection of Intellectual Property in Local Regions

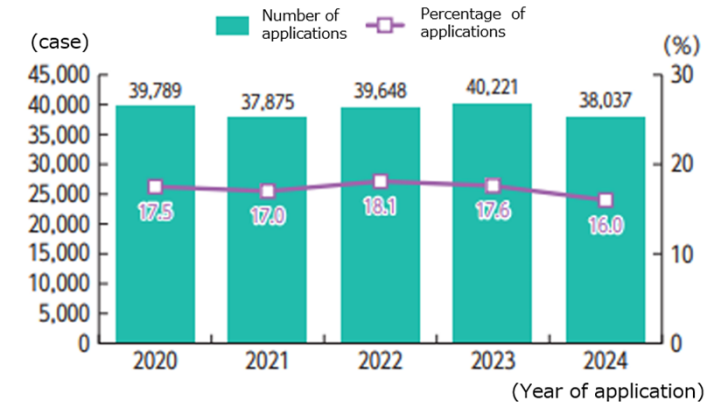
Protection

- To further promote efforts to link intellectual property to management in small and medium-sized enterprises and others, **efficient support from an intellectual property perspective (accompanying support, development of human resources for intellectual property management support, etc.) will be implemented.**
- In order to realize **a virtuous cycle of intellectual property** in which intellectual property related to agriculture, forestry, fisheries, and the food industry leads to monetization and reinvestment, and to **achieve integrated brand protection**, efforts will be made **to develop an environment where farmers and experts can utilize intellectual property in a cross-cutting manner, and to strengthen measures against counterfeit goods.**

Current Status and Challenges

○ While intellectual property (IP) activities by small and medium-sized enterprises (SMEs) and mid-sized enterprises are conducted to a certain extent, only a limited number of companies are continuously leveraging **IP in connection with their management strategies.** Given that SMEs and similar enterprises have limited management resources and human capital, **region-based support is needed to further promote efforts to link IP with business management.**

○ **IP assets such as superior plant varieties and food culture** represent key strengths of the agriculture, forestry, fisheries, and food industries; however, **the risks of overseas outflow and the proliferation of counterfeit products are also growing.** It is necessary to deter unauthorized cultivation of superior varieties while channeling licensing revenues back into variety development, as well as to strengthen measures against counterfeit products and to protect and leverage brands that draw on local resources.



(Source) Japan Patent Office, "Annual Report on Patent Administration 2025"

Trends in Patent Applications by Small and Medium-sized Enterprises

Future Plans (Direction)

○ Through the Intellectual Property Management Support Network, **provide efficient support (accompanying support, development of human resources for intellectual property management support, etc.) from an intellectual property perspective in response to management consultations and other issues faced by SMEs and small-scale business operators.**

○ In light of cases where SMEs and small-scale business operators suffer intellectual property infringement in their business relationships with large enterprises and others, **work on establishing a system to strengthen infringement deterrence for SMEs and others.**

○ With a view to strengthening intellectual property management capabilities across the agriculture, forestry, fisheries, and food industries as a whole, **work on raising awareness through seminars and other means, and take measures toward the protection and utilization of intellectual property** through the "Agricultural Intellectual Property Comprehensive Support Desk," which matches field operators with expert human resources to provide advice.

○ In order to prevent the outflow of superior varieties overseas and generate earnings from abroad, **establish and operationalize a variety rights management organization this summer.**

○ **Accurately grasp the actual situation of counterfeit goods overseas and respond appropriately,** while promoting **model initiatives to protect and utilize brands through GIs, trademarks, and other means.**

Promoting Social Implementation through Industry-Academia Collaboration

Utilization

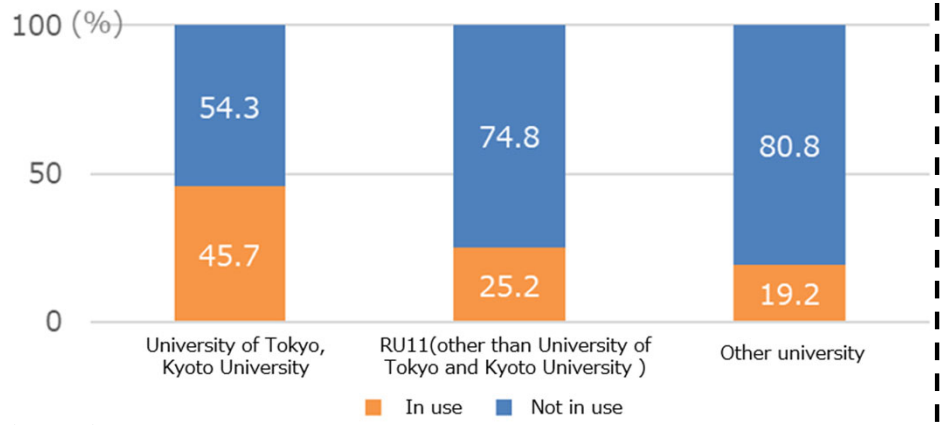
◆ To maximize opportunities for social implementation of university intellectual property and promote a virtuous cycle of funding, efforts will be made to promote **the penetration of the University Intellectual Property Governance Guidelines (hereinafter referred to as "University IP GL")** and **to grasp the actual state of industry-academia collaboration, and necessary measures such as the collection, analysis, and publication of best practices will be examined.**

Current Status and Challenges

○ As the closer relationship of science and business accelerates, it is important to advance **innovation ecosystems that include universities and national research institutions.**

○ In order to maximize opportunities **for the social implementation of university intellectual property**, a number of challenges remain, including insufficient penetration of the University IP Guidelines among university management, **a shortage of IP-related funding and specialized human resources** particularly at small and medium-sized universities, and inadequate dissemination and awareness **of the "Guidelines for Handling of Intellectual Property upon the Transfer or Retirement of University Researchers" and its case studies.**

○ Regarding KPIs, while the target is set as "supporting the maximization of opportunities for social implementation of intellectual property through the dissemination of the University IP Guidelines (tracking social implementation cases and their status)," there remains significant room to **expand opportunities for social implementation,** given that approximately 80% of patents held by many universities are currently unused.



(Source) Prepared by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters based on the Ministry of Education, Culture, Sports, Science and Technology "Survey on the Status of Industry-Academia Collaboration at Universities and Other Institutions in FY2024"

Status of Utilization of University-Held Patents

Future Plans (Direction)

○ To enhance the effectiveness of guidelines such as the University Intellectual Property GL and the guidelines on handling intellectual property when university researchers change or leave their positions, we will **continue to analyze issues and examine countermeasures through exchanges of opinions, and consider necessary response measures.**

○ We **will support industry-academia collaboration through multifaceted intellectual property support** in areas such as human resources, funding, and awareness-raising.

- Human Resources: Dispatching "Intellectual Property Strategy Producers," experts in intellectual property management, to universities and other institutions (iAca)
- Funding: Subsidizing costs for foreign patent applications and overseas infringement countermeasures for SMEs, startups, universities, and other institutions
- Awareness-Raising: Promoting and revising OI model contracts, and raising intellectual property awareness among researchers
- Intellectual Property Utilization: Creating matching opportunities through outreach and hearings in conjunction with the renewal of the open patent database

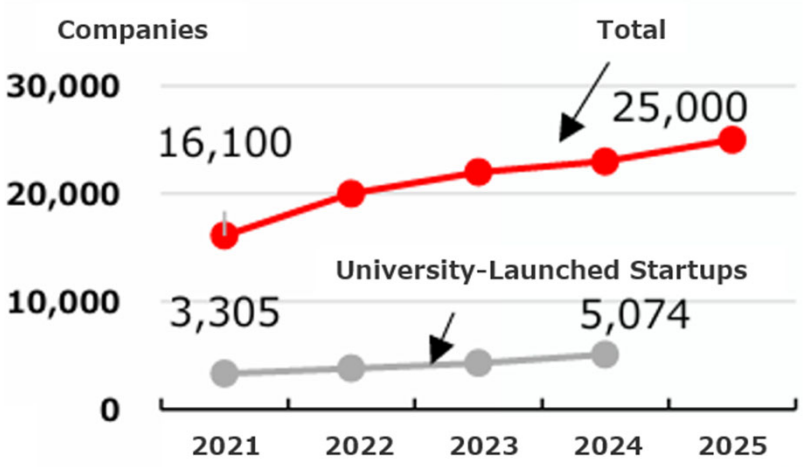
Startup Support

Utilization

◆ We will promote the development of an environment in which startups (hereinafter referred to as "SUs") can **utilize intellectual property as a management resource,** by deploying multifaceted IP-related support measures, including the dispatch of IP specialists, information dissemination, and interviews during the examination stage.

Current Status and Challenges

- ○ The number of startups (SUs) is increasing, and the SU ecosystem is steadily expanding its base.
- ○ Intellectual property held by SUs with advanced technologies is a core management resource for securing technological superiority and attracting investment and business partnerships.
- ○ **SUs find it difficult to fully formulate IP strategies, acquire and manage rights, and build governance frameworks due to constraints in human resources and funding.**
- ○ In order to make public procurement an attractive market for SUs through appropriate IP protection, it is necessary to promote the "Guidelines on Protection of Intellectual Property and Procurement Innovations in Cases of Public Procurement from SUs and Others."
- ○ Regarding KPIs, while the KPI is set as "promoting SU development through IP-related support measures for SUs (including monitoring of support satisfaction levels and case studies)," in the FY2025 satisfaction survey conducted under IPAS, all 22 companies that received support responded that they were satisfied (support track record: 18 companies in FY2024, 22 companies in FY2025).



(Source) METI, Materials from the 2nd Startup Policy Promotion Subcommittee

Number of Startups in Japan

Future Plans (Direction)

- ○ Through IPAS, teams of **intellectual property strategy producers** composed of business experts and intellectual property specialists will be dispatched to **startups in their founding stage.**
- ○ **Patent attorneys, lawyers, and other intellectual property experts** will be dispatched to **venture capital firms** to strengthen support for building intellectual property strategies for startups.
- ○ In order to promote innovation by startups and others, the Japan Patent Office will support startups and others in **smoothly and effectively acquiring rights in line with their business strategies** through interviews and other means during the examination stage.

Promotion of the “New International Standards Strategy”

Utilization

- **Promote international standardization integrated with growth strategies and research and development** based on **the Public-Private Investment Roadmap and the Science, Technology and Innovation Basic Plan.**
- **Promote the utilization of standards in public procurement** as a leading example by the government, as well as **the utilization of standards and certification in regulations and rules.**
- **Establish new key KPIs** for grasping international standardization activities across Japan.

Current Status and Challenges

- ○ Based on the "New International Standards Strategy" formulated in 2025, monitoring of international standardization trends at home and abroad, as well as follow-up on the initiatives and strategies of concerned government ministries and agencies and efforts in key areas, were conducted.
- ○ As a result, progress was observed in specific initiatives by concerned government ministries and agencies, such as strengthening industry-academia-government-finance collaboration and reinforcing the standardization ecosystem (including the expansion of personnel evaluations for international standardization activities at national research and development agencies and the establishment of the Public-Private High-Level Forum). Progress was also recognized in international standardization efforts, particularly in strategic areas. On the other hand, in the former case, coordination across ministries and agencies and across areas remained weak, while in the latter case, some important areas saw insufficient progress.
- ○ Internationally, the advancement of AI and digitalization has given rise to a situation in which the very nature of regulations, standards, and certification is being called into question.
- ○ Furthermore, since the existing KPIs set for individual initiatives have proven insufficient for capturing Japan's overall international standardization activities, the following two indicators will be newly established as key KPIs going forward: **"① Number of secretariat positions held by Japan in ISO/IEC (maintaining a position within the top five by FY2030)" and "② Number of international standards and rules in key/strategic areas and the 17 strategic fields that Japan has led in proposing, as well as the number that have been established as international standards and rules (※)."**
  (※) It should be noted that what is essential is to strategically lead the formation of international standards and rules that are advantageous to Japan, taking into account Japan's strengths and other factors, and that evaluation should not be based solely on the number of proposals or established standards.



Public-Private High-Level Forum on International Standards General Assembly (2nd Session)

Future Plans (Direction)

- ○ **Align research and development, intellectual property, standardization, and business strategies** in coordination with Japan’s Growth Strategy and the 7th Science, Technology and Innovation Basic Plan. In doing so, build **international standardization into the Public-Private Investment Roadmap** to promote standardization activities.
- ○ Strengthen the **coordination and oversight** function of the Public-Private High-Level Forum on International Standards. Furthermore, examine the establishment of **an organization that can exercise a coordination and oversight function at a higher level within the government and oversee standardization measures across the entire government on a cross-cutting basis (such as a Director-General for International Standardization** (tentative name)).
- ○ Advance human resource development **through appropriate personnel evaluation in industry and academia, utilization of AI and digital technologies in standardization, strengthening of specialized services, utilization of standards in public procurement, and development of guidelines for the use of standards and certification in legal systems and voluntary rules.**
- ○ Promote international standardization through the establishment of methodologies and KPIs for securing key posts, as well as through international research and development cooperation.
- ○ Through the presentation of models and other means, advance **the building of public-private collaboration frameworks for international standardization in each domain and the formulation of international standardization strategies.** In particular, promote concrete international standardization efforts encompassing the 61 technologies and products included in the 17 strategic fields.
- ○ **Examine KGIs, consider cross-domain rules and standardization integrating entire systems and multiple systems**, and implement **more efficient and effective monitoring and follow-up, including for the defense industry and content industry.**

Development of Environment for Data Distribution and Utilization

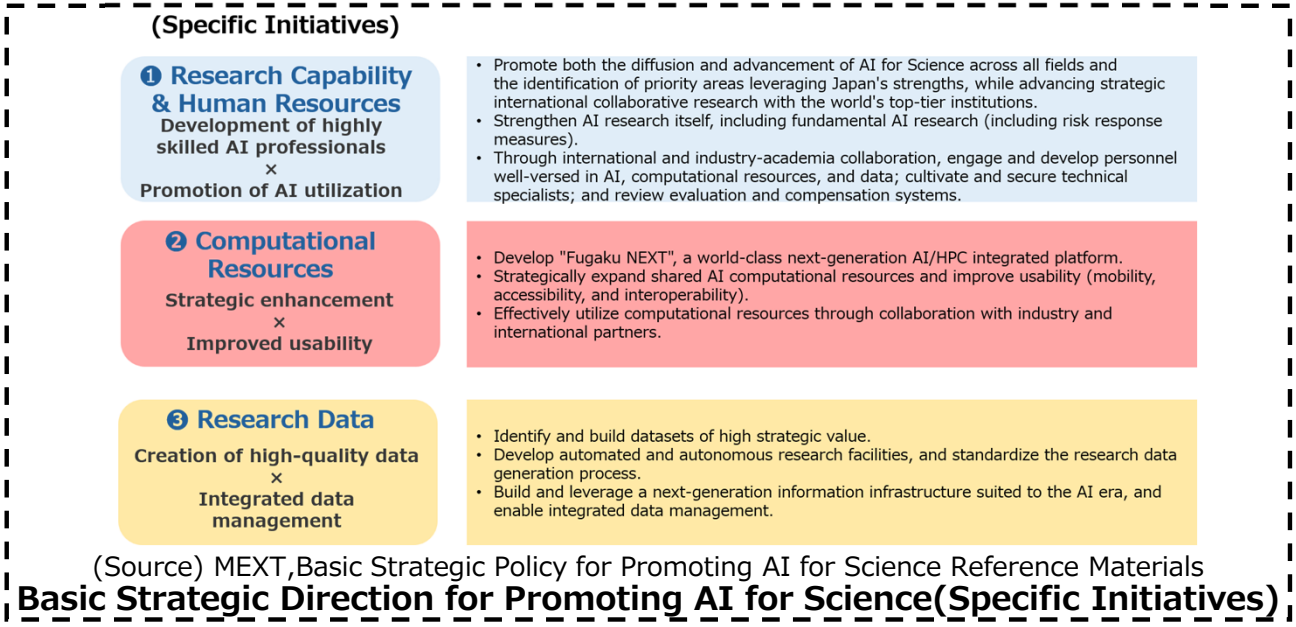
Utilization

◆ Based on the "Basic Policy on the Approach to Data Utilization Systems" and other relevant frameworks, **promote the development of an environment for data utilization in research, agriculture, healthcare, disaster prevention, and other fields.**

Current Status and Challenges

○ In light of the Basic Policy on the Approach to Data Utilization Systems (June 2025**), bills to amend the Digital Administration Promotion Act and the Act on the Protection of Personal Information, among others, were submitted to the Diet** in order to promote the development of an environment that achieves both the protection and utilization of data containing personal information.

○ The 7th Science, Technology and Innovation Basic Plan (March 2026) **designates AI for Science as a key theme,** and the framework for the management, utilization, and distribution of research data underpinning AI for Science is scheduled to be compiled by June.



(Source) MEXT,Basic Strategic Policy for Promoting AI for Science Reference Materials

Basic Strategic Direction for Promoting AI for Science(Specific Initiatives)

Future Plans (Direction)

○ **Promote the examination of research data management, utilization, and distribution to support AI for Science**, and advance the enhancement of research data infrastructure NII RDC and distribution infrastructure SINET, along with the development of an environment capable of continuously generating high-quality and large volumes of data.

○ **Promote the sharing and utilization of agriculture-related data** through the development of open APIs for agricultural machinery and the creation of new services leveraging previously developed open APIs.

○ **Advance the development of the "Electronic Medical Record Information Sharing Service"** for sharing necessary medical information of patients among medical institutions and other entities, and **examine the path toward nationwide operation launch targeted for around winter of fiscal year 2026.**

○ Organize information-sharing rules for the new Comprehensive Disaster Prevention Information System (SOBO-WEB) as regulations, **and examine the promotion of data distribution in the disaster prevention field, including coordination with the Digital Agency's data linkage infrastructure and standardization of distributed data.**

Promotion of Cool Japan Strategy

CJ

- **The scale of overseas expansion of Cool Japan-related industries** aims to grow **to over 50 trillion yen by 2033,** with a target of **increasing the proportion of Japan fans by 10 percentage points.**
- To further promote overseas expansion, efforts will be made to strengthen **collaboration between content and other industries,** as well as to advance overseas expansion models that bring together **regions and industries.**

Current Status and Challenges

- The total overseas expansion of Cool Japan-related industries amounts **to 30.7 trillion yen, an increase of 3.6 trillion yen (13.42%) from the previous actual figure.** Meanwhile, **in dollar terms**, the total stands at **203 billion US dollars, an increase of 16 billion US dollars (8.48%) from the previous figure.**
- The proportion of people who consider Japan their "favorite country" stands at **58.1% on average across all countries and regions worldwide,** 70.8% on average in Asia, and 33.3% on average in Europe, the United States, and Australia.

Overseas Expansion of Cool Japan-Related Industries

		Yen-based (trillion yen)			US dollar-based (Ten billion dollars)		
		Intellectual Property Strategic Program2026	Intellectual Property Strategic Program2025	Change (%)	Intellectual Property Strategic Program2026	Intellectual Property Strategic Program2025	Change (%)
Overseas expansion of content (overseas market size)		6.1 (2024)	5.8 (2023)	6.11	4.0 (2024)	4.1 (2023)	-1.54
Amount of travel spending by foreign visitors to Japan (inbound tourism)		9.5 (2025)	8.1 (2024)	16.36	6.3 (2025)	5.4 (2024)	17.69
Food	Export value of agricultural, forestry and fishery products and food	1.7 (2025)	1.5 (2024)	12.83	1.1 (2025)	1.0 (2024)	14.12
	Sales of local subsidiaries of food manufacturers	8.7 (2024)	7.3 (2023)	18.74	5.8 (2024)	5.2 (2023)	10.21
Fashion	Export of textiles and textile products	1.1 (2024)	1.0 (2023)	11.31	0.7 (2024)	0.7 (2023)	3.31
	Overseas sales of major fashion manufacturers	2.1 (2024)	1.8 (2023)	17.47	1.4 (2024)	1.3 (2023)	9.03
Cosmetics	Export of cosmetics	0.5 (2024)	0.6 (2023)	-14.17	0.3 (2024)	0.4 (2023)	-20.34
	Overseas sales of major cosmetics manufacturers	1.0 (2024)	1.0 (2023)	4.67	0.7 (2024)	0.7 (2023)	-2.86
合 計		30.7	27.1	13.42	20.3	18.8	8.48

Future Plans (Direction)

- We will promote the **deepening and nationwide dissemination of initiatives at content regional revitalization bases** in collaboration with concerned government ministries and agencies, as well as efforts for overseas expansion through **strengthened collaboration with content, such as the issuance of currency featuring content and content × food.**
- For example, we will bundle various regional products and services, including the holding of international textile trade fairs, and develop them as a new Japanese value system, promoting **overseas expansion models based on co-creation and collaboration,** as well as **overseas expansion models that bring together regions and industries.**
- We will promote the linkage between inbound tourism and exports, the creation of experiential value sought by the world, and high value-added approaches, while working to **build a global supply chain** through brand strategy and localization. We will also promote efforts to address risks arising from the international political and economic situation and to strengthen overseas communication capabilities with a view to expanding the base of Japan fans worldwide.

Promotion of Content Strategy

CJ

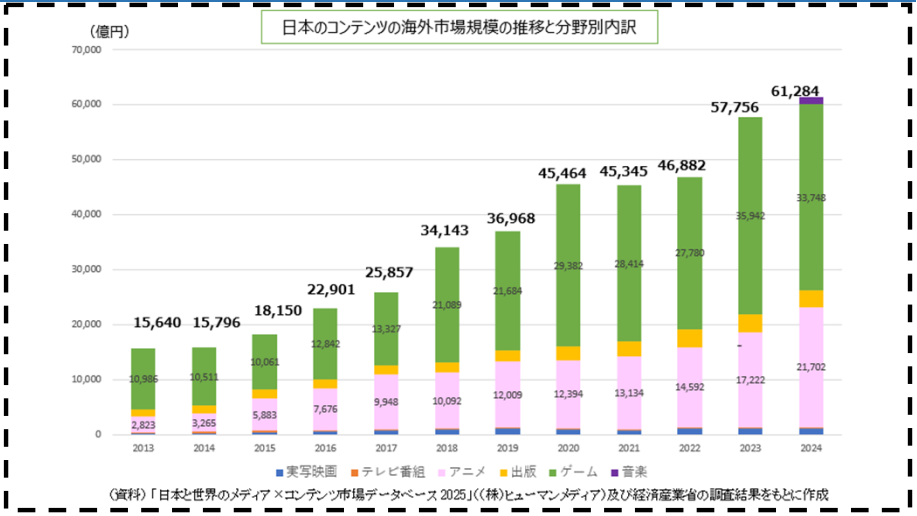
◆ In order to achieve **the target of expanding the overseas market size of Japan-originated content to 20 trillion yen by 2033**, and to ensure that Japan is not placed at a competitive disadvantage internationally, the government will formulate a "Content Sector Public-Private Investment Roadmap" and, based on this roadmap, **promote large-scale, long-term, and strategic public-private investment including multi-year support,** while expanding growth investment to facilitate overseas expansion.

Current Status and Challenges

○ **The overseas market size of Japanese content stands at 6.1 trillion yen** (2024), surpassing the steel industry and exceeding the export value of the semiconductor industry.

○ At the first meeting of the Japan Growth Strategy Headquarters held last November, **"Content" was designated as one of the 17 strategic fields under "Crisis Management Investment" and "Growth Investment."**

○ Expanding business development capabilities overseas, structural reforms to adapt to digital business, and strengthening human resources to support the content industry remain significant challenges.



Future Plans (Direction)

○ **A new integrated support system will be established** to optimize overall budget allocation, centralize budget execution, and bring together the wisdom of both the public and private sectors.

○ To promote the overseas expansion of the content industry, support will be provided for **the creation of new IPs, production of large-scale works, expansion of distribution platforms, development of development platforms, localization (including translation) and promotion for overseas markets,** while also addressing **piracy countermeasures.**

○ Through the "Creator Support Fund," support will be provided throughout the process from production to dissemination, fostering innovative creators and global business human resources responsible for overseas expansion, while also supporting collaboration between educational institutions and industry to develop human resources engaged in production operations.

○ **The concept of "National Center for Media Arts" (tentative name)**—equipped with functions for collecting, preserving, and digitizing intermediate production materials, as well as research functions for surveys, research, and human resource development, and functions for information dissemination, exhibition, and utilization—**will be realized through public-private collaboration.**

○ Based on the **"Digital Archive Strategy 2026-2030," achievement targets will be set** for government-related archival institutions and Japan Search, **and follow-up will be conducted.**

Structure of the Intellectual Property Strategic Program 2026

0. Future Direction of Intellectual Property Strategy

1. “Creation” of Intellectual Property

- ○ Value Creation through Investment in Intellectual Property and Intangible Assets
- ○ AI and Intellectual Property Rights
- ○ Strengthening Creative Human Resources and Achieving Diversity

2. “Protection” of Intellectual Property

- ○ Prevention of Technology Leakage
- ○ Strengthening Measures against Piracy and Counterfeits
- ○ Strengthening the Industrial Property Rights System and Its Operation
- ○ Protection of Intellectual Property at the Regional Level

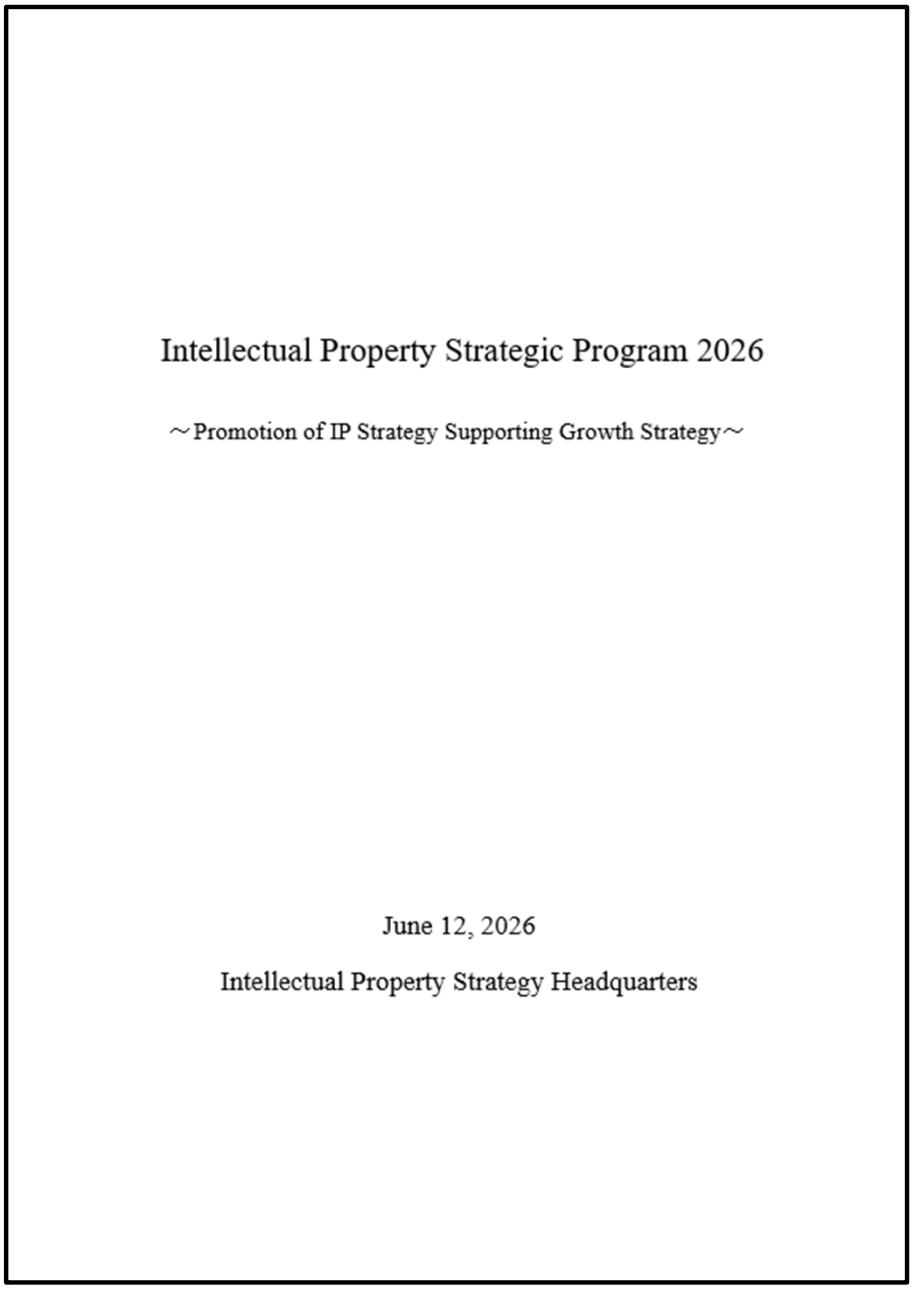
3. “Utilization” of Intellectual Property

- ○ Promoting social implementation through industry-academia collaboration
- ○ Supporting startups
- ○ Promoting new international standardization strategies
- ○ Developing an environment for data distribution and utilization

4. Follow-up on New Cool Japan Strategies

- ○ Promotion of Cool Japan Strategy
- ○ Promotion of Content Strategy

(Annex) Results of the Fiscal Year 2025 Follow-up Based on the “New International Standardization Strategy"


Intellectual Property Strategic Program 2026

～Promotion of IP Strategy Supporting Growth Strategy～

June 12, 2026

Intellectual Property Strategy Headquarters