Provisional Translation

Intellectual Property Strategic Program 2026

～Promotion of IP Strategy Supporting Growth Strategy～

June 12, 2026

Intellectual Property Strategy Headquarters

Intellectual Property Strategic Program 2026

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I. Introduction

The Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters has been promoting relevant measures in cooperation with related ministries and agencies, based on the "Intellectual Property Strategic Program 2025" and the "New International Standardization Strategy" decided by the Intellectual Property Strategy Headquarters in June 2025. Since November 2025, the Secretariat has been vigorously deliberating on the formulation of the "Intellectual Property Strategic Program 2026" within the "Concept Committee" established under the Intellectual Property Strategy Headquarters, and has been conducting specific discussions in the "Content Strategy Working Group," the "New Cool Japan Strategy Working Group," and the "International Standards Strategy Subcommittee" established under the Committee.

In addition, taking into account the recent advances in technologies such as AI and the growing recognition of the importance of management that leverages intellectual property, specialized discussions on intellectual property strategy have been conducted from expert perspectives in various fields, including the "Study Group on Intellectual Property Rights in the Age of AI" and the "Study Group on Effective Disclosure and Governance of Intellectual Property Investment and Utilization Strategies."

Based on the outcomes and discussions of these deliberations, the "Intellectual Property Strategic Program 2026" has been compiled.

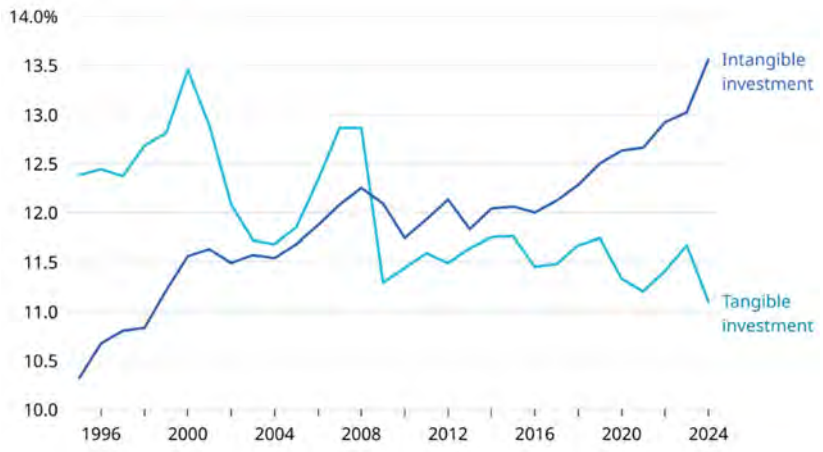
In this Program, "II. Future Direction of Intellectual Property Strategy" confirms the current state of intellectual property affairs in Japan and abroad, and sets out the importance of the following five pillars in advancing the intellectual property strategy toward strengthening Japan's international competitiveness and resolving social challenges: "Further Promotion of Corporate Management and National Strategy with Intellectual Property and Intangible Assets at the Core," "Protection of Intellectual Property Suited to the New Era of Generative AI," "Promotion of International Standards Strategy in Tandem with Growth Strategy," "Promotion of Content Strategy through Growth Investment," and "Strengthening Overseas Expansion of Cool Japan to Drive Earning Power."

"III. Priority Measures for Intellectual Property" continues from 2025 in organizing "Current Status and Challenges" and "Policy Directions" from the perspectives of "Creation," "Protection," and "Utilization" of intellectual property, with a view to advancing new intellectual property initiatives that reflect the progress of technologies such as AI and the latest domestic and international circumstances surrounding Japan, while also conducting follow-up on targets and goals to be achieved.

II.Future Direction of Intellectual Property Strategy

1. Basic Recognition

Investment in intellectual property and intangible assets plays an important role in realizing a high value-added economy. Technologies and intellectual property held by companies directly contribute to differentiation from competitors' products and services and to enhancing added value, thereby playing a central role in value creation in business activities. In recent years, investment in intangible assets has been increasing rapidly worldwide, and since 2008, the share of intangible asset investment in GDP has exceeded that of tangible asset investment. The gap has continued to widen since then, and intangible asset investment is considered to be a driving force of global economic growth (Figure 1).



(Source) WIPO "World Intangible Investment Highlights 2025"

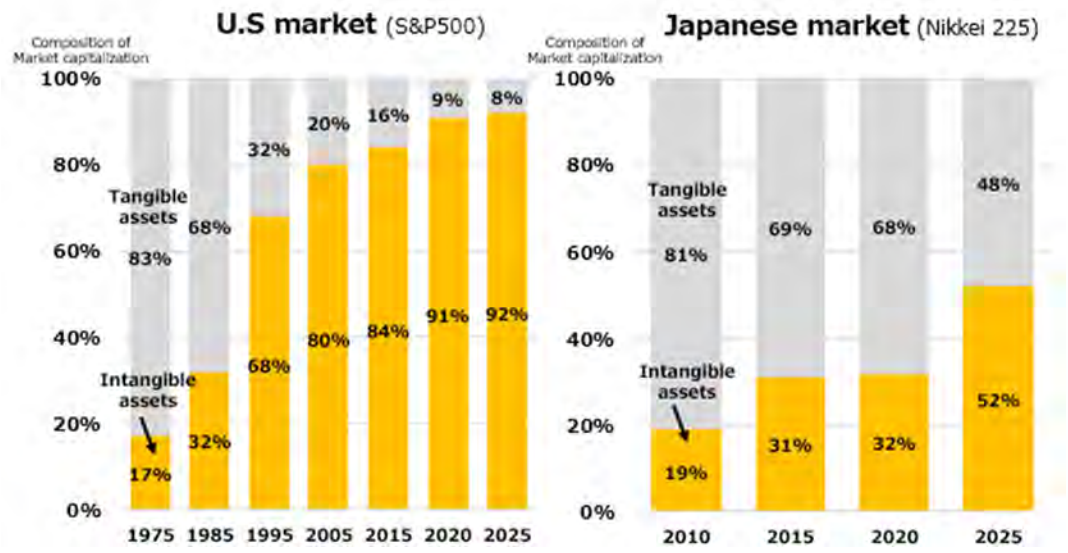
Figure 1: Trend in intangible and tangible investment as a share of GDP (%), 1995–2024[1]

In particular, in the U.S. market, intangible assets account for more than 90% of market capitalization, making them the source of corporate value. In Japan, which faces population decline due to a declining birthrate and aging population, superior intellectual property and intangible assets are important factors for enhancing competitiveness, and it is essential to convert Japan-originated innovation and content into earning power in global markets.

In Japan as well, in order to promote investment in intellectual property and

[1] Investment figures are expressed in the 2020 fixed prices adjusted for purchasing power parity (PPP) and aggregated across the following economies: Brazil, EU-22, India, Japan, the United Kingdom, and the United States. The data coverage varies by country: Brazil (2010–2021), India (2011–2022), and Japan (2013–2023). EU-22 comprises Bulgaria, Croatia, the Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Luxembourg, the Kingdom of the Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, and Sweden.

intangible assets, the "Intellectual Property Strategic Program 2025" set a medium- to long-term KPI (hereinafter "KPI") of "raising the ratio of intangible assets to market capitalization in the Japanese market (Nikkei 225) to 50% or more by 2035." In 2025, the ratio of intangible assets of Japanese companies reached 52%, rising approximately 20 percentage points compared to 2020, thereby achieving this KPI. It has been suggested that this increase in the ratio of intangible assets may have been primarily driven by the governance reforms of the Tokyo Stock Exchange and the Stewardship Code. However, the ratio remains far lower than that of the United States, and it remains important for Japan to continue improving intellectual property awareness among companies to encourage investment in intellectual property and intangible assets, and to promote management practices that leverage international standardization and other means to differentiate products and services and enhance added value (Figure 2).



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

Figure 2: Ratio of Intangible Assets to Market Capitalization

Meanwhile, with the rapid evolution of AI, the physical world is being integrated with AI, and labor is being replaced by AI, among other developments, which are likely to bring about major changes in the economy and society, and there is a high possibility that industrial structures will also undergo significant transformation in the near future. In Japan, while the number of innovation and creative human resources is expected to decline due to population decrease, it can be said that a decisive opportunity has arrived to supplement creativity and labor through the active utilization of AI and to update

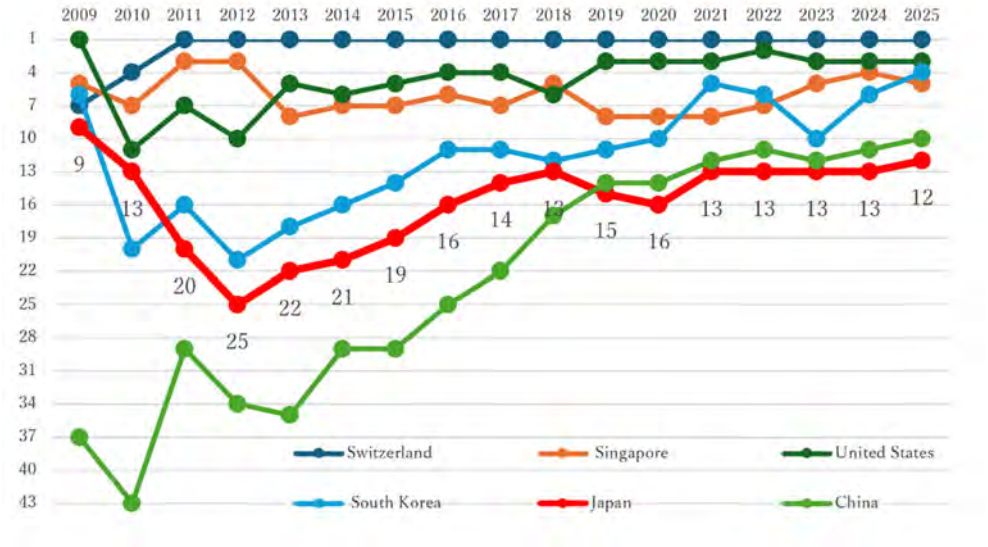
industrial structures. At present, the utilization of AI in Japan has not yet progressed sufficiently, and it is necessary, also from the perspective of intellectual property strategy, to develop an environment that further promotes the utilization of AI.

Furthermore, 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 Japan's superiority in technology and other areas. From the perspective of economic security, it is necessary to take an integrated approach—from research and development to the creation, protection, and utilization of intellectual property, as well as international standards strategy and international rule-making—in order to achieve both the protection and creation of Japan's intellectual property and sensitive technologies.

Moreover, the total overseas market size of Japan-originated content in 2024 reached 6.1 trillion yen, and the total number of inbound visitors to Japan in 2025 exceeded 40 million, with their consumption also reaching 9.5 trillion yen[2]. Japan's content industry and Cool Japan-related industries have grown significantly and are demonstrating their strengths as key industries of Japan. By strengthening strategic support, production environment development, and marketing in these fields through public-private collaboration, it is considered possible to promote Japan's competitive advantage in these fields and make further profits.

It should be noted that the "Intellectual Property Strategic Program 2025" also set a KPI of "aiming to rank within the top four in WIPO's 'Global Innovation Index' by 2035, by accelerating the intellectual creation cycle through promoting investment in intellectual property and intangible assets and advancing the utilization of cutting-edge technologies such as AI." This index rose to 12th place in 2025, up one place from 13th the previous year, but Japan still lags behind the Republic of Korea (4th) and China (10th), and is only halfway to achieving the KPI (Figure 3). Looking at the components of the index, while rankings have improved in three areas—"Institutions," "Human Capital and Research," and "Creative Outputs"—rankings have declined in two areas: "Infrastructure" and "Market Sophistication." In light of these results, it is necessary to continue strengthening efforts toward enhancing Japan's overall innovation capacity.

[2] Transport Policy Council, 54th Tourism Subcommittee (January 30, 2026) Reference Material 2: "Current Status of Tourism"



(Source) WIPO "Global Innovation Index 2025"

Figure 3: Global Innovation Index (GII) Rankings

2. Future Direction

As stated in the Basic Recognition, intellectual property and intangible assets are the source of companies' earning power and, by extension, Japan's growth potential. It is urgent to place intellectual property and intangible assets at the core of corporate management strategies and national strategies in order to enhance the corporate value and competitiveness of Japanese companies and to achieve the sustainable growth of Japan's economy.

In order to accelerate the growth of Japan's economy through the power of intellectual property and intangible assets, it is necessary to strategically pursue the "Creation," "Protection," and "Utilization" of intellectual property and intangible assets—more specifically, to strategically engage in their generation, acquisition, strengthening, protection, and monetization.

Furthermore, the technological innovation currently underway and the rapid social implementation of generative AI have an impact significant enough to bring about major transformations in industrial structures, labor markets, people's lives, and even values. The environment surrounding intellectual property and intangible assets is also subject to major transformation, and responses that anticipate an AI-driven society are necessary. Moreover, the growing importance of economic security in recent years is an important perspective that cannot be avoided when considering intellectual property strategy.

From these perspectives, the following five pillars have been identified as the

direction of future intellectual property strategy. Details of specific initiatives toward realizing these pillars are organized in "III. Priority Measures for Intellectual Property Strategy."

<Further Promotion of Corporate Management and National Strategy with Intellectual Property and Intangible Assets at the Core>

In order to strengthen the competitiveness of companies, it is necessary to promote management practices that leverage intellectual property and intangible assets, including international standardization activities, as well as open and close strategies for the protection and utilization of technology and international standards strategies, so that superior technologies, products, and on-site capabilities can be sufficiently monetized and lead to sustainable growth. On the other hand, investment in and utilization of intellectual property and intangible assets by Japanese companies remain insufficient, and awareness of the importance of intellectual property management has not yet sufficiently permeated. In order to improve this situation, it is necessary to advance efforts to raise awareness among corporate management of the importance of intellectual property and intangible assets, strengthen the involvement of corporate intellectual property departments in management strategies and value creation processes, and develop a common language between management and intellectual property department personnel. To this end, it is required to consider measures to further disseminate and embed the concept of intellectual property management, including the revision of the Intellectual Property and Intangible Asset Governance Guidelines and the issuance of messages conveying the essence of the value of intellectual property and intangible assets to boards of directors and management of listed companies in conjunction with the revision of the Corporate Governance Code, as well as to consider the appropriate form of disclosure regarding intellectual property and intangible assets, including the necessity of disclosure in securities reports and integrated reports, so that the significance of investment in intellectual property and intangible assets and their contribution to value creation can be more easily understood and evaluated by investors.

In national strategy as well, intellectual property and intangible assets are key when drawing up growth strategies. Therefore, in the 17 strategic fields of the Japan Growth Strategy, it is important to identify winning paths utilizing IP landscapes and international standards for each field, to advance concentrated intellectual property investment and intellectual property and intangible asset governance, and to actively utilize intellectual property and international standards as countermeasures against other countries' intellectual property hegemony strategies and intellectual property

infringement risks.

<Protection of Intellectual Property Suited to the New Era of Generative AI >

The rapid evolution of generative AI and technological innovation are bringing about major transformations in the environment surrounding intellectual property. While AI is becoming the foundation driving the global economy, demands for the protection of intellectual property rights are also increasing, and it is required to realize an ecosystem in which technological progress and appropriate protection of intellectual property are compatible.

To this end, based on the philosophy of the "Act on Promotion of Research and Development, and Utilization of Artificial Intelligence-Related Technology" (hereinafter "AI Act"), which holds that it is necessary to promote innovation accompanying the utilization of AI while also addressing its risks, it is necessary to formulate Principle-Code for Protection of intellectual property and transparency for the appropriate use of generative AI (tentative name) for the purpose of ensuring a safe and secure environment for rights holders and users, with a view to achieving compatibility between the promotion of advances in generative AI and the appropriate protection of intellectual property rights, and to promote domestic and international awareness of the same, as well as to promote the construction of a framework that encourages the return of remuneration to creators and others.

Furthermore, the development of AI is giving rise to various challenges in relation to the conventional industrial property rights system, and appropriate responses are needed to address challenges related to AI-assisted inventions and design creation using generative AI. Moreover, as economic security challenges become more complex amid increasingly fierce technological development competition in cutting-edge technologies directly linked to economic security, it is essential to enhance the effectiveness of deterring intellectual property infringement and to develop an environment in which disputes can be resolved promptly and appropriately when infringement occurs. With reference to the situations in other countries, it is required to consider the introduction of civil remedy provisions that ensure recovery of damages and deprivation of infringer profits, the construction of a mechanism that facilitates the exercise of rights by consolidating intellectual property rights held by multiple rights holders, the facilitation of evidence collection by rights holders, the appropriate form of enhancement and strengthening of evidence collection procedures such as the investigation system, and the form of institutional arrangements with a view to the possibility of extending such procedures to copyright and trade secrets, as well as responses to evidence located

overseas.

<Promotion of International Standards Strategy in Tandem with Growth Strategy>

Last June, the "New International Standards Strategy" was formulated for the first time in 19 years, and efforts are being made to strengthen the actors involved in international standardization (cross-cutting initiatives), to select 17 "strategic areas" and "important areas" where international standards can become Japan's winning paths, and to concentrate resources for strategic responses, as well as to advance public-private collaboration, human resource development, and the strengthening of specialized services.

In order to further strengthen efforts going forward, it is necessary to build international standardization for demand and market creation into the Public-Private Investment Roadmaps for the 17 strategic fields selected by the Council for Japan's Growth Strategy established in last November, and to promote international standards strategy in tandem with growth strategy. Furthermore, as AI utilization and digitalization advance in all fields, it is necessary to aim for overall optimization rather than partial optimization, to lead the standardization of Systems of Systems, and to work toward the international deployment of Japan's model as a package.

<Promotion of Content Strategy through Growth Investment>

Content is a field in which significant global growth is expected, and Japan's content industry, which possesses high-quality and diverse content, is a strategic field where further growth is anticipated by capturing the expanding global market. The Council for Japan's Growth Strategy has also selected "Content" as one of the 17 strategic fields in which the government should take action.

In order to achieve the government's target of reaching an overseas market size of 20 trillion yen by 2033, it is required to steadily promote the Public-Private Investment Roadmap for content field. Specifically, in order to eliminate bottlenecks in human resources, production environment, and overseas expansion and distribution, and to enable the industry to achieve autonomous and continuous growth, the government needs to promote large-scale, long-term, and strategic public-private investment through a bold policy package and to expand growth investment. To this end, it is necessary to consider the overall optimization of budget allocation, the unification of budget execution, the construction of a new integrated support system to bring together the wisdom of the public and private sectors, support for the production of large-scale

works, support for the expansion of distribution platforms, overseas expansion and distribution support including anti-piracy measures, flexible multi-year support for the next generation of creators, and human resource support including the promotion of global business human resource development.

<Strengthening Overseas Expansion of Cool Japan to Drive Earning Power>

Inbound visitor consumption expenditure has reached record highs, and in order to continue capturing overseas demand, it is necessary to take region-wide initiatives, including providing high experiential value that maximizes the appeal of history, traditional culture, nature, and other attractions found throughout Japan, and improving the appeal of accommodation and stays. Content also contributes to improving Japan's favorability and to expanding the overseas expansion of various industries, including tourism and food. In order to achieve the government's target of reaching an overseas expansion scale of 50 trillion yen or more by 2033, it is necessary to deepen and expand nationwide the initiatives at content regional revitalization bases, and to work strategically with regions and industries united toward forming Japan fans through inbound consumption and expanding exports.

III.Key Measures of Intellectual Property Strategy

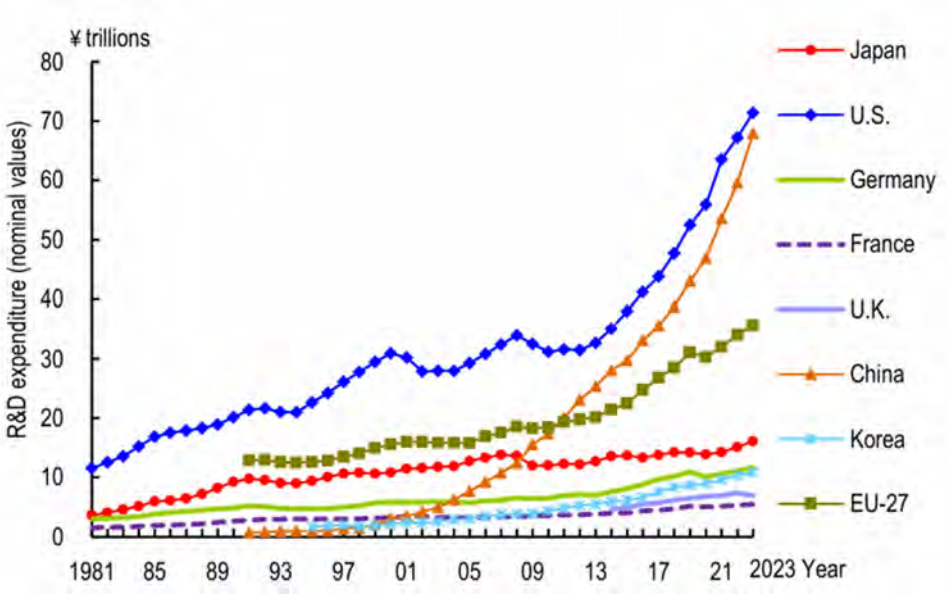
1. "Creation" of Intellectual Property

（1） Value Creation through Investment in Intellectual Property and Intangible Assets

(Current Situation and Challenges)

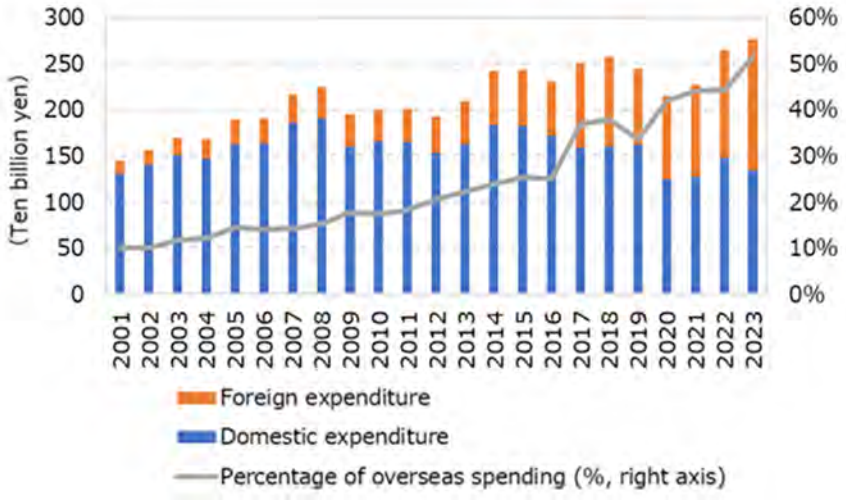
Investment in research and development (R&D) is critically important for achieving sustainable growth and resolving social challenges, and plays a vital role in enabling companies and nations to drive innovation and maintain technologically competitive advantages. When making decisions on R&D investment, it is necessary to take a strategic approach with a medium- to long-term perspective, considering how to derive competitively advantageous technologies from R&D, future challenges that can be addressed and their impact, the scale and sustainability of target markets, and open & close strategies involving intellectual property and intangible assets.

While R&D expenditure in major countries has been increasing for more than two decades, Japan's total R&D expenditure has been stagnant (Figure 4). In addition, the globalization of R&D activities has progressed in recent years, with overseas R&D investment doubling since 2010, making the overseas shift in R&D increasingly pronounced (Figures 5, 6, and 7). Against this backdrop, there are concerns that Japan's R&D capabilities are declining and that cutting-edge technologies, information, and human resources are flowing overseas. In order to keep the intellectual creation cycle turning vigorously in a sustainable manner into the future, it is necessary to strengthen the domestic R&D environment, which forms the foundation of creation, and make it more attractive. In light of these concerns, the 7th Science, Technology and Innovation Basic Plan (decided by the Cabinet on March 27, 2026), formulated in March of this year, aims for a total of 180 trillion yen in combined public and private R&D investment over the next five years.



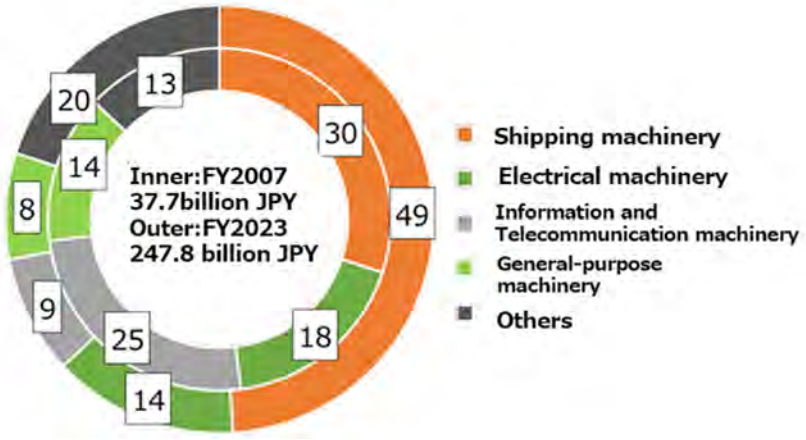
(Source) National Institute of Science and Technology Policy (NISTEP), "Science and Technology Indicators 2025"

Figure 4: Trends in Total R&D Expenditure in Major Countries



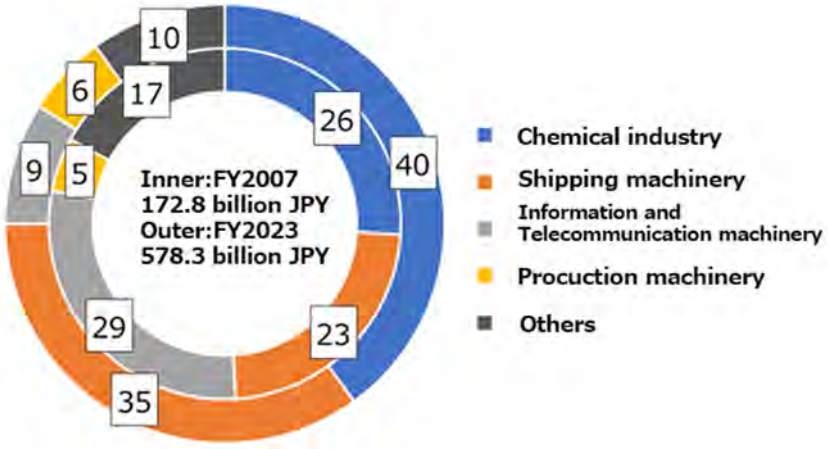
(Source) Prepared by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters based on National Institute of Science and Technology Policy, "Science and Technology Indicators 2025"

Figure 5: Trends in External R&D Expenditure by Japanese Companies (Domestic and Overseas)



(Source) Prepared by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters based on Ministry of Economy, Trade and Industry, "Basic Survey of Overseas Business Activities"

Figure 6: Industry Breakdown of R&D Expenditure Directed to China (%)



(Source) Prepared by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters based on Ministry of Economy, Trade and Industry, "Basic Survey of Overseas Business Activities"

Figure 7: Industry Breakdown of R&D Expenditure Directed to North America (%)

<Promoting Investment through Valuation and Visualization of Intellectual Property and Intangible Assets>

Intellectual property and intangible assets, which are cultivated as a result of R&D investment and human capital investment and serve as the source of corporate strengths, play an important role in realizing a high value-added economy. Technologies and IP held by companies directly contribute to differentiation from competitors' products and services and to enhancing added value, thereby playing a central role in value creation

in business activities.

While the importance of such IP and intangible assets is growing, Japanese companies have a lower ratio of intangible assets to market capitalization compared to US companies. It has been pointed out that Japanese companies are insufficiently identifying and utilizing their own IP and intangible assets, which is one factor behind the stagnation of corporate value. The latest ratio of intangible assets for Japanese companies stands at 52%, an increase of approximately 20 percentage points compared to 2020 (Figure 2). It remains important to continue promoting investment in IP and intangible assets and to spread management practices that lead to differentiation of products and services and enhancement of added value.

Furthermore, in recognition of the importance of investment in IP and intangible assets, the revision of the Corporate Governance Code in June 2021 explicitly stated that information regarding investment in IP should be disclosed and provided in an easy-to-understand manner. Against this backdrop, the "The Intellectual Property and Intangible Assets Governance Guidelines" were formulated in 2022, detailing how to put this into practice in actual corporate disclosure settings, and Ver2.0 was published in March 2023 following a revision.

As the transition from the long-standing deflationary, cost-cutting economy to a growth-oriented economy driven by wage increases and investment progresses, companies are being asked more than ever how to create and strengthen their medium- to long-term growth potential. As the Financial Services Agency (FSA) advances discussions on revising the Corporate Governance Code with a view toward streamlining and making it more principle-based, it is important to further promote the penetration of corporate management centered on IP and intangible assets. Furthermore, the concept of corporate management centered on IP and intangible assets is also effective when small and medium-sized enterprises (SMEs) and startups, which account for the majority of companies in Japan, engage in dialogue with financial institutions and others. For SMEs and startups, which hold few tangible assets, it is important to have their IP and intangible asset investment and utilization strategies properly evaluated by financial institutions and to connect this to the necessary fundraising.

Under these circumstances, the "Study Group on Effective Disclosure and Governance Regarding Investment and Utilization of Intellectual Property and Intangible Assets" (hereinafter referred to as the "IP Investment Study Group") hosted by the Cabinet Office (CAO) has shared as an important point of discussion the importance of CEOs themselves explaining IP and intangible assets as part of management strategy. There are calls to promote efforts to position IP and intangible

assets as a common language of management, through reforms to organizational structures that enable IP departments, which can take a cross-functional, bird's-eye view of the entire company, to be closely linked with business divisions, R&D divisions, and management, and to be proactively involved from the strategy formulation stage, as well as through reorganization from function-based structures to structures that are more closely aligned with business operations, and through the participation of IP officers in management. At the same time, the following challenges have been identified for Japanese companies: the strengths that form the source of their competitiveness have not been codified and remain as tacit knowledge; investment in IP and intangible assets, which is one form of growth investment, tends to be recognized as a cost without clearly demonstrating its relationship to future value creation; the division of roles and decision-making responsibilities among CxOs (CFO, CTO, CHRO, CIPO, etc.) have not been organized; there is a shortage of human resources capable of executing corporate management centered on IP and intangible assets; and indicators for objectively grasping one's own strengths have not been developed. It has also been pointed out that much of the investment in IP and intangible assets that supports future competitiveness—such as R&D, human resource development, brand building, and digital transformation—is processed as selling, general and administrative (SG&A) expenses in accounting, causing these to be evaluated as mere costs and preventing investors from fully understanding the reality of companies' growth investments and their contribution to medium- to long-term value creation. It is necessary to examine whether the positioning of growth investments included in SG&A expenses can be clearly indicated through explanations in integrated reports, securities reports, and other documents.

Furthermore, with regard to brands held by companies, it is required to promote efforts to clearly position them not merely as marketing elements but as an important part of IP and intangible assets, and to incorporate them into management strategy, governance, and investment decisions. It is necessary to develop a disclosure environment that accurately conveys the role and outcomes of brands to market participants, and to aim for the realization of a market in which investment in IP and intangible assets is properly evaluated. Taking these challenges into account, the Cabinet Office is continuing to examine bottlenecks and improvement measures with a view to revising the Intellectual Property and Intangible Asset Governance Guidelines. In revising the Intellectual Property and Intangible Asset Governance Guidelines, it is necessary to conduct surveys and analysis on the current state of promotion of IP and intangible asset management strategies at listed companies, structured by industry and

business model, as well as on the interests of institutional investors. Based on this, it is required to systematically survey and analyze advanced examples of companies that are promoting IP and intangible asset management strategies, and to build a practical framework that takes into account the stage of IP development and industry-specific characteristics. In addition, it is important to survey the legal systems of other countries that promote the formulation and execution of IP and intangible asset management strategies by companies, and to clarify areas where Japan's legal system is insufficient.

Furthermore, in addition to revising the Intellectual Property and Intangible Asset Governance Guidelines, consideration is being given to getting ahead of elements in the revision and, in conjunction with the revision of the Corporate Governance Code, disseminating messages and other communications to the boards of directors and management of listed companies that convey the essential value of IP and intangible assets.

As measures to more clearly define the positioning of IP and intangible assets as the source of sustainable corporate growth are being examined in this way, the quality of disclosure by companies is also required to improve. Among some US companies that are intentionally and strategically building intangible assets, disclosure is advancing that explains as a story how investment in intangible assets connects to future cash flows[3], and good practice cases taken up by the Financial Services Agency also show that linking IP strategy with management strategy contributes to constructive dialogue with investors. In light of these trends, it has become a challenge to examine the appropriate form of disclosure, including promoting voluntary disclosure of matters related to IP and intangible assets in integrated reports and other documents, as well as making them required items in securities reports. The IP Investment Study Group has expressed the view that supplementary explanations of the purpose, expected effects, and progress of R&D expenses and human capital investment processed as SG&A expenses would be useful for long-term investment decisions, and there are calls for organizing disclosure items and implementing measures to ensure effective disclosure while taking into account the diversity of company sizes and business types, as well as for the horizontal rollout of good practices.

On the other hand, the 17 strategic fields identified by the Council for Japan Growth Strategy are positioned as core growth engines for Japan to achieve sustainable growth even amid population decline, and international technological competition in each field is intensifying further. Under these circumstances, it is indispensable to take a bird's-eye

[3] For example, Amazon.com, Inc. explains in its IR materials that while investments in technology and infrastructure may lead to deterioration in cash flow in the short term, they contribute to long-term growth.

view of the strengths, weaknesses, and competitive environment of each field, identify Japan's path to success, and allocate limited resources in a focused manner. For this reason, it is required to support companies in upgrading their management strategies and investment decisions and putting them into practice, by examining the implementation of IP landscapes and other analyses for the 17 strategic fields, and by organizing and sharing information on priority areas for strengthening and priority measures through analysis based on IP information.

In doing so, it is important to design the implementation of IP landscapes not merely as an analysis of technological trends and competitive environments, but in an integrated manner with exit strategies that connect the results to specific commercialization and market development. In order to ensure that national investment in technology development does not stop at the proof-of-concept (POC) stage but steadily comes to fruition in social implementation and industrialization, measures toward the exit, including regulatory reform and institutional development with an eye toward the formation and expansion of markets in each field, should be taken in coordination with IP strategy, and efforts to strategically create, protect, and utilize technologies and IP that serve as chokepoints should be strengthened. As the government makes enormous investments in the 17 strategic fields, the risk that the effects of such investment will not be fully realized is high if the development of market environments as exit points does not keep pace, and it is required to actively utilize the results of IP landscape analyses in the formulation of regulatory reform and market creation strategies.

<Advancement of Innovation Management>

With a view to strengthening the locational competitiveness of R&D bases and supporting private-sector investment in intangible assets amid intensifying international competition in innovation, the Innovation Box Tax Regime came into effect in April 2025 (Figure 8). The Ministry of Economy, Trade and Industry (METI) continues to conduct outreach activities to companies and industry associations, and has discussed the scope of the Innovation Box Tax Regime and industry needs for improving convenience at the "Study Group on the Ideal Form of R&D Tax Incentives, etc.," publishing an interim summary in August 2025.

It is expected that the active utilization of this system will further promote domestic R&D activities, and that this will serve as an opportunity for the value of IP and intangible assets existing within companies to be reassessed and for management's involvement in IP and intangible asset management to advance.

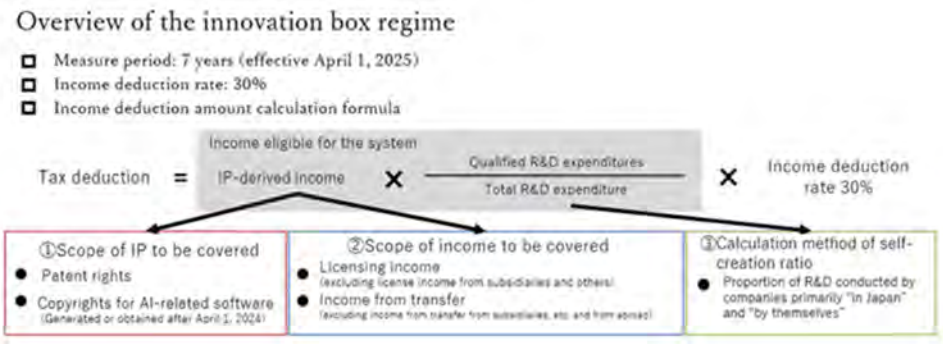


Figure 8: Overview of the Innovation Box Tax Regime

<Regarding KPIs>

The Intellectual Property Strategic Program 2025 stated that "KPIs will be set at an appropriate time" for this item. In light of the numerical targets set in the 7th Science, Technology and Innovation Basic Plan, the KPI is set as follows: "Aim for a total of 180 trillion yen in combined public and private R&D investment over the next five years."

(Direction of Measures)

- Including coordination with award programs that publicize activities in which IP and intangible assets are strategically utilized to enhance corporate value as good practices, examine measures to further disseminate and embed the concept of promoting investment and utilization of IP and intangible assets, including revision of the Intellectual Property and Intangible Asset Governance Guidelines, which organizes the roles of CxOs, the concept of growth investment, the development of management human resources, and the use of indicators, as well as getting ahead of elements of the Intellectual Property and Intangible Asset Governance Guidelines and, in conjunction with the revision of the Corporate Governance Code, disseminating messages and other communications to the boards of directors and management of listed companies that convey the essential value of IP and intangible assets.

(Short term and mid term) (CAO (IP), METI, JPO)

- In light of the provisions on intellectual property in the Corporate Governance Code and the Tokyo Stock Exchange's request for "responses toward the realization of management conscious of cost of capital," continue to encourage companies to invest in intellectual property and other areas.

(Short term and mid term) (FSA, CAO (IP))

- In order to examine measures for improving the efficiency and sophistication of

IP operations, including IP intelligence using generative AI, at mid-sized companies and others, organize the challenges and solutions at each stage from the introduction to operation of generative AI in IP practice, and identify specific cases that can be utilized in IP practice.

(Short term and mid term) (JPO)

- IP and intangible asset strategy is an important key alongside human capital strategy, business portfolio management strategy, and DX strategy for co-creating value creation stories for the realization of Sustainability Transformation (SX), and through SX brands, integrated strategy formulation and disclosure of various strategies including IP and intangible asset strategy are recommended.

(Short term and mid term) (METI, CAO (IP))

- In order to support objective disclosure and other activities related to corporate investment in GX technologies, promote the dissemination and utilization of the Green Transformation Technology Classification Table domestically and internationally.

(Short term and mid term) (JPO)

- In order to develop an environment in which the significance of corporate investment in IP and intangible assets and their contribution to value creation are easier for investors to understand and evaluate, examine the appropriate form of disclosure regarding matters related to IP and intangible assets, including promoting voluntary disclosure in integrated reports and other documents as well as making them disclosure items in securities reports, and present a policy by the end of fiscal year 2026.

(Short term and mid term) (CAO (IP), FSA)

- Examine the implementation of IP landscapes utilizing patent and other IP information for the 17 strategic fields identified by the Council for Japan Growth Strategy, and clarify the path to success for R&D projects supported by the government and others.

(Short term and mid term) (CAO (IP), METI, MIC, MLIT, CAS (NRPO), MOD, Acquisition, Technology & Logistics Agency (ATLA), MAFF, CAO (SSTIP, HMSPS, NOPS), Digital Agency, JPO)

- Regarding the Innovation Box Tax Regime, further promote awareness so that businesses can utilize this system, and work toward its steady implementation. With regard to the scope of the system, after sufficiently verifying the implementation status and effects of the system, examine revisions as appropriate in light of the feasibility of implementation and the status of securing financial

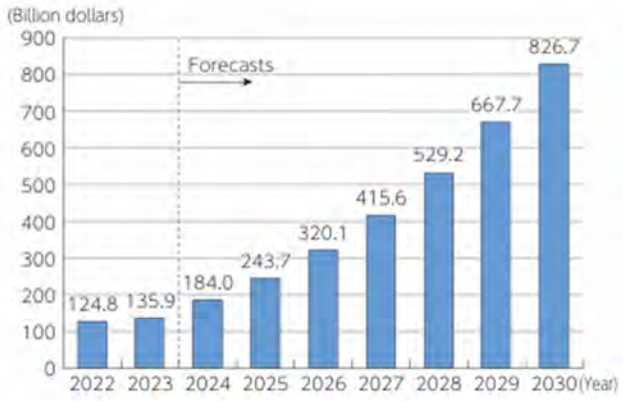
resources. Continue to examine improvements in convenience suited to the actual conditions of Japanese companies.

(Short term and mid term) (METI)

(2) AI and Intellectual Property Rights

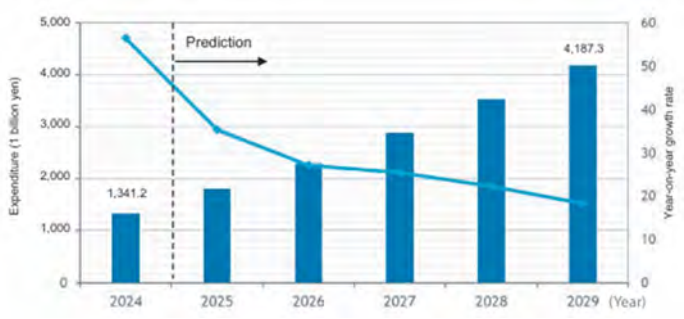
(Current Situation and Challenges)

The global AI market size (revenue) is projected to expand from USD 184 billion in 2024 to USD 826.7 billion in 2030, making AI a foundational field driving the global economy (Figure 9). Japan's AI system market (expenditure) also reached 1,341.2 billion yen in 2024 (a 56.5% increase from the previous year) and is projected to expand to 4,187.3 billion yen by 2029 (Figure 10).



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

Figure 9: Trends and Projections for Global AI Market Size (Revenue)

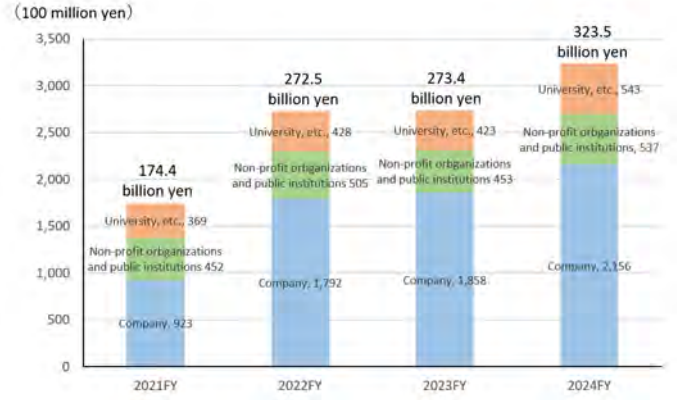


(Source) Ministry of Internal Affairs and Communications, "2025 White Paper on Information and Communications in Japan"

Figure 10: Domestic AI System Market Size (Expenditure) and Projections

Against this backdrop, R&D expenditure in the AI field has shown high growth in recent years, increasing from 273.4 billion yen in fiscal year 2023 to 323.5 billion yen in fiscal year 2024, an increase of 18.3% year-on-year (Figure 11). This is considered to

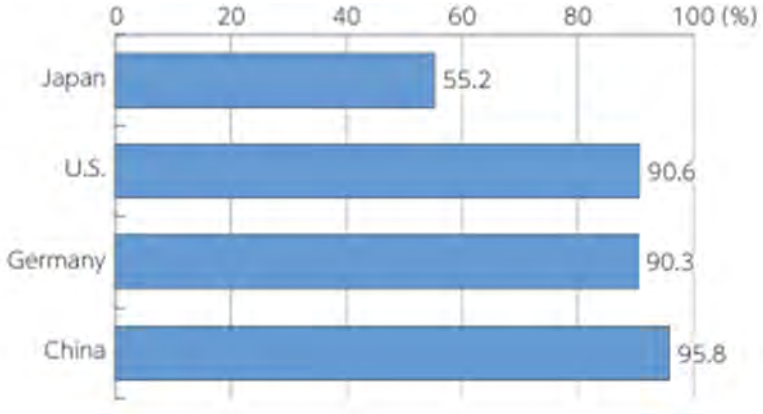
indicate that R&D investment positioning AI as a core technology, as well as the rapid social implementation of generative AI, has begun in earnest at companies, universities, and public institutions.



(Source) Prepared by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters based on Ministry of Internal Affairs and Communications, "Survey on Research and Development"

Figure 11: R&D Expenditure in the AI Field by Research Entity

While the AI market size and R&D expenditure are increasing, the utilization of generative AI in business operations by Japanese companies lags behind overseas counterparts. The proportion of respondents who answered that they use generative AI in some business operations exceeds 90% for companies in the United States, Germany, and China, while it remains at 55.2% for Japanese companies (the proportion who answered that they are currently using it in business operations).



(Source) Ministry of Internal Affairs and Communications (2025), "Research on the Latest Trends in Information and Communication Technology Research and Development and Digital Utilization Domestically and Internationally"

Figure 12: Rate of Generative AI Utilization in Business Operations by Companies (by Country)

In this context, AI, and in particular generative AI and agentic AI, is becoming a foundational technology that dramatically enhances the productivity and creativity of R&D, creative activities, and business activities, and accelerates the entire intellectual creation cycle. On the other hand, new challenges related to the IP system have become apparent, including the appropriate allocation of responsibility for generated outputs, the handling of training data, and the relationship between generated outputs and copyright, patent rights, design rights, trademark rights, and other IP rights, and there are also indications that the severity of these issues is increasing with the emergence of agentic AI.

Internationally, the World Intellectual Property Organization (WIPO) has been leading ongoing discussions on the impact of AI development on the IP system. The "WIPO Conversation on Intellectual Property and Frontier Technologies," in which member states and diverse stakeholders participate, has been examining from multiple angles the applicability and limitations of existing systems, including copyright challenges surrounding training data and outputs of generative AI, and the appropriate form of systems and infrastructure supporting rights management and transparency. In March 2026, the AI Infrastructure Interchange (AIII) was launched, focusing on the technical and operational challenges of IP infrastructure in the AI era, and promoting global dialogue.

Domestically, the AI Act was enacted and came into force in 2025, establishing a legal framework for the comprehensive and systematic promotion of AI research, development, and utilization. Based on this Act, the Artificial Intelligence Strategy Headquarters (AI Strategy Headquarters), headed by the Prime Minister, was established to build a structure for cross-cutting promotion of AI policy. Furthermore, based on Article 18 of the Act, the "Basic Plan for Artificial Intelligence" (decided by the Cabinet on December 23, 2025) (hereinafter referred to as the "AI Basic Plan") was formulated by the end of 2025, clarifying a national strategy that aims to make Japan "the country where AI is easiest to develop and utilize in the world," while balancing the promotion of innovation and response to risks, centered on "trustworthy AI." The AI Basic Plan explicitly states that efforts will be made to ensure transparency that leads to appropriate protection and utilization of IP, to promote the return of remuneration to content holders, to develop consultation systems regarding IP infringement by generative AI, and to provide easy-to-understand information on generative AI and IP rights. This signifies that IP has been positioned as an indispensable element for both promoting innovation and ensuring social trust within the overall AI policy.

On the other hand, Japan remains in a difficult position in the international

competition for overall innovation. As noted in "II. 1. Basic Recognition," Japan ranks 12th in the WIPO Global Innovation Index 2025, lagging behind major Asian countries such as South Korea (4th) and China (10th). It is urgent to reliably protect and utilize the value created in the AI field as IP and to strengthen competitiveness.

In particular, regarding generative AI, creators and rights holders have expressed concerns about the risk of copyright and other IP infringement, alongside improper use of personal information, the sophistication and facilitation of crime, and disruption caused by disinformation.

In response to these concerns, the relationship between AI and copyright has been examined by the Legal System Subcommittee of the Copyright Division of the Council for Cultural Affairs, and the relationship with IP rights in general has been examined by the Study Group on Intellectual Property Rights in the AI Era (Secretariat: Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters). The results of these examinations have been published as "Perspectives on AI and Copyright" (March 2024) and the "Interim Summary of the Study Group on Intellectual Property Rights in the AI Era" (May 2024) (hereinafter referred to as the "Interim Summary"), respectively.

The Interim Summary aims to realize an "ecosystem in which the advancement of AI technology and the appropriate protection of intellectual property rights are compatible" as the desirable relationship between generative AI and IP rights. To this end, it is expected that a virtuous cycle will be realized in which high-quality data is accumulated under trustworthy developers for creators, leading to the development and provision of advanced generative AI as well as new creative activities, through the combined use of legal, technical, and contractual means, and through the collaboration of a wide range of stakeholders including AI developers, AI providers, AI users, and rights holders.



(Source) Study Group on Intellectual Property Rights in the AI Era, "Interim Summary"

Figure 13: Complementarity of Legal, Technical, and Contractual Means

<Response to Concerns and Risks Surrounding Generative AI and Intellectual Property, in Light of the Enactment of the AI Act>

The Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters, taking into account the basic principles of the AI Act and the provision in the AI Basic Plan that transparency leading to appropriate protection and utilization of IP should be ensured, is advancing examination toward the formulation of Principle-Code for Protection of intellectual property and transparency for the appropriate use of generative AI (tentative name), with the aim of defining the principles for measures that generative AI businesses should take to ensure transparency and protect IP rights, and thereby ensuring a safe and secure environment for rights holders and users, toward the compatibility of promoting the advancement of generative AI technology and the appropriate protection of IP rights.

The Agency for Cultural Affairs and the Ministry of Economy, Trade and Industry launched the "Network of Stakeholders on AI and Copyright" in 2024, and are operating a forum where rights holders and businesses gather to exchange opinions, in order to facilitate appropriate communication among the parties concerned and realize a co-creative relationship toward the creation of new content and the development of culture.

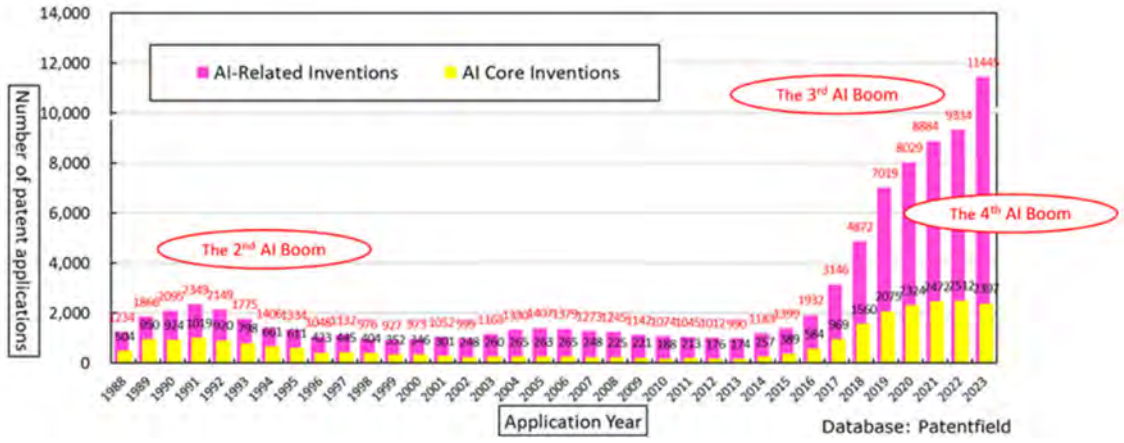
Furthermore, under the "Project for Building an Environment to Promote the Distribution of Copyrighted Works Data for the Return of Remuneration to Creators," funded by the supplementary budget for fiscal year 2025, the Agency for Cultural Affairs will conduct research, surveys, and demonstrations over multiple years and in multiple fields on matters necessary for the distribution of copyrighted works data, including paid provision, in order to promote the return of remuneration to creators and others, and will create and horizontally roll out model cases.

Regarding the protection of likeness and voice, there are now multiple private-sector initiatives that aim to protect voices through technology while pursuing monetization, as well as activities by actors, voice actors, and others to protect and utilize their likeness and voice, such as the development of voice AI services by well-known voice actors. On the other hand, there continue to be cases where generative AI models or services that have been trained solely on the likeness or voice of a specific actor or voice actor, and that can produce outputs that the general public would recognize as the likeness or voice of that actor or voice actor, are made publicly available without obtaining the consent of the actor or voice actor concerned, and their outputs are used in various forms. Regarding such unauthorized use of the likeness and voice of actors, voice actors, and others, the Ministry of Economy, Trade and Industry published "Perspectives on the Current Approach under the Unfair Competition Prevention Act Regarding the

Publicity Value of Likeness and Voice" in 2025, organizing the approach under the Unfair Competition Prevention Act, and the same ministry's "Study Group on Civil Liability in AI Utilization" has also organized that AI developers and AI service providers may in certain cases be held responsible for infringement of publicity rights. However, it is necessary to continue examining the appropriate form of protection for the likeness and voice of actors, voice actors, and others, taking into account the actual situation.

<Appropriate Responses in the Field of Industrial Property Rights in Light of the Development of AI Technology>

Against the backdrop of the recent increase in R&D activity in the AI field and the arrival of the so-called fourth AI boom, with the development of technologies and services using generative AI and conversational AI becoming active from the end of 2022, the number of patent applications for AI-related inventions has also been increasing, reaching 11,445 in 2023 (Figure 14).



(Source) Japan Patent Office, "Simplified Technology Trend Survey for Fiscal Year 2025: AI-Related Inventions"

Figure 14: Trends in the Number of Patent Applications for AI-Related Inventions Filed in Japan

Furthermore, the development of generative AI technology has made it possible to generate and publish large amounts of technical information and design proposals in a short time and at low cost, changing intellectual creation activities.

Against this backdrop, the Patent System Subcommittee and the Design System Subcommittee of the Intellectual Property Division of the Industrial Structure Council are advancing examination of appropriate responses in the field of industrial property rights in light of the development of AI technology. Regarding the patent system,

specific examination is being advanced on topics such as inventions, inventors, and the eligibility of cited inventions in AI-assisted inventions, taking into account the perspectives of (i) whether the problem is expected to materialize in the near future including from a technical standpoint, (ii) whether there is a need for examination from patent holders or third parties, and (iii) whether examination is warranted in light of domestic and international developments. Regarding the design system, specific examination is being advanced on topics such as designs, creators, and the eligibility of cited designs in designs created using generative AI, taking into account the perspectives of (i) whether examination is highly necessary in light of the actual state of design creation and the state of technological development, (ii) whether examination is highly necessary in light of the opinions of stakeholders involved in design creation, and (iii) whether examination is warranted in light of domestic and international developments.

<Regarding KPIs>

The Intellectual Property Strategic Program 2025 set a KPI of "raising the rate of AI utilization by Japanese companies to approximately 100%," and the rate of AI utilization by Japanese companies stands at 55.2% in the fiscal year 2025 survey.

The same program also set a KPI of "clarifying AI-assisted inventions and promoting R&D using AI (increase in R&D expenditure in the AI field)," and R&D expenditure in the AI field reached 323.5 billion yen in fiscal year 2024, an increase of 18.3% compared to fiscal year 2023.

(Direction of Measures)

- In light of the expansion of AI utilization in the patent field due to advances in AI technology, continue to examine challenges arising in patent practice at the Patent System Subcommittee of the Intellectual Property Division of the Industrial Structure Council, while monitoring international trends.

  (Short term and mid term) (JPO)
- In light of the expansion of AI utilization in the design field due to advances in AI technology, continue to examine challenges arising in design practice at the Design System Subcommittee of the Intellectual Property Division of the Industrial Structure Council, while monitoring international trends.

  (Short term and mid term) (JPO)
- Based on the approach set out in the "Interim Summary," make timely and necessary updates to guidelines and other documents related to IP law and AI

governance so that the parties concerned proactively work toward the compatibility of promoting the advancement of AI technology and the appropriate protection of IP rights through a combination of legal, technical, and contractual means, and disseminate these in an easy-to-understand manner to society.

(Short term and mid term) (CAO (IP), MIC, Agency for Cultural Affairs, METI)

- Continue to promote appropriate communication among the parties concerned in order to facilitate information sharing on licensing status and other matters between generative AI and the businesses and creators involved.

(Short term and mid term) (Agency for Cultural Affairs, METI)

- 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 infringement of publicity rights and other rights, examine the legal interpretation and application of tort law regarding such infringement based on current law and case law, prepare guidelines and other documents, disseminate the results, and continue discussions including the necessity of hard law development (including amendment of the Unfair Competition Prevention Act) toward more reliable rights protection.

(Short term and mid term) (MOJ, METI, CAO (IP), Consumer Affairs Agency, MIC, Agency for Cultural Affairs, JPO)

- Formulate the "Principles and Code on the Protection of Intellectual Property and Transparency for the Appropriate Utilization of Generative AI" (tentative name), with the aim of ensuring a safe and secure environment for rights holders and users toward the compatibility of promoting the advancement of generative AI technology and the appropriate protection of IP rights, and promote the development of an environment for the return of remuneration to creators and others.

(Short term and mid term) (CAO (IP), Agency for Cultural Affairs, METI)

- Regarding the relationship between summary services using generative AI and technical measures such as robots.txt, organize the challenges regarding measures such as disclosure of user agents and compliance with robots.txt and other measures, with a view to preventing improper use.

(Short term and mid term) (CAO (IP), Japan Fair Trade Commission, Agency for Cultural Affairs)

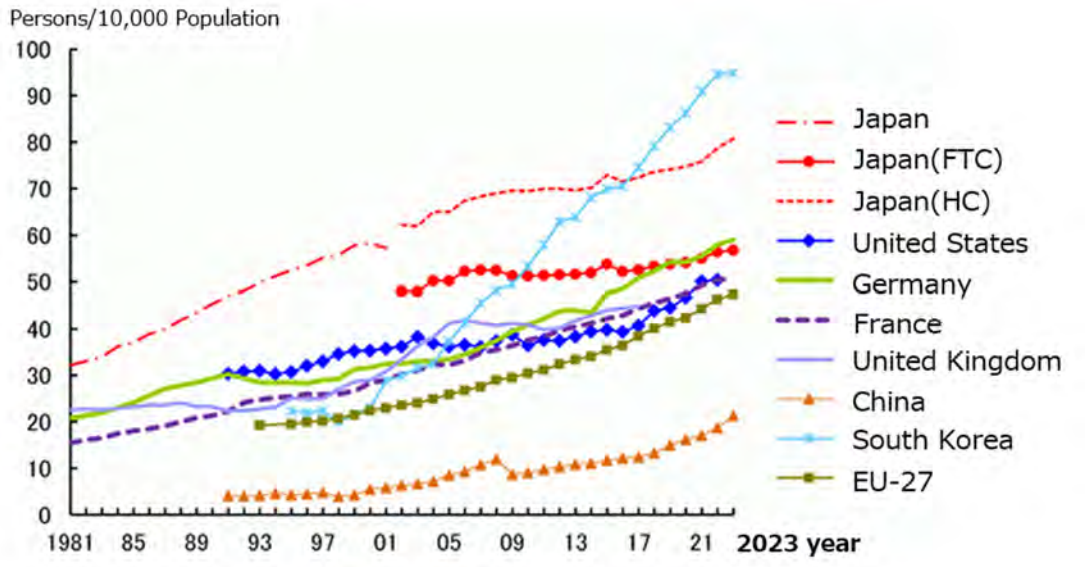
(3) Strengthening Creative Human Resources and Achieving Diversity

(Current Status and Challenges)

Creative human resources in Japan, including researchers and doctoral human resources, are central figures supporting the strengthening of industrial competitiveness and the resolution of social challenges as the source of intellectual property creation and innovation. The advanced specialized knowledge and research achievements accumulated in universities, public research institutions, and companies have underpinned Japan's technological superiority to date; however, the environment surrounding creative human resources is changing significantly with the intensification of international research competition and the acceleration of technological innovation. In particular, it has become indispensable to simultaneously advance the quantitative securing and qualitative enhancement of creative human resources, as well as the securing of diversity, in order to sustainably enhance intellectual property creation capabilities.

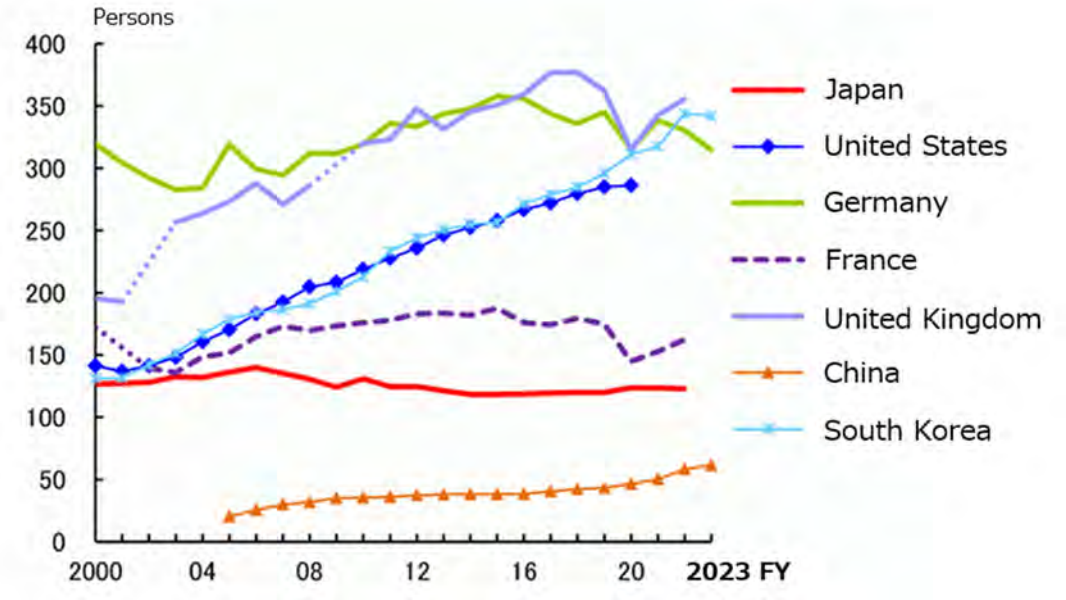
From a quantitative perspective, while the number of researchers in Japan continues to rank among the top of major countries, its growth has been limited, and challenges have become apparent in terms of human resource composition. According to "Science and Technology Indicators 2025" (August 2025, National Institute of Science and Technology Policy), Japan had the highest number of researchers per 10,000 population among major countries until 2009, but was surpassed by Korea in 2010 and by Germany in 2019. Looking at the higher education stage, the number of doctoral degree recipients per million population in Japan was 123 in FY2022, which is low compared to other countries. Looking at the latest figures for other countries, the United Kingdom has the highest number at 355, followed by Korea at 342 and Germany at 314.

In light of this situation, the Ministry of Education, Culture, Sports, Science and Technology has set a target in its "Doctoral Human Resources Activation Plan" to increase the number of doctoral degree recipients per million population approximately threefold compared to FY2020 by 2040, reaching the world's top level.



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

Figure 15: Number of Researchers per 10,000 Population in Major Countries



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

Figure 16: Number of Doctoral Degree Recipients per Million Population in Major Countries

<Promotion of Intellectual Property Creation Education>

The philosophy of intellectual property creation education corresponds to the three pillars of qualities and abilities that the Course of Study aims to cultivate, and efforts have been made to promote the penetration of intellectual property creation education in

higher education and elementary and secondary education settings[4].

Among these efforts, in the Chugoku region, active initiatives are being undertaken at educational institutions, companies, and prefectures, including outreach classes for elementary, junior high, and high school students, workshops, and support activities. At the university level, Yamaguchi University, which has been designated by the Ministry of Education, Culture, Sports, Science and Technology as an "Education-Related Joint Utilization Base" related to intellectual property education, has been expanding its intellectual property education curriculum and intellectual property training programs for faculty and staff to other universities, with training programs having been provided to a cumulative total of over 130,000 participants through FY2024.

In addition, the Japan Patent Office (JPO) and the Industrial Property Information and Training (INPIT) are implementing the "Intellectual Property Capability Development School Support Program," which supports efforts to cultivate knowledge, attitudes, and dispositions regarding the protection and utilization of intellectual property rights among high school and technical college students as future industrial human resources. In FY2025, 65 schools were selected as supported schools. Furthermore, for university and graduate school students, in FY2024, methods for conducting intellectual property education as part of entrepreneurship education were examined, the content of intellectual property education considered necessary was categorized, and teaching materials were also developed.

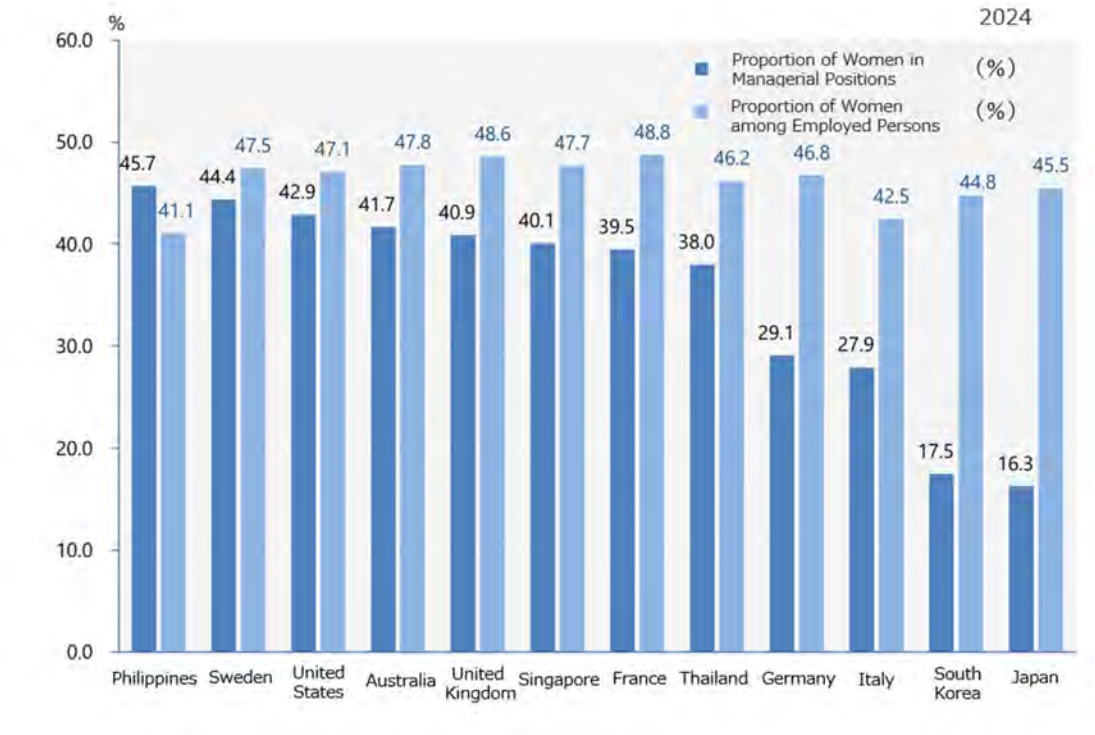
Going forward, in addition to these intellectual property education initiatives, as the importance of a perspective that views intellectual property strategy and international standardization strategy in an integrated manner is increasing when further developing intellectual property creation education, it is necessary to examine means of incorporating basic knowledge and strategic thinking regarding international standardization into education and to promote its penetration. In order to foster industrial human resources with an eye toward the value assessment of technology and intellectual property, commercialization, and international expansion, it is required to provide opportunities to learn about intellectual property and international standardization in an integrated manner, thereby leading to the development of human resources with strategic thinking that combines both.

<Diversity of Human Resources Supporting Innovation>

[4] Specifically, the "Intellectual Property Creation Education Promotion Consortium" was held to promote "intellectual property creation education," and in March 2021, a concrete action plan was compiled outlining the specific actions to be taken by those involved in intellectual property creation education. As a result, region-led local consortiums are currently playing a central role in advancing the dissemination and practice of intellectual property creation education.

The creation of innovation has its limits when based solely on ideas derived from a single set of values and experiences, and is only sustainably generated when diverse human resources with different knowledge, experiences, and values stimulate one another. The Ministry of Economy, Trade and Industry defines diversity management as "management that creates innovation and leads to value creation by leveraging diverse human resources and providing opportunities for their abilities to be maximized," and has made clear that diversity is indispensable for enhancing corporate innovation capabilities through a virtuous cycle of generating free ideas, improving productivity, and strengthening competitiveness. In particular, amid rapid changes in technology and market environments and the need to address increasingly complex and sophisticated social challenges, building a human resource base that encompasses diversity in terms of gender, nationality, age, area of expertise, career, and other factors has become an important prerequisite for continuously creating innovation.

On the other hand, while efforts toward diversity in Japanese companies have been steadily progressing, from an international perspective, there are still many challenges, such as the considerably low proportion of executives with experience at other companies and the low proportion of women in managerial positions (Figure 17).



(Source) Japan Institute for Labour Policy and Training, "Databook of International Labour Statistics 2025"

Figure 17: Proportion of Women among Workers and Managers

Therefore, it is hoped that the securing of diversity and the penetration of inclusivity that recognizes diversity itself will further advance in Japan.

Under these circumstances, the JPO, together with WIPO, held an "International Forum on Promoting the Use of Intellectual Property for the SDGs" at the Osaka-Kansai Expo, and held an award ceremony for the "EXPO2025 JPO WIPO AWARD," which recognizes companies that are using intellectual property to resolve social challenges and achieve inclusive growth. The award targets companies that effectively utilize intellectual property to resolve social challenges and design a better future society in the areas of climate change, women's participation, and youth participation. These initiatives are expected to make a significant contribution to the participation of diverse human resources throughout the intellectual property ecosystem.

<Active Acceptance of Highly Skilled Foreign Professionals and Development of Hubs>

The promotion of accepting overseas human resources with advanced knowledge and experience is indispensable for maintaining and improving Japan's international competitiveness in securing creative human resources. In recent years, the global mobility of human resources has been accelerating, with highly skilled human resources who have studied computer science and other fields at top universities in the United States facing difficulties in finding employment. This situation presents an excellent opportunity for Japan to attract first-rate creative human resources from around the world, and there is potential to significantly improve Japan's human resource base by actively accepting talented human resources not only from Southeast Asia, India, and other regions as before, but also from Western countries including the United States.

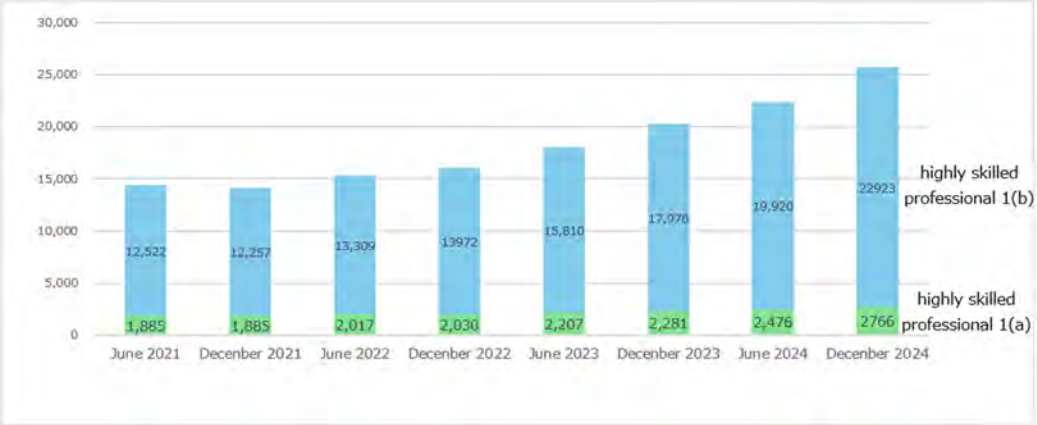
The Government has introduced the "Points-based System for Highly Skilled Foreign Professionals," further established the residence status "Highly Skilled Professional" specifically for highly skilled foreign professionals, and introduced the System for Special Highly-Skilled Professionals (J-Skip)[5] and the System for Future Creation Individual Visa (J-Find)[6] in order to promote the acceptance of foreign nationals with advanced capabilities expected to contribute to economic growth and other areas by providing preferential treatment in immigration control. As a result, the number of

[5] With the aim of promoting the acceptance of those with top-level abilities among highly skilled foreign professionals, the status of residence of Highly Skilled Professional (i) shall be granted based on academic background or work experience and annual income, without relying on the point-based system.

[6] With the aim of attracting at an early stage young people with high potential who are expected to play an active role as promising human resources for the future, the status of residence for activities such as job-seeking activities (Specified Activities) shall be granted to those who meet the requirements.

foreign residents holding residence status for activities engaged in research, guidance of research, or education based on contracts with public or private organizations in Japan (Highly Skilled Professional 1(a)) and activities engaged in work requiring knowledge or skills in the fields of natural science or humanities based on contracts with public or private organizations in Japan (Highly Skilled Professional 1(b))[7] has been increasing (Figure 18).

Regarding the Points-based System for Highly Skilled Foreign Professionals, taking into account changes in the economic and social environment since the system began operation, the Government will work toward further optimization of the system through reviewing income standards and other criteria in point-addition items and reorganizing point-addition items, as well as expediting screening, so that highly skilled human resources contributing to Japan's competitiveness and the creation of innovation can be accepted more accurately and smoothly under the system, based on actual residence conditions.



(Source) Prepared by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters based on the Immigration Services Agency of Japan website "Statistics on Foreign Residents (formerly Statistics on Registered Foreigners)"

Figure 18: Trends in Statistics on Foreign Residents (Highly Skilled Professional 1(a) and 1(b))

As the number of foreign residents increases, the need to realize a society in which both Japanese nationals and foreign nationals can live safely and securely and prosper together is also growing. In order to comprehensively promote various measures toward the realization of an orderly society of coexistence with foreign nationals, the

[7] Highly Advanced Academic Research Activities "Highly Skilled Professional 1 (a)": Activities of engaging in research, research guidance, or education based on a contract with a public or private organization in Japan
Highly Advanced Specialized/Technical Activities "Highly Skilled Professional 1 (b)": Activities of engaging in work requiring knowledge or skills in the field of natural science or humanities based on a contract with a public or private organization in Japan

Government established the " Office for a Society of Well-Ordered and Harmonious Coexistence with Foreign Nationals" as a secretariat organization serving as the control tower for foreign national policies within the Cabinet Secretariat on July 15, 2025. Furthermore, on November 4 of the same year, the " Ministerial Council on the Acceptance of Foreign Nationals and the Realization of a Society of Well-Ordered and Harmonious Coexistence" was held, and it was decided to proceed with deliberations to present basic concepts and directions for initiatives. Based on these deliberations, on January 23, 2026, the " Comprehensive Measures for Acceptance of Foreign Nationals and Well-Ordered and Harmonious Coexistence," which incorporates measures for ensuring the safety and security of Japanese nationals and measures for foreign nationals to smoothly adapt to Japanese society, was decided at the said Cabinet Ministers' Meeting.

The Comprehensive Measures also include support for the employment and settlement of foreign students at local Japanese companies through the " Consortium for Highly-skilled Foreign Professionals Promotion Area," which consists of the Japan External Trade Organization (JETRO), economic organizations, local governments, and others.

<Regarding KPIs>

The Intellectual Property Strategic Program 2025 set a KPI of "increasing the number of doctoral degree recipients per million population in 2040 to the world's top level." The number of doctoral degree recipients per million population in Japan was 124 in FY2021 and 123 in FY2022, remaining flat.

The Intellectual Property Strategic Program set a KPI of "expanding initiatives related to intellectual property education involving intellectual property creation, protection, and utilization (number of initiative cases)." The number of participants in training and other programs related to intellectual property provided by the Intellectual Property Center of Yamaguchi University, an Education-Related Joint Utilization Base, was 17,083 in FY2023 and 15,063 in FY2024. In addition, the number of initiative cases under the Intellectual Property Capability Development School Support Program, which supports intellectual property learning initiatives at high schools and technical colleges, was 48 schools in FY2024 and 65 schools in FY2025, increasing due to the expansion of eligible schools to include general course high schools in FY2024. Furthermore, teaching materials were developed through a JPO survey project on intellectual property education conducted as part of entrepreneurship education, and six rounds of empirical verification regarding the usefulness of intellectual property

education in entrepreneurship education were conducted in FY2025.

The Intellectual Property Strategic Program set a KPI of "advancing the incorporation of innovation human resources and increasing the number of highly skilled foreign professionals (number of foreign residents (Highly Skilled Professional 1(a) and 1(b)))." The number of foreign residents holding Highly Skilled Professional 1(a) residence status was 2,766, and the number holding Highly Skilled Professional 1(b) residence status was 22,923 (as of end of June 2025), representing increases of 290 and 3,003 respectively compared to the same month of the previous year.

(Direction of Measures)

<Promotion of Intellectual Property Creation Education>

- Promote the smooth introduction of intellectual property education into the educational curriculum at universities considering the introduction of intellectual property education by sharing the intellectual property education curriculum and introduction processes of universities designated as "Education-Related Joint Utilization Bases" for intellectual property education with such universities.

  (Short term and mid term) (CAO (IP), MEXT)

- Provide support so that intellectual property creation education can be disseminated and promoted in regional consortiums that serve as regional collaboration hubs connecting educational settings and local communities.

  (Short term and mid term) (CAO (IP))

- Recommend the acquisition of intellectual property-related qualifications such as the Intellectual Property Management Skills Test in order to raise awareness of intellectual property at companies, schools, and other organizations.

  (Short term and mid term) (CAO (IP), JPO)

- Utilize mechanisms such as the Next Generation Science and Technology Challenge Program to discover and develop human resources with original creative thinking, and support universities that provide advanced and practical lectures and research.

  (Short term and mid term) (MEXT)

- Taking into account the rapid development of new digital technologies and other factors, conduct awareness-raising and enlightenment activities on copyright through seminars and social media targeting the general public broadly, incorporating not only general knowledge of the copyright system but also perspectives on social developments surrounding copyright and the relationship between digital technologies such as Web3.0-related technologies and copyright.

Also, examine effective awareness-raising activities in cooperation with relevant organizations so that all citizens, including creators, can be aware of copyright on a daily basis.

(Short term and mid term) (Agency for Cultural Affairs)

- Implement programs to deepen understanding of intellectual property and raise interest in innovation among elementary, junior high, and high school students as the next generation, with the cooperation of local companies and others. Also, broadly support the cultivation of an intellectual property mindset encompassing the creation, protection, and utilization of intellectual property among high school and technical college students through the "Intellectual Property Capability Development School Support Program." Furthermore, improve practical knowledge and skills, in addition to knowledge necessary for problem-solving including the protection and utilization of intellectual property, by providing education on intellectual property as part of entrepreneurship education for university students and others.

(Short term and mid term) (JPO)

<Diversity of Human Resources Supporting Innovation>

- With the aim of increasing the number of doctoral degree recipients in Japan, in addition to improving the treatment of doctoral course students, promote the realization of a society in which doctoral human resources play active roles in diverse fields of society, including expanding recruitment in the industrial sector, through the dissemination and promotion of the "Guidebook for Promoting the Active Roles of Doctoral Human Resources in Private Companies" and the "Collection of Role Model Cases of Doctoral Human Resources Active in Companies."

(Short term and mid term) (METI, MEXT)

- While the movement to promote diversity and inclusivity continues internationally, deepen cooperation with intellectual property offices and related organizations around the world and domestic intellectual property system user organizations to advance the formation of networks and the development of an environment for enhancing diversity and inclusivity.

(Short term and mid term) (JPO)

- Proceed with deliberations on implementing in local regions the support know-how, cases, and learning content verified through expert support accompanying startup companies, non-profit organizations, individuals, and others aiming to

resolve social challenges, as disseminated at the Osaka-Kansai Expo, and promote awareness and dissemination of the role of intellectual property in resolving social challenges.

(Short term and mid term) (JPO)

- Examine measures necessary for developing young researchers capable of conducting quantitative analysis and evaluation of corporate value and economic value associated with intellectual property utilization and other factors, in order to further promote the utilization of intellectual property by companies by making the effects of intellectual property utilization visible.

(Short term and mid term) (JPO)

- In order to strengthen intellectual property management capabilities throughout the agriculture, forestry, fisheries, and food industries, work to raise awareness throughout the agriculture, forestry, fisheries, and food industries through the implementation of seminars and support for the development of programs for seed and seedling businesses, and develop and secure intellectual property specialist human resources (lawyers, patent attorneys, etc.) capable of providing advice suited to the agriculture, forestry, fisheries, and food industries, as well as core human resources who lead operations in the field of the agriculture, forestry, fisheries, and food industries.

(Short term and mid term) (MAFF)

<Active Acceptance of Highly Skilled Foreign Professionals and Development of Hubs>

- In order to secure talented young human resources including graduates of top universities in Southeast Asia, India, and other regions, strengthen cooperation with local universities through the use of internships and other means, and examine the strengthening of attraction efforts including the utilization of the System for Future Creation Individual Visa (J-Find) and the Points-based System for Highly Skilled Foreign Professionals following further optimization and expedited screening, as well as the strengthening of awareness-raising activities for companies and highly skilled foreign professionals.

(Short term and mid term) (Immigration Services Agency, METI, MEXT)

- In order to improve Japan's research capabilities, it is increasingly necessary to internationalize research activities, and it is important for researchers to join global networks through international joint research and other means, and for excellent researchers to circulate internationally. To this end, further strengthen strategic

cooperation with scientifically advanced countries in cutting-edge fields while ensuring research security, and strengthen strategic collaboration with ASEAN, India, and the Global South including other regions, as well as exchanges among young researchers.

(Short term and mid term) (MEXT)

- The acceptance of foreign students has significance in contributing to mutual understanding and friendship with other countries, the acquisition of highly skilled foreign professionals, and the strengthening of the international competitiveness of universities and other institutions. To this end, while placing even greater emphasis on the perspective of improving quality through thorough enrollment management and security trade control rather than prioritizing quantity, accept excellent foreign students from diverse countries and regions, and promote the internationalization of universities, including the development of environments in which Japanese students and foreign students learn together and the strengthening of inter-university exchanges with quality assurance.

(Short term and mid term) (MEXT)

2. "Protection" of Intellectual Property

（1） Prevention of Technology Leakage

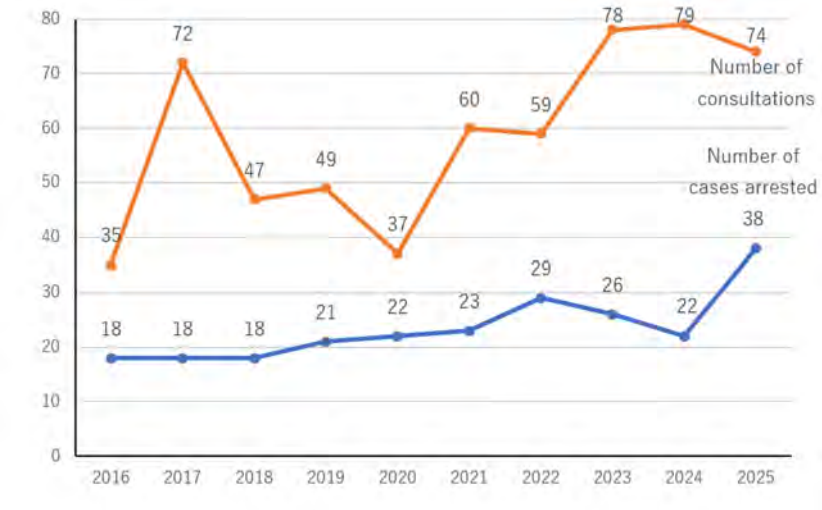
(Current Situation and Challenges)

<Trade Secrets and Limited Provision Data>

In recent years, against the backdrop of heightened geopolitical tensions, intensifying competition among nations, and the advancement of dual-use applications of cutting-edge technologies, the risk that Japan's superior technologies and research outcomes may unintentionally flow overseas, causing serious impacts on national security and industrial competitiveness, has been increasing further. As corporate and research activities become more internationalized, employment becomes more fluid, and digital technologies advance, opportunities for the transfer of technical information through people, data, and networks are increasing, making the management of trade secrets and data more important than ever before.

Under these circumstances, the risk of technology leakage, including trade secret infringement, is becoming a real and tangible problem. According to the "Status of Arrests for Crimes Affecting Daily Economic Life in 2025" published by the National Police Agency, the number of consultations received by the police regarding trade secret infringement offenses reached 74 cases in 2025, exceeding 70 cases for three consecutive years. Furthermore, the number of arrested cases in 2025 was 38,

representing a 73% increase from the previous year. This indicates that companies and research institutions are increasingly facing the risk of trade secret leakage against the backdrop of greater labor mobility and the expansion of international business activities (Figure 19).



(Source) Prepared by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters based on the National Police Agency's "Status of Arrests for Crimes Affecting Daily Economic Life in 2025"

Figure 19: Trends in the Number of Arrested Cases and Consultations Received Regarding Trade Secret Infringement Offenses

Building on previous efforts, the government is required to further promote the strengthening of management of technical information, centered on trade secrets and limited provision data. It is important to promote understanding and practice among businesses and research institutions regarding the thorough and appropriate management of trade secrets under the Unfair Competition Prevention Act, and the appropriate management and utilization of limited provision data according to the nature and usage patterns of the data. The Ministry of Economy, Trade and Industry (METI) has been raising awareness nationwide through FY2025 intellectual property rights system briefing sessions for beginners. Awareness has also been raised regarding the importance of appropriate management of trade secrets and limited provision data to industry groups such as the Japan Chamber of Commerce and Industry and the The Association of Corporate Legal Departments, as well as universities.

In addition, at the Public-Private Forum on Trade Secret held annually, practitioners from the public and private sectors exchange information on the current status and challenges of trade secret protection, and the forum is scheduled to continue to be held in the coming year. Through these efforts, we are working not only to raise awareness of

systems and rules, but also to share practical challenges and improve response capabilities.

Going forward, with the recognition that the appropriate management and protection of trade secrets and limited provision data is an indispensable foundation not only for preventing technology leakage but also for supporting healthy technology distribution and international business development, it is required that concerned government ministries and agencies cooperate to support the efforts of businesses and research institutions.

There are also concerns that Japanese companies' legal departments providing technical information in response to requests from foreign authorities may effectively constitute technology leakage. For this reason, it is necessary to examine methods for responding to the disclosure of cutting-edge technical information in response to orders and requests from foreign authorities, and to steadily promote effective technology leakage prevention measures while giving appropriate consideration to the balance with the international utilization of technology and the openness of research activities. On the other hand, some countries and regions have secured strong deterrence through strict criminal sanctions.

Taking into account these international realities and referring to the legal systems of other countries, it is necessary to examine further measures to effectively protect the illicit acquisition of technologies important from the perspective of economic security, and to promote the development and securing of human resources with specialized knowledge in the technology and intellectual property fields within investigative authorities and the strengthening of their organizational capacity, in order to develop investigative capabilities that can respond swiftly and effectively to increasingly sophisticated and elaborate technology leakage cases.

In addition, as the distinction between civilian and defense applications has become extremely difficult in the most advanced technologies, the government is working to leverage the power of startups to strengthen defense capabilities, while also working to strengthen the dual-use startup ecosystem that creates a virtuous cycle in which startups grow through procurement and research, development, and demonstration in the defense sector. In doing so, it is necessary to organize the appropriate protection and utilization of intellectual property related to cutting-edge scientific and technological innovations of startups expected to be applied in the defense sector, and consideration is required that takes into account the balance between security considerations and the smooth utilization of technology.

In these efforts as well, the establishment of a centralized management system for

research and technical information is an indispensable foundation for achieving both the appropriate protection and utilization of sensitive technical information, and it is required to be comprehensively promoted from both the perspectives of security and technological innovation.

<Research Security and Research Integrity>

While the internationalization and openness of research activities are indispensable for the development of science, technology, and innovation, risks of unintended technology leakage and undue influence have become apparent. For this reason, the government has, based on the "Policy on Ensuring Research Integrity in Response to New Risks Associated with the Internationalization and Openness of Research Activities" (decided by the Integrated Innovation Strategy Promotion Council on April 27, 2021) and other measures, required risk management and other measures to fulfill transparency and accountability in research activities at research institutions and universities. Follow-up surveys on efforts to ensure research integrity have confirmed steady improvements in the status of efforts at each institution[8].

In recent years, efforts to ensure research security have been initiated in G7 countries and other like-minded countries, premised on ensuring research integrity. The Cabinet Office has held the "Expert Panel on Ensuring Research Security and Research Integrity," and in December 2025 formulated and published the "Procedures for Efforts to Ensure Research Security," targeting "Specified Research and Development Programs" that require particular prevention of technology leakage from the perspective of economic security, among research and development programs with publicly disclosed results conducted with competitive research funds from the government. Going forward, efforts to promote research security will be advanced in cooperation with concerned government ministries and agencies.

<Prevention of Leakage of Technologies Related to National Security>

For technologies important to national security, new responses are required in addition to conventional export controls, taking into account the risk of military conversion over time and changes in business structures. In particular, as the internationalization of research and development and the globalization of business activities progress, it has been pointed out that research results and technical information may be used in ways not originally anticipated through the passage of time and changes in use and actors.

[8] https://www8.cao.go.jp/cstp/kokusaiteki/integrity/ri_follow-up_fy2025/ri_fu_fy2025_sum.pdf

At METI, based on the interim report of the "Industrial Structure Council, Trade and Commerce Subcommittee, Security Export Control Subcommittee" (April 2024), efforts are being made to appropriately enforce the "Public-Private Dialogue Scheme for Strengthening Technology Management" (enforced in December 2024), including the implementation of public-private dialogues based on advance reports from companies. At the same time, the technologies to be covered are being reviewed as appropriate, taking into account changes in technology trends and the international situation.

In addition, in August 2024, the Cabinet Secretariat and the Cabinet Office notified concerned government ministries and agencies of the need to implement technology leakage prevention measures at each stage from the beginning to the end of research and development for research and development programs with a view to social implementation supported by the government, and to take appropriate measures regarding the overseas transfer of intellectual property rights related to national commissioned research and development to which the Japanese version of the Bayh-Dole Act applies. In 2025, progress was confirmed with concerned government ministries and agencies, and steady implementation of efforts was encouraged.

Furthermore, conventionally, with regard to defense equipment jointly developed by the public and private sectors, technologies containing highly sensitive information were not permitted to be filed for patents under internal regulations of the Ministry of Defense (MOD), even if there was demand from industry. With the commencement of operations of the patent non-disclosure system in May 2024, the Ministry of Defense revised the aforementioned internal regulations to allow patent applications for some highly sensitive technologies from FY2026, and organized its internal structure. Going forward, in light of the revision of the Three Principles on Transfer of Defense Equipment and Technology and other measures, consideration will be advanced regarding the system for handling more highly sensitive technologies in order to protect the technologies of the defense industry.

Going forward, through public-private dialogue and cooperation among concerned government ministries and agencies, it is required to achieve both the healthy promotion of research and development and business activities and the protection of technologies important to national security, and to continuously promote rational and effective technology leakage prevention measures commensurate with the nature and risks of the technologies.

<Regarding KPIs>

The Intellectual Property Strategic Program 2025 set a KPI of "suppressing the

occurrence of information leakage and ensuring information security, etc., to lead to appropriate prevention of technology leakage (monitoring the status of the number of arrested cases or consultations received regarding trade secret infringement offenses)." The number of consultations received by the police regarding trade secret infringement offenses in 2025 was 74 cases (a 6% decrease from the previous year).

(Direction of Measures)

- Based on the "Procedures for Efforts to Ensure Research Security" (December 2025) and other measures, efforts to ensure research security and research integrity at the government, funding agencies, and research institutions will be promoted.
  (Short term and mid term) (CAO (SSTIP), and concerned government ministries)
- Regarding the rules on trade secrets under the Unfair Competition Prevention Act, the appropriate form of the system will be examined from the perspective of victim relief and prevention of overseas leakage, and awareness will continue to be raised toward preventing trade secret leakage by disseminating the "Handbook for Protection of Confidential Information," "What You Should Know About Trade Secrets," and the "Management Guidelines for Trade Secrets."
  (Short term and mid term) (METI)
- Based on the interim report of the "Industrial Structure Council, Trade and Commerce Subcommittee, Security Export Control Subcommittee" (April 2024), the "Public-Private Dialogue Scheme for Strengthening Technology Management" enforced in December 2024 will be appropriately enforced, and continuous investigation and analysis of the technologies to be covered will be conducted, with reviews made as appropriate.
  (Short term and mid term) (METI)
- In light of the revision of the Three Principles on Transfer of Defense Equipment and Technology and other measures, consideration will be advanced regarding the system for handling more highly sensitive technologies in order to protect the technologies of the defense industry.
  (Short term and mid term) (MOD)

(2) Strengthening Countermeasures against Piracy and Counterfeits

(Current Situation and Challenges)

<Piracy>

With the advancement of digitalization and networking, Japan's attractive content, including manga, anime, games, and films, has come to be widely disseminated around

the world. On the other hand, coupled with the high appeal of such content, infringement of copyrights and other rights related to such content is expanding across national borders. In addition to the fact that site operators, servers, and domain registrations are located across borders and services that enable anonymous operation have emerged, methods have become more sophisticated than ever, including the use of domain hopping, making it increasingly difficult to identify site operators.

Along with this situation, piracy damage is also increasing rapidly. According to the Content Overseas Distribution Association (hereinafter "CODA"), the estimated damage from online piracy of Japan-originated content (video, publishing, music, and games) in 2025 was 5.7 trillion yen, and the damage from counterfeit character goods, which was surveyed for the first time, was estimated at 4.7 trillion yen, bringing the total estimated piracy damage to Japan-originated content to approximately 10.4 trillion yen (Figure 20). In particular, the estimated damage from online piracy of Japan-originated content (video, publishing, music, and games) was 2.0 trillion yen at the time of the 2022 survey, expanding approximately threefold in roughly three years to 5.7 trillion yen in 2025 (Figure 20). While the expansion of damage amounts is largely attributable to the impact of fluctuations in exchange rates and prices in recent years, it is also considered to be caused by the increase in the number of internet users and piracy users accompanying the further spread of the internet, and the acceleration of the global penetration of Japan-originated content, which has increased opportunities for Japan-originated content to come to the attention of piracy users (Figure 21).

Online piracy losses	2022 (trillion yen)	2025 (trillion yen)
Video	0.9	2.3
Publishing	0.8	2.6
Music	0.1	0.3
Games	0.1	0.5
Subtotal	2.0	5.7
Character goods	(No data available)	4.7
Total	-	10.4

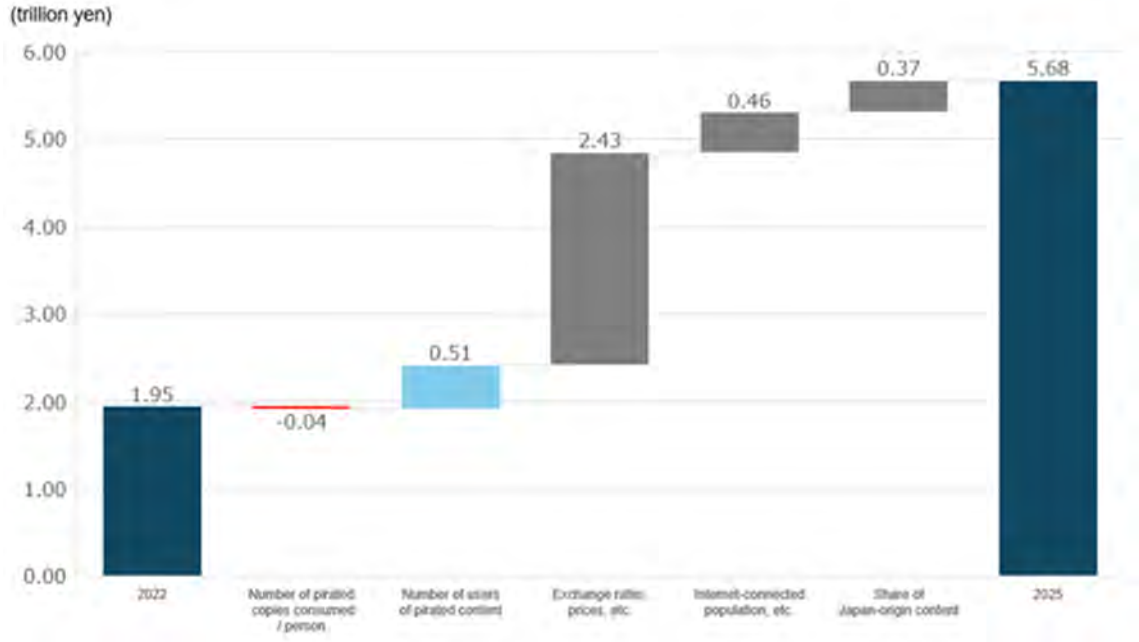
＊Note: This is a comparison of losses for 2022 and 2025, both estimated based on coefficients derived from consumer survey results.

1. Found using a survey-based estimation method from among those used in the 2022 survey.

2. Found using the user-based estimation method applied in the 2025 survey (the same method as in the 2022 survey）

(Source) CODA website

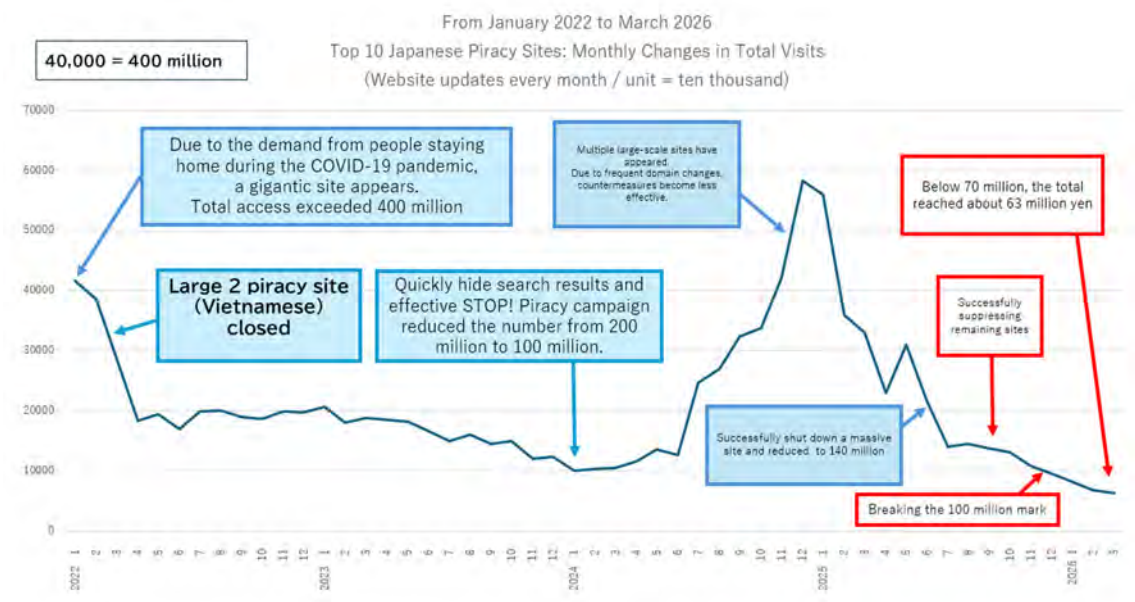
Figure 20: Results of CODA's Survey on Piracy Damage to Japan-Originated Content



(Source) CODA website

Figure 21: Factors Contributing to the Increase in Damages from Digital Content Piracy

Regarding the status of piracy sites for Japanese manga and other content among Japan-originated content, the monthly number of accesses to the top 10 sites targeting Japan approached 600 million accesses in December 2024, exceeding the worst period in the past. However, subsequent countermeasures led to the closure of multiple sites, and in December 2025, the number fell below the 100 million access mark. Nevertheless, as piracy damage still exceeds 60 million accesses, it remains important for the public and private sectors to continue to work together to implement countermeasures (Figure 22).



(Source) Association for Books with Integrity (ABJ), "Status of Illegal Sites for Publications" https://www.abj.or.jp/data

Figure 22: Monthly Changes in Total Number of Accesses to Top 10 Publication Piracy Sites

In recent years, damage from overseas piracy sites targeting overseas audiences has also been expanding, with damage in Vietnam and Indonesia being particularly notable.

Since it is difficult for private sector efforts alone to address piracy on the borderless internet, international cooperation led by the government and the strengthening of international enforcement are important. It is necessary to proceed with responses through public-private cooperation, centered on approaches to domain operators through ICANN (The Internet Corporation for Assigned Names and Numbers) and other channels, prevention of abuse of CDN (Content Delivery Network) services, and local crackdowns (international judicial cooperation), including the use of systems to deter access to piracy sites overseas. Attention also needs to be paid to newly planned top-level domains. Furthermore, it is necessary to promote the development of support systems for rights holders of Japan-originated content to exercise their rights internationally, and the sharing of expertise among specialists.

In November 2025, the Tokyo District Court issued a ruling recognizing that the provision of CDN services to manga piracy sites by the US company Cloudflare, Inc. constituted aiding and abetting copyright infringement, and the government will continue to monitor private sector developments in light of such judicial decisions.

The government has published the "Comprehensive Countermeasure Menu and

Roadmap for Online Piracy" to effectively prevent piracy damage and secure the legitimate interests of copyright holders and others, and has been steadily advancing countermeasures based on this.

In addition, to strengthen cross-ministerial efforts to support proactive private sector initiatives, in September 2024, the government established the Piracy Countermeasures Public-Private Working-Level Liaison Meeting, composed of private sector practitioners and working-level officials from concerned government ministries and agencies engaged in piracy countermeasures, to discuss the sharing of the latest information and connections to specific countermeasures. The meeting has been held four times to date. Going forward, the roadmap of the "Comprehensive Countermeasure Menu for Online Piracy" is to be updated.

In the private sector, for example, proactive efforts have been made against manga piracy, with the publishing industry, IT industry, and experts holding regular discussions. As one example, CODA and the Japan Publishers' Anti-Piracy Council (JPMAC) are engaged in active activities, including crackdowns in cooperation with the public sector, international rights enforcement, and calls for cooperation in piracy countermeasures at various international conferences.

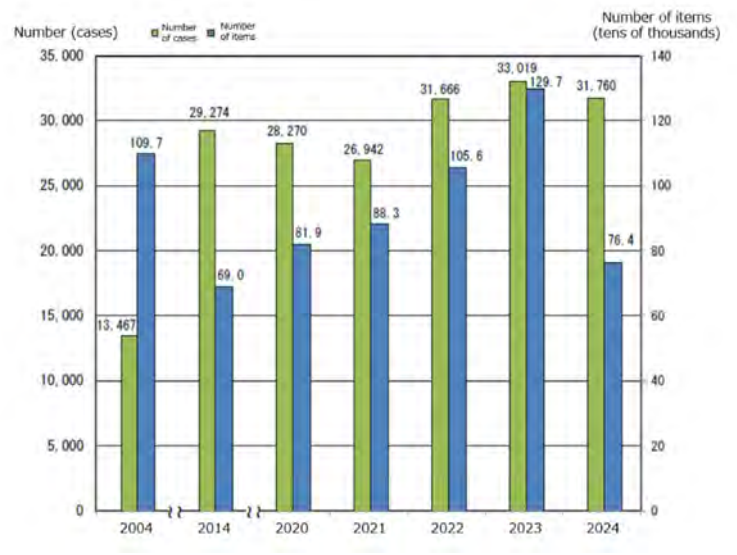
In November 2025, CODA filed a criminal complaint with Chinese public security authorities at the request of Japanese publishers, leading to the closure of the world's largest manga piracy site. In addition, CODA, recognizing the seriousness of rights infringement based in Vietnam, strengthened its countermeasures and opened the "CODA Vietnam Center" in Vietnam on April 1, 2026, in cooperation with a local law firm. It is important to continue working as one, with the public and private sectors united, to eradicate piracy and realize an ecosystem that includes the promotion of legitimate distribution, by organically linking such proactive private sector initiatives with government efforts.

<Counterfeits>

In recent years, the cross-border distribution of counterfeit goods has continued to be a serious challenge due to the expansion of e-commerce and the diversification of logistics. Since counterfeit goods not only undermine the competitiveness of legitimate businesses but also pose risks to consumer safety and trust, it is required that concerned government ministries and agencies cooperate to implement effective countermeasures at each stage of manufacturing, distribution, and importation.

Border enforcement by customs continues to play an important role. The number of cases of seizure of intellectual property infringing goods such as counterfeit brand

goods at customs nationwide in 2025 was 31,760 cases, a 3.8% decrease from the previous year, but has remained at a high level, exceeding 30,000 cases for three consecutive years (Figure 23). In addition, seizures continue of household goods such as water purifier cartridges, electrical products such as batteries and earphones, and automobile accessories that pose risks to health and safety when used[9].



(Source) Ministry of Finance website, "Status of Seizures of Intellectual Property Infringing Goods at Customs in 2025"

Figure 23: Trends in the Number of Seizures of Intellectual Property Infringing Goods

In light of this situation, the government has been working to improve the effectiveness of customs enforcement, promote the use of information provision and application systems by rights holders, and advance counterfeit countermeasures through public-private cooperation. In addition, to facilitate the smooth establishment of system revisions, the government has been working to raise awareness and publicize information to relevant institutions, businesses, and consumers, and has been working to strengthen counterfeit countermeasures through public-private cooperation.

In addition, in recent years, there has been a rapid increase in the distribution of counterfeit goods through advertisements displayed on SNS and other internet platforms that impersonate rights holders or those licensed by rights holders to use intellectual property rights, and purport to sell genuine products, thereby directing users to individual transactions (hereinafter "deceptive redirect advertisements"), requiring new responses. Deceptive redirect advertisements are often displayed to individual users through targeted advertising and other means that display content tailored to users'

[9] https://www.mof.go.jp/policy/customs_tariff/trade/safe_society/chiteki/cy2025/ka20260306.pdf

interests based on their attributes and website browsing history, and are characterized by the difficulty for rights holders to identify and respond to deletion requests. At the destinations of such redirects, in addition to the sale of counterfeit goods disguised as genuine products, sales of unrelated products and unbranded goods, as well as consumer damage from phishing scams and other fraudulent activities, have occurred, posing a major problem not only from the perspective of damage to rights holders' brand value but also from the perspective of consumer protection.

The Japan Patent Office (JPO), in order to widely share the actual state of counterfeit damage caused by deceptive redirect advertisements and to raise specific countermeasure discussions, made a presentation at the APEC Intellectual Property Experts Group (IPEG) meeting held in China in February 2026 on the "Survey on Counterfeit Distribution Using Deceptive Redirect Advertisements on SNS and Other Internet Platforms" conducted by JETRO in FY2024 as a JPO commissioned project, which attracted high interest from each economy. The Ministry of Internal Affairs and Communications (MIC) also published guidelines related to Article 26 of Information Distribution Platform Act (enforced in April 2025) that illustrate examples of what types of information distribution may constitute trademark infringement and other rights violations or violations of laws and regulations[10]. In addition, the International Intellectual Property Protection Forum (IIPPF), a public-private joint forum, established the "SNS Fraudulent Advertising Working Group" in FY2025 and began activities centered on sharing countermeasure examples among participating companies and cooperation with SNS platform operators. Going forward, it is further required to advance efforts such as the institutionalization of countermeasures by SNS platform operators, international cooperation, and consumer awareness-raising in a united public-private effort.

<Regarding KPIs>

The Intellectual Property Strategic Program 2025 set a KPI of "reducing access to publication piracy from within Japan (the lowest in the past five years was approximately 100 million accesses)." Since December 2025, the number of accesses has remained below 100 million as of March 2026.

The Intellectual Property Strategic Program 2025 set a KPI of "promoting border measures to suppress counterfeit damage (monitoring the status of the number of seizures of intellectual property infringing goods at customs)." The number of cases of seizure of intellectual property infringing goods such as counterfeit brand goods at

[10] https://www.soumu.go.jp/main_content/001032102.pdf

customs nationwide in 2025 was 31,760 cases, a 3.8% decrease from the previous year.

(Direction of Measures)

- At the Piracy Countermeasures Public-Private Working-Level Liaison Meeting, composed of private sector practitioners and officials from concerned government ministries and agencies engaged in piracy countermeasures, the government will advance efforts based on the Comprehensive Countermeasure Menu for Online Piracy in a united public-private effort while sharing the latest information, and will update the roadmap on an annual basis.

  (Short term and mid term) (CAO (IP), National Police Agency, MIC, MOJ, MOFA, Agency for Cultural Affairs, METI)

- Not only should people refrain from purchasing piracy and counterfeit goods, but in particular, since viewers may unconsciously view infringing content and thereby benefit infringers, awareness-raising activities by concerned government ministries, agencies, and institutions (including domestic and international alerts and information dissemination regarding intellectual property rights infringement through deceptive redirect advertisements on SNS and other internet platforms) will be promoted so that the norm of not tolerating piracy and counterfeit goods, including infringing content, becomes rooted in the public consciousness.

  (Short term and mid term) (National Police Agency, Consumer Affairs Agency, MIC, MOF, Agency for Cultural Affairs , MAFF, JPO, METI)

- Using AI-powered piracy detection systems, surveys of the status of piracy damage overseas will be conducted, and the automation of rights enforcement through such systems will be examined for practical implementation.

  (Short term and mid term) (Agency for Cultural Affairs)

- Regarding services of various private sector operators used for the operation of and access to piracy sites, such as the deletion or suppression of search results related to piracy by search engine operators, necessary countermeasures will be implemented by promoting cooperation between such private sector operators and rights holders, approaching such private sector operators, and supporting rights holders in exercising their rights.

  (Short term and mid term) (MIC, Agency for Cultural Affairs, CAO (IP))

- Continuous monitoring of the actual state of damage from online piracy of Japanese content will be conducted (including examination of whether it is possible to calculate damage amounts by type, such as whether distribution is targeted at overseas audiences (including distribution to Japan) or exclusively at

domestic audiences within a given country).

(Short term and mid term) (CAO (IP), METI, MOFA, National Police Agency, Agency for Cultural Affairs)

・ Using frameworks such as WIPO and bilateral consultations, and international conferences including ICANN, the government will approach relevant national governments and private sector operators including domain operators to strengthen piracy countermeasures, thereby strengthening international cooperation. In addition, to crack down on operators of overseas piracy sites, the government will promote proactive approaches to foreign relevant authorities, international investigative cooperation, and other efforts, as well as the implementation of digital forensic investigations in cooperation with private sector operators, thereby strengthening international enforcement, and in particular, strengthening countermeasures against piracy in Vietnam and Indonesia.

(Short term and mid term) (CAO (IP), National Police Agency, MIC, MOJ, MOFA, Agency for Cultural Affairs, METI)

・ Countermeasures against Vietnam, Indonesia, and other countries with significant piracy damage will be particularly strengthened, and necessary efforts will be made, including public-private cooperative piracy countermeasures, the establishment of local response bases for piracy countermeasures, and the promotion of legitimate distribution.

(Short term) (CAO (IP), National Police Agency, MOFA, Agency for Cultural Affairs, METI, concerned government ministries and agencies)

・ Under an international cooperative framework (consortium) involving concerned government ministries and agencies and the public and private sectors, including enforcement authorities and diplomatic departments, the government will share the latest efforts and conduct awareness-raising activities in cooperation with each country, thereby developing an environment in which rights holders can smoothly exercise their rights. In addition, efforts to support domestic rights holders in exercising their rights against cross-border copyright infringement on the internet will be enhanced.

(Short term and mid term) (Agency for Cultural Affairs)

・ As a response to illegal and harmful information on SNS and other internet platforms, effective countermeasures against platform operators will be promoted, such as the appropriate operation of the Information Distribution Platform Act, which obligates large-scale platform operators to expedite deletion responses and enhance the transparency of their operations.

(Short term and mid term) (MIC)

- Based on the interpretation that even overseas piracy sites may be subject to criminal punishment under Japan's Copyright Act if the transmission is directed at the Japanese public and is recognized as having a close connection with Japan, the government will promote efforts in cooperation with rights holder organizations and concerned government ministries and agencies, and investigations utilizing frameworks such as international mutual legal assistance, toward early arrests. In addition, awareness will be raised regarding the applicability of current criminal regulations under the Act on Prevention of Transfer of Criminal Proceeds and the Act on Punishment of Organized Crimes, and regarding the concept of civil claims related to advertising revenue generated from piracy.

(Short term and mid term) (National Police Agency, MOJ, MOFAs, Agency for Cultural Affairs, METI)

- In response to the increasing sophistication and diversification of overseas piracy sites targeting people in local countries distributing Japanese content, the government will promote efforts in a united public-private effort, including high-level approaches including heads of state and foreign ministers, support for strengthening intellectual property rights protection (piracy countermeasures) through the use of ODA, awareness-raising in local languages through overseas diplomatic missions, examination of the appropriate form of incentives for providing information on piracy sites, and promotion of a healthy ecosystem including the promotion of legitimate distribution of Japanese content in overseas markets.

(Short term and mid term) (CAO (IP), MOFA, Agency for Cultural Affairs, METI)

- Regarding services of various private sector operators used for the operation of piracy sites, such as the suspension of service provision to piracy sites by CDN service operators, necessary countermeasures will be implemented by approaching such private sector operators.

(Short term and mid term) (MIC, CAO (IP), concerned government and agencies)

- The status of new issuances of top-level domains will be appropriately monitored through public-private cooperation, and as necessary, the sharing of expertise for rights holders of Japan-originated content to take international action will be promoted.

(Short term and mid term) (MIC, METI, Agency for Cultural Affairs, CAO (IP))

- To develop an environment in which rights holders can effectively exercise their rights, the appropriate form of enhancement and strengthening of evidence collection procedures such as the investigation system will be examined, and necessary examination will be conducted regarding the possibility of expanding such procedures to copyright and trade secrets, and the appropriate form of responses to evidence located overseas.

  (Short term and mid term) (CAO (IP), Agency for Cultural Affairs , METI, JPO)
- To prevent the distribution of counterfeit goods of branded Japanese agricultural, forestry and fishery products and food products overseas, infringement countermeasures against unauthorized use will be promoted through the promotion of mutual protection of geographical indications (hereinafter "GI") with foreign countries, surveys of overseas local markets and EC (electronic commerce) sites, and the operation of a consultation desk for suspected counterfeit information on agricultural, forestry and fishery products and food products.

  (Short term and mid term) (MAFF, MOF, JPO)
- Through amendments to Annex 14-B (Table of Geographical Indications) of the Japan-EU EPA and the Japan-UK EPA, Japanese agricultural products and alcoholic beverages protected as GIs will be added.

  (Short term and mid term) (MOFA)
- To respond to the increasing influx of counterfeit goods and pirated copies in small-lot imported cargo due to the rapid increase in cross-border e-commerce, the government will promote a fundamental transformation of customs enforcement methods and systems to comprehensively inspect imported cargo, and relevant institutions and ministries and agencies will cooperate to implement strict border enforcement against counterfeit goods and pirated copies. In addition, efforts will continue to be made to provide sufficient public relations and other information so as not to cause unexpected damage to good-faith importers. Furthermore, taking into account the expansion of the scope of customs enforcement under the revised Trademark Act, Design Act, and Customs Act enforced in 2022, necessary examination will be conducted regarding other intellectual property rights as well.

  (Short term and mid term) (MOF, JPO,Agency for Cultural Affairs)

（3） Strengthening the Industrial Property Rights System and Its Operation

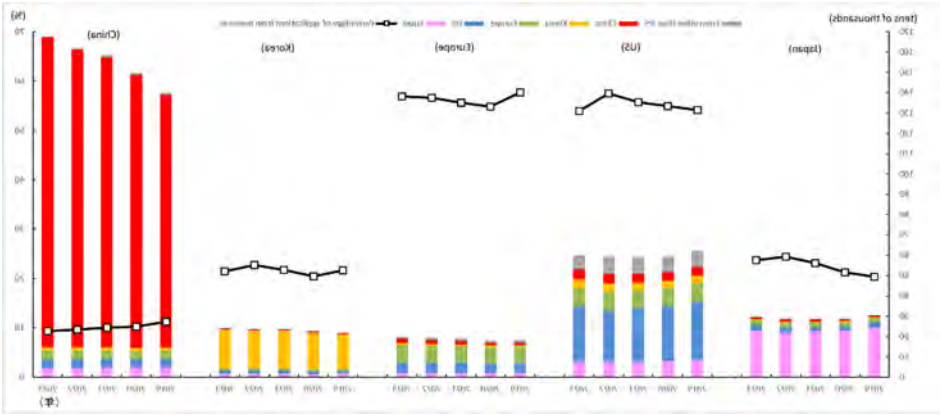
(Current Status and Challenges)

<Responding to the Global Era and the DX Era>

As digital technology advances and economic activities become increasingly

globalized, cross-border research and development and business activities have become commonplace, and there is a growing need for the industrial property rights system to respond to international harmonization and new technological trends. Against this backdrop of environmental change, Japan's industrial property rights system must be continuously reviewed and its operation enhanced from the perspective of securing international competitiveness and improving predictability for users.

Looking at current patent application trends, patent applications among the Five Offices (Japan, the United States, China, Korea, and Europe) continue to be active, with overseas applications by Japanese companies and applications to Japan by foreign companies remaining at a certain level (Figure 24). These trends demonstrate that companies' research and development and business activities are being conducted on a global scale, underscoring the importance of developing systems and operations that reflect international institutional trends.



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

Figure 24: Status of Patent Applications to the Five Offices

In this context, the Patent System Subcommittee has been continuously discussing the appropriate protection of rights for network-related inventions in international business activities. With the increase in services provided via networks and configurations where servers are located overseas, ensuring predictability regarding under what circumstances the working of a patented invention can be deemed to have occurred domestically has become a challenge. For this reason, it is necessary to clarify the requirements for recognizing working as substantially domestic, including from the perspective of whether the technical and economic effects of the invention are manifested domestically.

The Design System Subcommittee is also examining the appropriate form of the

design system in light of the advancement of virtual spaces and the metaverse. Under the current system, protection has centered on physical articles and certain images, but as design creation and transactions in virtual spaces expand, the need to clarify the relationship with the current system and to address this institutionally has been pointed out. Therefore, discussions are desired on how designs in virtual spaces should be positioned under the design system, taking into account actual usage and international trends.

Furthermore, in order to secure competitive advantage in global markets, it is important to obtain patent rights and other intellectual property rights in a timely manner in each country while keeping an eye on standardization trends from the early stages of research and development. In particular, as digitalization and technological convergence accelerate the cycle of research and development, standardization, and commercialization, the intellectual property system is also required to flexibly support rights acquisition that is consistent with business strategies and standardization strategies. Against this backdrop, the Japan Patent Office (JPO) has introduced a standardization strategy-responsive examination system, in which applicants explain the positioning of their technology in standardization activities and business operations and share their understanding with examiners as the examination proceeds, thereby supporting the acquisition of rights for standard-related inventions with an appropriate scope and timing. In addition, by promoting the use of the Patent Prosecution Highway (PPH), which leverages domestic examination results to enable rapid and efficient examination overseas, it is expected that early rights acquisition in each country in international markets where standardization is advancing will be realized, contributing to strengthening the international competitiveness of Japanese companies.

Moreover, while pharmaceutical data protection has been legislated in Europe, the United States, and other countries, Japan does not have a law directly stipulating pharmaceutical data protection, and the re-examination system (Article 14-4 of the Act on Securing Quality, Efficacy and Safety of Products Including Pharmaceuticals and Medical Devices) effectively serves the role of pharmaceutical data protection. It has been pointed out that, because an independent pharmaceutical data protection system does not exist, those unfamiliar with the system may perceive that Japan has no pharmaceutical data protection system. For this reason, in preparation for the next round of discussions on amendments to the Act on Securing Quality, Efficacy and Safety of Products Including Pharmaceuticals and Medical Devices and related legislation, it is required that relevant industry associations and others consolidate their views, and that

continued investigation and analysis be conducted on the necessity of legislating a pharmaceutical data protection system.

<Development of Infrastructure for Resolving Intellectual Property Disputes>

For the industrial property rights system to function effectively, it is essential not only to acquire and utilize rights, but also to develop an environment in which disputes can be resolved promptly and appropriately when infringement occurs. Looking at the current situation, the proportion of judgments with recognized damages of 100 million yen or more in patent infringement damages lawsuits (Tokyo District Court and Osaka District Court) has been on an increasing trend, attracting attention from the perspective of the effectiveness of rights enforcement (Figure 25). In 2025, judgments with recognized damages exceeding 20 billion yen were issued, and the maximum amounts have also been increasing. The number of newly received civil ordinary litigation cases related to intellectual property rights has remained flat, while the number of appeal cases against trial decisions has been declining (Figure 26). Furthermore, looking at the breakdown of civil ordinary litigation cases related to intellectual property rights, the number of copyright-related cases has been on an increasing trend, while the number of patent-related cases has been on a decreasing trend (Figure 27).

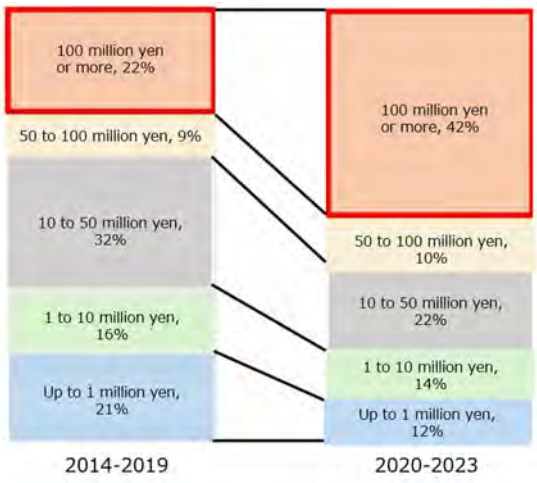
In light of these circumstances, it is essential to enhance the effectiveness of deterring intellectual property infringement and to develop an environment in which disputes can be resolved promptly and appropriately when infringement occurs. With reference to the situations in other countries, it is required to examine the appropriate form of civil remedies to ensure recovery of damages and disgorgement of infringer's profits, the construction of mechanisms to facilitate rights enforcement by consolidating intellectual property rights held by multiple rights holders, the facilitation of evidence collection by rights holders, the extension of such measures to copyrights and trade secrets, and the appropriate institutional arrangements with a view to addressing evidence located overseas.

While the method of calculating damages was revised by the 2019 amendment to the Patent Act and other laws, it is required to continue to verify the effects through analysis of court precedents and further analyze the actual state of infringement, and to examine the necessity of further measures to deter infringement and the appropriate institutional arrangements for deterring intellectual property infringement. In addition, the certified expert system introduced at the same time has not been implemented since its introduction. Since various possibilities can be considered as factors, such as the strictness of procedural requirements, the burden of costs, and insufficient awareness

and understanding of the system, it is necessary to carefully analyze and examine the causes through hearings with rights holders and practitioners. Based on this, it is required to understand the actual state of operation and challenges of the system, and to consider improvement measures as necessary.

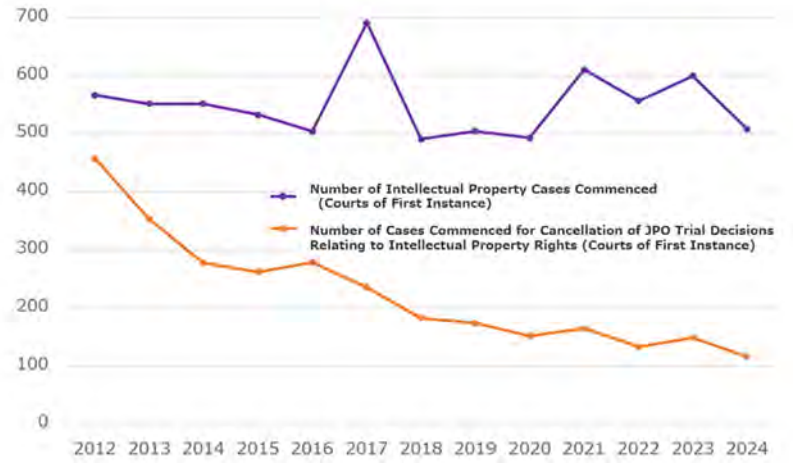
On the other hand, in developing such dispute resolution infrastructure, it is important to adopt a system design perspective that positions infringement claims not as a last resort in confrontation, but as the starting process for business negotiations. It is required to create an environment that promotes constructive dialogue between parties, including promoting the use of alternative dispute resolution (ADR) such as mediation and arbitration, so that intellectual property disputes can function as a starting point for license negotiations, alliance formation, and even the creation of new markets.

By steadily advancing these efforts toward deterring infringement, enhancing the effectiveness of intellectual property rights, and developing an environment in which the fruits of innovation are appropriately protected, it is expected to promote the motivation for creation and innovation in Japan and lead to the realization of sustainable innovation based on strong intellectual property rights.



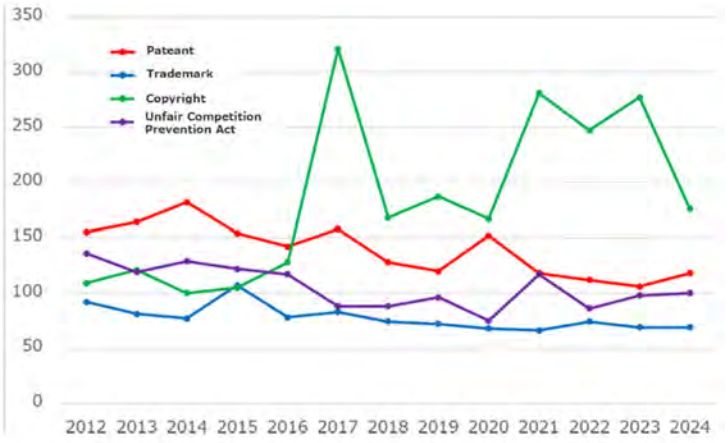
(Source) Prepared by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters based on "Hoso Jiho" (The Law Times) published by Hoso-kai

Figure 25: Recognized Damages in Patent Infringement Damages Lawsuits (Tokyo District Court and Osaka District Court)



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

Figure 26: Number of Newly Received Civil Ordinary Litigation Cases Related to Intellectual Property Rights and Appeal Cases Against Trial Decisions

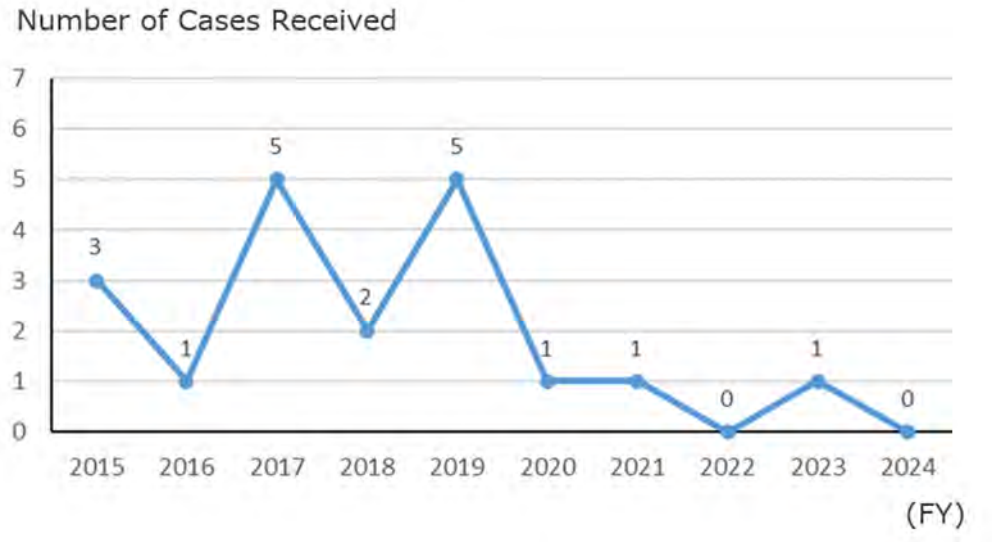


(Source) Prepared by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters based on "Hoso Jiho" (The Law Times) published by Hoso-kai

Figure 27: Number of Newly Received Civil Ordinary Litigation Cases Related to Intellectual Property Rights (District Courts) (by Type)

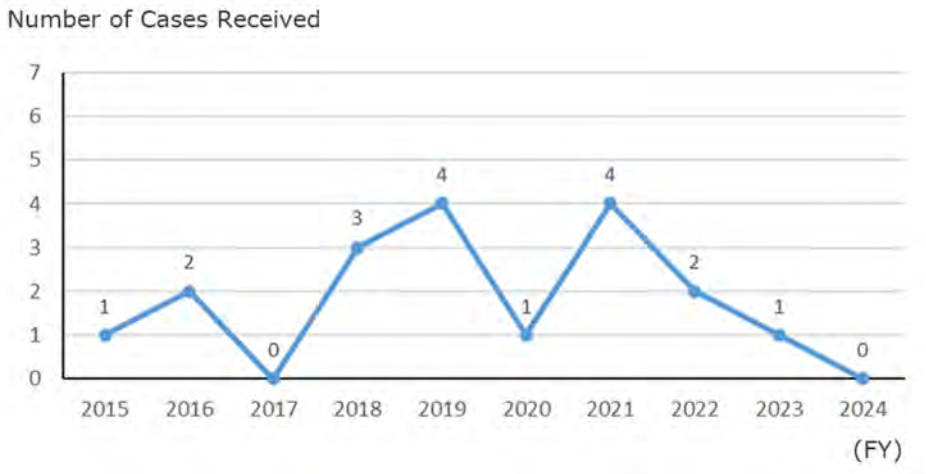
Meanwhile, the promotion of ADR is also important in addition to court proceedings, and efforts are being made to achieve flexible resolution tailored to the actual circumstances of the parties. Regarding the use of private ADR for intellectual property rights, the number of cases accepted by the Japan Intellectual Property Arbitration Center and the number of ADR cases accepted by the Japan Federation of Bar Associations' "ADR (Alternative Dispute Resolution) Center" have remained at only a few cases (Figures 28 and 29). In addition, the Tokyo District Court and the Osaka

District Court have been operating specialized mediation for resolving intellectual property disputes since 2019. Approximately 60% of intellectual property mediation cases are concluded with a settlement, and approximately 60% of intellectual property mediation cases are concluded within three sessions (as of the end of July 2025) (Figure 30). Further expansion of the use of these procedures is expected in the future.



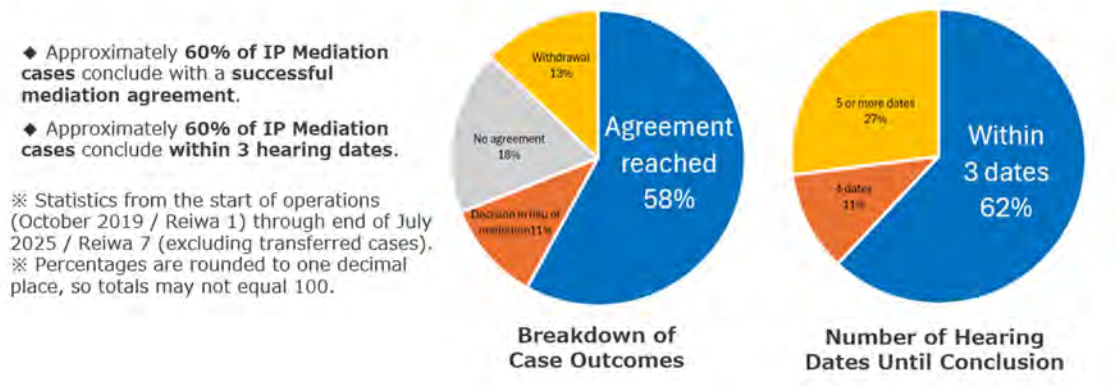
(Source) Prepared by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters based on the Ministry of Justice's "Number of Cases Handled by Certified Dispute Resolution Businesses"

Figure 28: Number of Cases Accepted by the Japan Intellectual Property Arbitration Center



(Source) Prepared by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters based on the Arbitration ADR Statistical Yearbook (Japan Federation of Bar Associations)

Figure 29: Number of ADR Cases Related to Intellectual Property Rights Accepted (Japan Federation of Bar Associations)



(Source) Courts of Japan website, "Topics on Trials (Are You Aware? Intellectual Property Mediation)"

Figure 30: Results of Intellectual Property Mediation

In recent years, with the permeation of IoT technology, disputes over standard essential patents (SEPs), which are patents essential for implementing communication and other standard specifications, have tended to become more complex and prolonged in relation to international business activities. Therefore, it is important to develop a dispute resolution environment with predictability and effectiveness in both court proceedings and ADR. Looking at SEP litigation in Japan (patent infringement litigation based on SEPs), the Grand Panel judgment in the Apple v. Samsung case was handed down in 2014, and three judgments were handed down in 2025.[11]

In parallel with the accumulation of such judicial decisions, the Tokyo District Court published in January 2026 the Guidelines for Proceedings in Patent Infringement Litigation Based on SEPs and the Guidelines for Proceedings in SEP Judicial Mediation (SEPJM), from the perspective of facilitating the smooth resolution of disputes related to SEPs. These guidelines set out the form of litigation and mediation procedures with a view to reaching agreement on FRAND royalties (Global FRAND royalties) for the entire global SEP portfolio held by the SEP holder, including the relevant SEP, in light of the fact that the implementation of SEPs inevitably crosses national borders due to the international spread of standard specifications. The court also commenced the operation of SEP mediation based on these guidelines in February 2026. SEP mediation is intended to achieve rapid and highly specialized dispute resolution with the involvement of judges and experts with specialized knowledge in intellectual property rights, and is positioned as contributing to the enhancement of intellectual property dispute resolution infrastructure through the appropriate functioning of both court

[11] Pantech v. ASUS litigation (Tokyo District Court, Reiwa 4 (Wa) No. 7976), Pantech v. Google litigation (Tokyo District Court, Reiwa 5 (Wa) No. 70501, Osaka District Court, Reiwa 5 (Wa) No. 7855)

proceedings and ADR.

Meanwhile, in the United States, the United States Patent and Trademark Office (USPTO) announced in December 2025 that it would establish a working group on SEPs. This working group is intended to operate for the purposes of promoting predictable enforcement of patent rights including SEPs, promoting participation in the standardization process, and improving transparency among stakeholders. As part of these efforts, the launch of a pilot program (SPARK) in January 2026 was announced, which allows small and medium-sized enterprises and universities participating in standardization activities to receive expedited examination of patent applications and expedited proceedings before the Patent Trial and Appeal Board (PTAB). The purpose is to encourage participation by small and medium-sized enterprises and universities in the standardization process by having the USPTO provide measures that contribute to the recovery of time and investment spent on the standardization process.

In Europe, the Automotive Licensing Negotiation Group (ALNG) has been formed by automotive-related companies that are SEP implementers to jointly negotiate licensing terms. The European Commission has determined that the activities of this group in negotiating licensing terms do not violate Article 101 of the Treaty on the Functioning of the European Union under certain conditions[12], and new efforts toward preventing and facilitating the resolution of disputes are progressing.

Furthermore, Chinese companies have been expanding their SEP holdings, particularly in 5G-related standards, and are strengthening their negotiating power as rights holders. This trend of Chinese companies transitioning from the implementer (licensee) side to the rights holder (licensor) side of SEPs is significantly transforming the landscape of international rights enforcement and license negotiations surrounding SEPs, requiring new responses from implementers including Japanese companies.

Japan should also pay close attention to international discussions and practical developments regarding dispute resolution and institutional operation surrounding SEPs, and work to develop an environment with high predictability and effectiveness.

<Strengthening Intellectual Property Management in Research and Development Projects Supported by the Government and Other Entities>

In research and development projects supported by the government and other entities, efforts have been made to promote the smooth acquisition and utilization of rights from research results through the introduction of the Japanese version of the Bayh-Dole system, the formulation of operational guidelines on intellectual property management

[12] https://ec.europa.eu/commission/presscorner/detail/en/ip_25_1768

in commissioned research and development, the understanding of intellectual property status through public solicitation, evaluation, and results reporting, and the development of intellectual property agreements and other measures.

At the 1st Japan Growth Strategy Headquarters meeting in November 2025, 17 strategic fields including AI and semiconductors, quantum, and biotechnology were designated as "crisis management investments" and "growth investments," and comprehensive support including international expansion support and human resource development centered on these fields is being considered, including the amendment of the Act for Strengthening Industrial Technology Capabilities (March 2026), which includes measures to promote the utilization of dormant patents in key industrial technologies. These fields are competitive areas that are also prioritized as strategically important technologies in other countries, and strategic intellectual property management based on prior art searches from the early stages of research and development is essential for acquiring technology and advancing business development while avoiding infringement of others' intellectual property rights.

Against this backdrop, the 7th Science, Technology and Innovation Basic Plan formulated in March 2026 explicitly states that, for research and development investments supported by the government and other entities, prior investigations into whether others' rights are being infringed and appropriate acquisition of intellectual property should be conducted, taking into account the content of each ministry's research and development evaluation guidelines and the University Intellectual Property Governance Guidelines.

Going forward, in the midst of intensifying international competition, in order to connect the results of research and development investments supported by the government and other entities to the realization of a strong economy, it is expected that strategic intellectual property management contributing to social implementation will be thoroughly pursued, including reducing infringement risks based on prior art searches and acquiring intellectual property in a timely and appropriate manner, and that intellectual property rights with both quality and quantity will be created, protected, and utilized.

<Regarding KPIs>

The Intellectual Property Strategic Program 2025 set a KPI of "promoting the enhancement of the dispute resolution system toward an internationally attractive intellectual property system and framework (monitoring the trend of increasing recognized damages since 2019, monitoring the number of ADR cases accepted, etc.)."

The proportion of judgments with recognized damages of 100 million yen or more in patent infringement damages lawsuits (Tokyo District Court and Osaka District Court) increased from 22% (2014-2019) to 42% (2020-2023). On the other hand, the number of recently accepted intellectual property-related ADR cases has been on a declining trend, with 2 cases in FY2022, 1 case in FY2023, and 0 cases in FY2024.

(Direction of Measures)

- Taking into account the entry into force in April 2024 of the amended Arbitration Act and related legislation, which aims to create an environment in Japan where international arbitration—a fair and equitable means of resolving global legal disputes including intellectual property disputes—can be utilized, and based on the guidelines formulated in May of the same year at the "Liaison Conference of Ministries and Agencies Concerned with the Promotion of International Arbitration" further efforts will be promoted, including the development of arbitration human resources based in Japan and awareness-raising activities both domestically and internationally.

  (Short term and mid term) (MOJ, concerned government ministries)

- International conferences on the theme of intellectual property-related disputes will be held with judicial officials from Asian countries, along with follow-up seminars, to improve dispute resolution capacity across the Asian region. International conferences will also be held with judicial officials from Europe and the United States to promote international cooperation in intellectual property dispute resolution, and information on intellectual property dispute resolution will be provided to Japanese legal professionals and private companies.

  (Short term and mid term) (MOJ, JPO)

- Online dispute resolution (ODR), which uses digital technology to conduct ADR online, will be promoted to provide diverse dispute resolution means to those facing intellectual property and other issues. Efforts will also be made to advance research on advanced overseas ODR, raise awareness and publicize ADR and ODR, and strengthen cooperation and coordination between certified ADR operators and relevant organizations, thereby further expanding and activating ADR and ODR.

  (Short term and mid term) (MOJ)

- Regarding the translation of laws and regulations into foreign languages, the active use of AI-powered legal translation systems and efficient and thorough quality checks of draft translations will expand and accelerate the provision of

high-quality English translations, and English translations of laws and regulations related to intellectual property, a priority translation field, will be actively disseminated overseas.

(Short term and mid term) (MOJ)

- In order to support the development and operation of legal systems for intellectual property rights enforcement in emerging countries and other nations, and to establish effective judicial procedures, training will be provided to judicial officials and others to support the development of intellectual property judicial human resources in emerging countries and other nations.

(Short term and mid term) (MOJ, MOFA)

- From the perspective of facilitating the resolution of SEP-related disputes and enhancing international intellectual property dispute resolution infrastructure, efforts will be promoted to disseminate and embed the guidelines for proceedings in SEP mediation and patent infringement litigation based on SEPs.

(Short term and mid term) (MOJ)

- To facilitate SEP license negotiations, the "Guide to License Negotiations for Standard Essential Patents," revised in 2022, will continue to be disseminated.

(Short term and mid term) (JPO)

- With reference to efforts in other fields to consolidate and enforce intellectual property rights in a unified manner, mechanisms to enable collective and organized rights enforcement will be examined.

(Short term and mid term) (CAO (IP), Agency for Cultural Affairs , concerned government ministries)

- Based on the verification of the effects of the 2019 amendment to the Patent Act and other laws regarding the method of calculating damages through analysis of court precedents and further analysis of the actual state of infringement, the appropriate form of civil remedies to ensure recovery of damages and disgorgement of infringer's profits will be examined with reference to similar systems in other countries, and necessary measures will be taken based on the results.

(Short term and mid term) (JPO, METI, Agency for Cultural Affairs , CAO (IP), MOJ)

- In order to maintain the speed of patent examination even as the number of applications related to AI-related technologies surges, measures will be taken to supplement the number of examiners and improve their capabilities, including proficiency in multiple technical fields, and the examination system will be

developed so as to maintain the "examination period until rights acquisition" (standard examination period) from the filing of a request for examination at "an average of 14 months or less" in FY2033 as well.

(Short term and mid term) (JPO)

- In order to further improve the quality of patent examination, measures to promote patent examination innovation will be examined, including improvement of measures based on co-creation with users and thorough efficiency improvements including the use of AI technology in the patent examination process, and necessary measures will be taken.

(Short term and mid term) (JPO)

- A "Trilateral AI Vision" will be jointly formulated by the trilateral patent offices of Japan, the United States, and Europe, with the aim of achieving a common understanding among the three offices regarding the use of AI technology in the patent examination process.

(Short term and mid term) (JPO)

- In order to create an environment in which Japanese companies can obtain patent rights overseas with high predictability, as part of international examination cooperation, efforts will be made to share information that contributes to the smooth operation and quality improvement of examination practices, particularly for emerging countries, by providing prior art search results and other information using Japan's outsourced prior art search mechanism and AI technology.

(Short term and mid term) (JPO)

- Specific efforts will be made to raise awareness of the importance of design and to effectively disseminate information about the design system.

(Short term and mid term) (JPO)

- In addition to the increased burden on trademark examination as the examination of applications subject to the consent system and other provisions introduced by the amended Trademark Act that came into force in April 2024 becomes full-scale, and in the context of an increasing trend in the number of applications, efforts will be made to improve the efficiency of trademark application examination processing and enhance the examination system, including by promoting applications that do not attract reasons for refusal and utilizing the trademark refusal reason cross-examination project, so as to achieve an "examination period until rights acquisition" and a "period until first office action" of an average of 7 to 9 months and an average of 5.5 to 7.5 months, respectively, in FY2026. In addition, awareness of the importance and utilization methods of trademarks will be

strengthened to promote the dissemination and penetration of the trademark system.

(Short term and mid term) (JPO)

- In order to support the global expansion of Japanese companies into emerging country markets, which are expected to expand further in the future, training and other activities will be conducted for intellectual property human resources in emerging countries and other nations, including JPO examiners and patent attorneys as instructors, utilizing online lectures as well, thereby supporting the development of an environment in which industrial property rights can be appropriately acquired and enforced in emerging countries and other nations from the perspective of human resource development. In addition, support for accelerating and improving the quality of patent examination will be strengthened in emerging countries such as those in Southeast Asia, through approaches such as expert meetings, so that the intellectual property rights of Japanese companies are promptly and accurately protected.

(Short term and mid term) (JPO)

- Regarding the Riyadh Design Law Treaty, awareness-raising activities for domestic users and solicitation of needs regarding accession to the treaty will continue to be advanced, and examination of domestic legal development and accession to the treaty will be conducted.

(Short term and mid term) (JPO, MOFA)

- As the advancement of generative AI technology and the expansion of transactions in virtual spaces diversify business activities, and as DX in corporate activities progresses, new challenges are arising in the industrial property rights system. In addition, further improvements in the convenience of administrative procedures are required. Taking these factors into account, the appropriate form of the industrial property rights system for the DX era will be examined.

(Short term and mid term) (JPO)

- Regarding the working of inventions across national borders in network-related inventions, examination will continue to be advanced at the Patent System Subcommittee of the Intellectual Property Committee of the Industrial Structure Council, with a view to organizing and publishing a certain way of thinking based on the current law.

(Short term and mid term) (JPO)

- Taking into account the actual state of business and design creation in virtual spaces, examination will continue to be advanced at the Design System

Subcommittee of the Intellectual Property Committee of the Industrial Structure Council regarding the necessity of revising the design system and the direction of institutional measures.

(Short term and mid term) (JPO)

- Research and development investments supported by the government and other entities shall, in accordance with the purpose of the project, conduct prior investigations into whether others' rights are being infringed and appropriate acquisition of intellectual property, so that the results contribute to the realization of a strong economy. To this end, first, regarding competitive research funds, in accordance with the purpose of the project, applicants shall be required to report on their intellectual property status, including the status of prior art searches and the formulation of intellectual property strategies at their affiliated institutions, when submitting applications, so that this information can be used as a reference in the evaluation of research project selection. Applicants shall also be required to report on the status of implementation of intellectual property-related efforts, including the acquisition of intellectual property in accordance with their intellectual property strategy, in their results reports. Necessary responses will be examined and specific measures will be taken. Similarly, necessary responses will also be examined and specific measures will be taken for research and development investments supported by the government and other entities other than competitive research funds.

(Short term and mid term) (CAO (IP, SSTIP), MEXT, METI, concerned government ministries)

（4） Regional Intellectual Property Protection

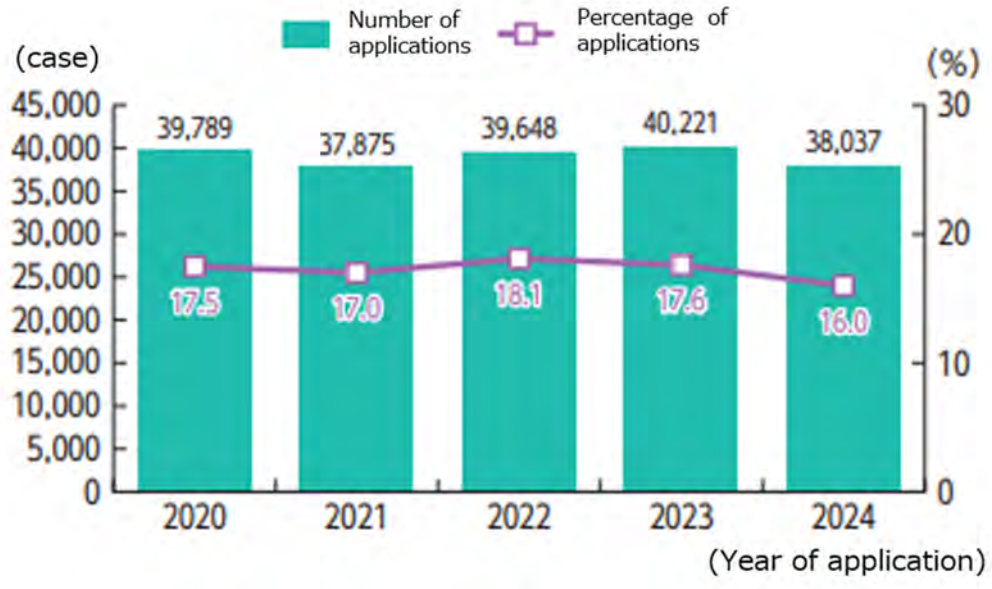
(Current Status and Challenges)

<Small and Medium-sized Enterprises (SMEs) and Mid-sized Enterprises>

Intellectual property (IP) is a source of competitiveness for SMEs and mid-sized enterprises that support regional economies, and is an indispensable management resource for sustainable business growth and value creation. At the same time, it has been pointed out that SMEs and mid-sized enterprises with limited management resources and human capital have not sufficiently advanced the strategic acquisition and utilization of IP. For this reason, it is necessary to further promote efforts to link IP to business management under a support system rooted in local communities.

Looking at current data, the number of patent applications filed by SMEs in 2024 was approximately 38,000 (Figure 31), accounting for approximately 16% of all patent

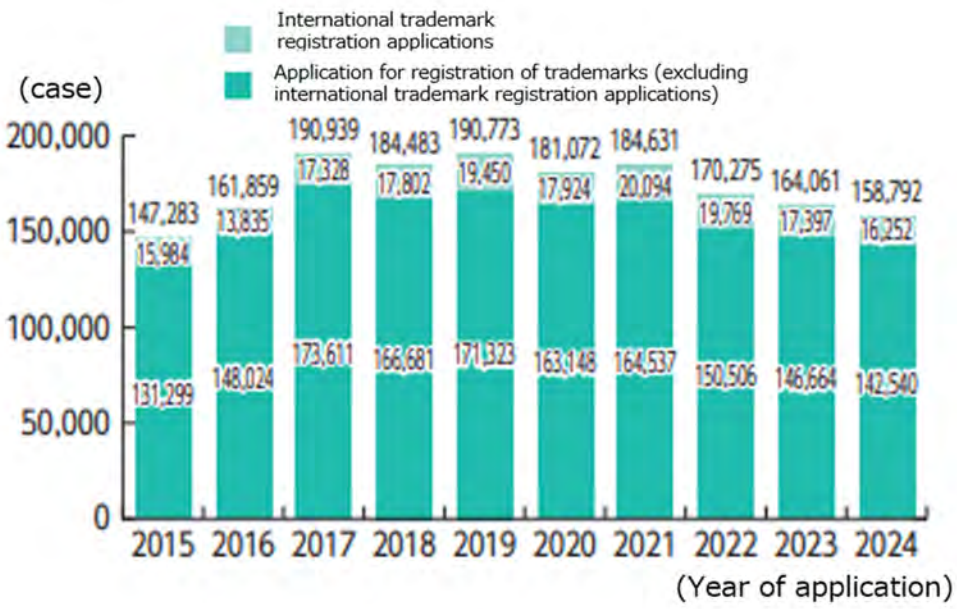
applications filed by domestic applicants (approximately 237,000). While the number of patent applications by SMEs has remained roughly flat in recent years, given that SMEs account for approximately 99% of all companies, the number of SMEs actually filing patent applications remains limited.



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

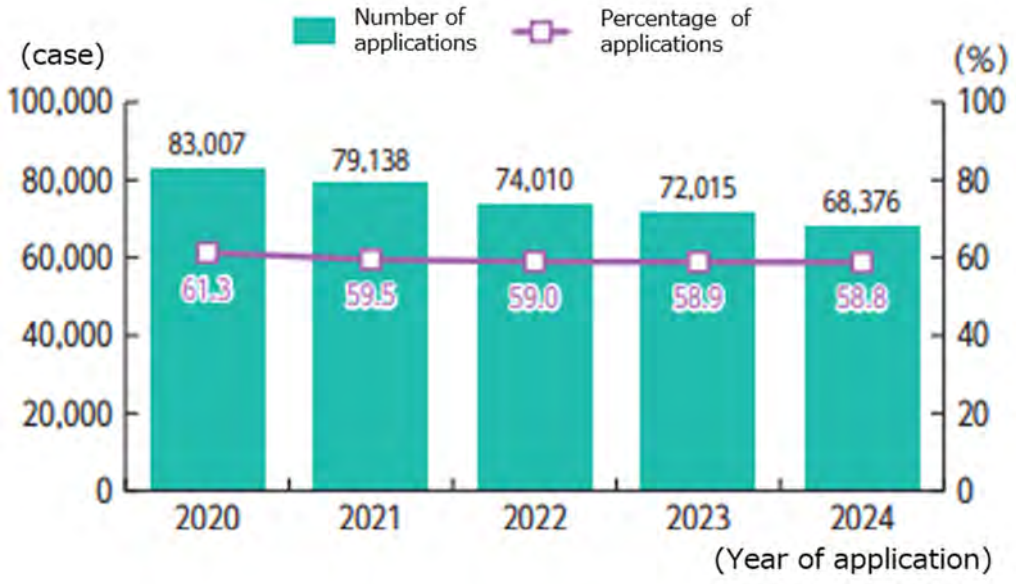
Figure 31: Trends in the Number of Patent Applications Filed by SMEs

In addition, the number of trademark registration applications in 2024 was 158,792, a decrease of 3.2% from the previous year, continuing a decline since 2021 (Figure 32). Furthermore, the number of trademark registration applications by SMEs in 2024 was 68,376, a decrease of 5.1% from the previous year, continuing a decline since 2020 (Figure 33). While trademarks are a relatively accessible form of IP for SMEs and mid-sized enterprises and play an important role in regional branding and new business development, the recent decline in the number of applications suggests that the use of IP in business development may not be sufficiently widespread.



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

Figure 32: Trends in the Number of Trademark Registration Applications



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

Figure 33: Trends in the Number of Trademark Registration Applications by SMEs

As described above, while IP activities by SMEs and mid-sized enterprises are being conducted to a certain extent, only a limited number of companies are continuously linking IP to their management strategies and utilizing it. In light of this situation, it is

necessary to continue promoting IP protection and utilization support tailored to regional conditions, while taking into account the efforts that have been made to support IP management for SMEs and mid-sized enterprises through the development of regional support systems, as well as the fact that the Japan Patent Office (JPO) has set a target for FY2025 of having at least 14,000 SMEs newly file patent applications or other IP applications. With regard to the support system, a broad, industry-wide support structure for SMEs has been established across various fields, including the "IP Management Support Network" comprising the JPO, the Small and Medium Enterprise Agency (SMEA), the National Center for Industrial Property Information and Training (INPIT), the Japan Patent Attorneys Association (JPAA), and the Japan Chamber of Commerce and Industry (JCCI); the "Lawyers IP Net" operated by the Japan Federation of Bar Associations; and the "Agricultural IP Comprehensive Support Desk" of the Japan Agricultural Technology Foundation (JATAFF).

① Regional IP Management Support Model Area Development Project

As an initiative to support regions, the JPO has been implementing the "Regional IP Management Support Model Area Development Project" since FY2024 in three regions—Aomori Prefecture, Ishikawa Prefecture, and Kobe City—by designating municipalities (regions) that are enthusiastic about corporate growth and regional revitalization through IP utilization as "IP Priority Support Areas" and dispatching project producers to those regions. In FY2025, three additional regions—Aichi Prefecture, Yamaguchi Prefecture, and Kumamoto City—have been added to the project. The JPO will continue to work toward creating regions that aim to promote sustainable IP utilization (IP Management Support Model Areas), thereby enhancing the earning power of regions through IP utilization.

② IP Management Support Network

In order for SMEs and mid-sized enterprises to link IP to their management and utilize it effectively, support that is coordinated with management, finance, and regional policy, in addition to specialized IP knowledge, is indispensable. To this end, the government has been working to build and enhance an IP Management Support Network in which diverse support entities collaborate at the regional level.

Specifically, through the Regional IP Management Support Model Area Development Project, a total of 38 SMEs and other entities in six regions are receiving hands-on IP management support through collaboration among IP Management Support Network member organizations and other regional support institutions. In addition, the IP offices

of each Regional Bureau of Economy, Trade and Industry are implementing a total of eight collaborative initiatives with regional IP Management Support Network member organizations, providing IP management support tailored to regional conditions.

Furthermore, in six regions, efforts are being made to improve IP management literacy among members of the regional IP management support networks, and subsidies have been granted for 17 projects to cover expenses for regional support institutions to jointly implement IP support measures for SMEs and other entities. In addition, meetings that include local governments are held for each block overseen by the IP offices of the Regional Bureaus of Economy, Trade and Industry, where information on IP-related policies and support cases is shared.

Moreover, the Japan Chamber of Commerce and Industry and the Tokyo Chamber of Commerce and Industry have published a collection of IP utilization case studies, "Turning Knowledge into 'Earning Power'—Behind the Scenes of 100 Companies—," compiling examples from 100 SMEs across Japan, and are disseminating a concrete picture of IP-driven management in an easy-to-understand manner[13]. In February 2026, a symposium was held to commemorate the publication of the case study collection, which brought the awareness that "IP utilization = earning power." Through the horizontal rollout of such best practices, further promotion of IP utilization by SMEs and mid-sized enterprises in regions is expected.

③ Enterprise Value Security Interest

The "Act on the Promotion of Cash Flow-Based Lending, etc." was enacted and came into force on May 25, 2026, with the aim of making it easier for businesses to obtain loans based on the actual state and future prospects of their businesses. The Enterprise Value Charge created under this Act is expected to facilitate lending that focuses on the overall value of a business, including intangible assets and future cash flows, without excessive reliance on real estate collateral or personal guarantees by business owners. In particular, it is expected to be utilized for raising growth capital for startups and companies that do not hold sufficient tangible assets such as real estate, as well as for supplying funds during business growth and revitalization phases.

Strong promotion of awareness and dissemination among stakeholders is required for the utilization of enterprise value security interests. In addition, with a view to promoting business-based lending including the use of Enterprise Value Charge, it is necessary to examine mechanisms for patent attorneys and other IP specialists to collaborate with financial institutions in conducting business assessments, the collection

[13] https://www.tokyo-cci.or.jp/seisaku/topics/chizai/backstage/

and publication of information useful for loan screening and follow-up at financial institutions, and burden reduction measures to lower the hurdles for business-based lending.

④ Working Group on Appropriate IP Transactions

In December 2024, the "Report of the Study Group on Corporate Transactions," compiled by the Study Group on Corporate Transactions, which examines the appropriate framework for regulations on abuse of superior bargaining position, raised important issues, including that if intellectual property rights and know-how held by contractors are not prevented from being absorbed at no cost or at low prices, disparities among businesses will become entrenched and innovation will become less likely to occur.

The government has also indicated its policy to conduct fact-finding surveys on IP infringement against SMEs, formulate guidelines under the Antimonopoly Act, and improve literacy through the IP Management Support Network, as set forth in the "Basic Policies for Economic and Fiscal Management and Reform 2025—Toward a Society Where People Can Feel 'Tomorrow Will Be Better Than Today'" (Basic Policies 2025) (Cabinet Decision of June 13, 2025), the "Grand Design and Action Plan for a New Form of Capitalism, 2025 Revised Version" (Cabinet Decision of the same date), and the "Intellectual Property Strategic Program 2025."

In this context, in July 2025, the Study Group on Corporate Transactions was reconvened to address the issues identified in the above government policies and the study group report, including the development of an environment for appropriate price pass-through throughout supply chains, the normalization of payment terms, further responses to issues related to commercial practices in logistics, and the appropriate handling of transactions involving intellectual property rights and know-how. Under the study group, the Japan Fair Trade Commission (JFTC), the SMEA, and the JPO established the Working Group on Appropriate IP Transactions to conduct specialized discussions focusing in particular on the appropriate framework for regulations on abuse of superior bargaining position with respect to the appropriate handling of transactions involving intellectual property rights and know-how.

Based on the discussions of the Working Group, the JFTC compiled the results of a survey conducted to understand the actual state of transactions involving intellectual property rights, etc., as the "Survey Report on Abuse of Superior Bargaining Position and Other Acts Concerning Intellectual Property Rights, Know-how, and Data," and the Working Group compiled the content of its discussions on the direction of guideline

formulation, etc., as the "Report of the Working Group on Appropriate IP Transactions," both of which were published in March 2026.

⑤ Protection of Regional Brands

In the European Union (EU), from December 2025, the scope of products protected by geographical indications (GIs) was expanded to include handicrafts and industrial products. In Japan, traditional crafts are protected under the "Act for the Promotion of Traditional Craft Industries" (Traditional Craft Industries Promotion Act) and the Trademark Act, among others. In light of the fact that handicrafts and other products have become subject to GI protection in the EU, it is necessary to monitor EU developments and examine whether such protection should be introduced in Japan.

From the perspective of strengthening the protection of regional brands, it is necessary to advance the organization of the relationship among GIs, trademarks, the traditional craft designation system, and other mechanisms, and to examine effective measures for protecting valuable regional products and services, from traditional to innovative ones.

<Agriculture, Forestry, Fisheries, and Food Industries>

Japan's agriculture, forestry, fisheries, and food industries have developed on the basis of a wide range of IP, including superior plant varieties, livestock genetic resources represented by Japanese beef (Wagyu), cultivation and breeding know-how, processing technologies, and food cultures rooted in various regions. These assets not only contribute to improving domestic productivity but also occupy a firm position as strengths of Japan's agriculture, forestry, fisheries, and food industries, including high evaluations in export markets and driving inbound demand.

Against this backdrop, the "Basic Plan for Food, Agriculture and Rural Areas" adopted by Cabinet Decision on April 11, 2025, set a target of increasing the export value of agricultural, forestry, fishery, and food products to 5 trillion yen by 2030, and efforts are being made by both the public and private sectors to expand exports, including the development of locally-based distribution channels, strengthening of supply capacity for exports, and coordination with overseas expansion of the food industry and expansion of food-related consumption through inbound tourism.

Furthermore, the "Ministry of Agriculture, Forestry and Fisheries Intellectual Property Strategy 2030," formulated in June 2025, aims to strengthen the "IP cycle" to address these challenges and to enhance the competitiveness of the agriculture, forestry, fisheries, and food industries and increase their "earnings."

In order to realize a virtuous cycle of IP that leads to monetization and reinvestment of IP related to the agriculture, forestry, fisheries, and food industries, and to achieve integrated brand protection, efforts will be made to develop an environment in which farmers and specialists can use variety registration, GIs, trademarks, patents, and other mechanisms in a cross-cutting manner, while also strengthening responses to counterfeit products that imitate Japanese regional brands overseas, and developing an environment for the export and overseas expansion of Japanese products.

Furthermore, it is necessary to go beyond protection and link IP to monetization and reinvestment to further promote the overseas expansion of agricultural, forestry, and fishery products, and to develop human resources and a hands-on support system in an integrated manner so that agriculture, forestry, fisheries, and food business operators can use IP as a "management tool." Specific measures include the development and dispatch of support personnel at regional bases and the expansion of practical education. In order to make these efforts effective, it is important for those working in the agriculture, forestry, fisheries, and food industries to be able to use multiple systems—such as breeders' rights, GIs, and patents—in a cross-cutting manner. With the cooperation and collaboration of industry associations, it is necessary to develop an IP information infrastructure to convert on-the-ground efforts into sustainable value, including the development of an environment in which system information can be centrally grasped and utilized, and the organization of standard support menus that are frequently used for IP surveys, rights acquisition, and contracts.

① Protection and Utilization of Breeders' Rights

In agricultural settings, the awareness of IP protection and utilization has not been sufficiently instilled, partly because the dissemination of developed varieties and cultivation technologies has been prioritized.

In light of this situation, in recent years, the Ministry of Agriculture, Forestry and Fisheries (MAFF) has been implementing seminars aimed at raising awareness among all stakeholders in the agriculture, forestry, fisheries, and food industries, developing specialized human resources with expertise in the agriculture, forestry, fisheries, and food industries (such as lawyers and patent attorneys), and promoting the horizontal rollout of best practices through the Minister of Agriculture, Forestry and Fisheries Award for Excellence in IP Protection and Utilization in the Agriculture, Forestry, Fisheries, and Food Industries, thereby promoting the protection and utilization of IP in the field.

On the other hand, new risks of variety outflow have become apparent, including the diversification of seed distribution channels due to the increase in online transactions since the COVID-19 pandemic, and the overseas outflow of new varieties for which variety registration applications are pending. In response to these issues, the MAFF convened the "Study Group on the Management and Utilization of Superior Varieties" and received an interim report in June 2025.

Based on this report, in July of the same year, the MAFF formulated the "Guidelines for the Protection and Utilization of Superior Varieties" and is promoting strict management of superior varieties in agricultural settings. In addition, a bill to amend the Seeds and Seedlings Act has been submitted to the 221st session of the National Diet to implement measures such as extending the duration of breeders' rights, establishing a system for requesting the suspension of exports of seeds and seedlings of varieties for which registration applications are pending, and restricting the storage of registered varieties for export purposes, and preparations are being made for the enactment and enforcement of the Act.

Furthermore, in order to prevent the unauthorized removal of breeders' rights-infringing products from Japan, strengthening cooperation with customs authorities is also indispensable. Since it may be difficult to determine from appearance alone whether seeds and seedlings infringe breeders' rights, it has been pointed out that variety identification using DNA testing and other methods is effective in enhancing the effectiveness of customs enforcement.

② Promotion of Strategic Overseas Licensing

Superior varieties are a source of strength for Japan's agriculture, and fruit tree varieties in particular are highly regarded overseas. By utilizing these superior varieties, it is possible to generate new "earnings" for Japan's agriculture and farmers through global expansion, including not only the export of harvested products but also strategic overseas licensing.

To this end, the MAFF will establish and operationalize a breeders' rights management organization this summer that will conduct domestic management of new varieties for which strict management is necessary for domestic dissemination and prevention of outflow, implement overseas licensing in a manner that does not compete with exports, deter unauthorized cultivation of superior varieties developed in Japan overseas, and channel licensing revenues back into variety development, for varieties for which licenses have been obtained from breeders' rights holders.

③ Acquisition of Breeders' Rights Overseas and International Cooperation

Since the acquisition of breeders' rights overseas is effective in terms of IP protection, the MAFF has been providing financial support for overseas applications through the Plant Variety and Seed Overseas Outflow Prevention Consortium since 2017 to promote overseas applications, and has supported a cumulative total of 1,293 overseas applications as of the end of September 2025 (of which 502 have been registered).

The "International Convention for the Protection of New Varieties of Plants" (hereinafter "UPOV Convention"), the international framework for the protection of breeders' rights, has 80 member countries and regions, and Japan is advancing examination cooperation with 19 countries and regions. However, since the benefits of the system have not been sufficiently communicated, many Southeast Asian countries, which are major export destinations, remain non-members, resulting in an insufficient environment for variety protection. Strengthening efforts to develop specialized human resources and variety protection systems in these countries toward the formation of international rules and strengthening of protection overseas has become a challenge.

In this regard, Japan has been encouraging the development of variety protection systems and accession to the UPOV Convention in countries where such systems are not yet in place, including Southeast Asian countries, through the East Asia Plant Variety Protection Forum established in 2007, and continued efforts toward the development of variety protection systems in other countries through this Forum and other means are expected.

④ Livestock Genetic Resources

Livestock genetic resources such as Wagyu are extremely important IP supporting Japan's livestock industry, and Wagyu beef in particular is highly regarded worldwide. However, the risk of unauthorized outflow of Wagyu genetic resources and use without contracts still exists. Through amendments to the Act on Improvement and Increase of Livestock and other measures, the institutional framework has been established, including bookkeeping requirements for the distribution of Wagyu genetic resources and strengthening of on-site inspection systems at livestock artificial insemination stations. In addition, the conclusion of transfer contracts by livestock genetic resource producers has become widespread, but there are significant regional differences in the maturity of contract conclusion and management systems among downstream stakeholders. Furthermore, while the use of trademarks and unified marks to protect the Wagyu brand is advancing, unless the genetic resources themselves are strictly managed, there remains a risk that low-quality "Wagyu-style" products produced overseas will circulate,

leading to damage to brand value.

⑤ Smart Agricultural Technologies, FoodTech, and Other New Technologies

With the advancement of digitalization, the scope of IP in the agricultural sector is rapidly expanding to include AI, robots, drones, IoT, and satellite data. While the sophistication of agricultural technologies is indispensable for maintaining production levels even amid a shortage of successors, digital-specific IP challenges have become apparent, including issues related to data ownership and handling, the protection of algorithms as rights, and safe operation on cloud platforms. The risk of information leakage associated with the spread of generative AI is also increasing, and a framework that simultaneously advances the introduction of technology and IP protection is required.

Furthermore, challenges are significant in the rapidly growing FoodTech sector. While new food technologies addressing various social challenges are attracting worldwide attention, domestic investment has not grown in proportion to the increase in global investment in advanced technologies such as FoodTech, making it difficult for new businesses to emerge. In order to create and develop FoodTech businesses originating in Japan, contribute to solving food and environmental problems in Japan and the world, create new industries that revitalize Japan, and contribute to the sustainable development of the food industry and regional revitalization, it is important to promote efforts by startups and collaboration among universities, research institutions, and companies in R&D in this field, and to establish a system in which IP related to developed technologies is appropriately protected and efficiently utilized.

⑥ Regional Brands

The reputation of Japanese products has been improving due to the expansion of exports, overseas expansion of the food industry, and growing inbound demand, but the risks of counterfeit products, false indication of origin, and variety outflow are also expanding accordingly. While the use of systems such as GIs and trademarks is increasing, many production areas face difficulties in independently building brand strategies.

In addition, the problem of genuine Japanese products not being appropriately evaluated due to the increase in "Japanese-style" overseas products has become apparent.

For this reason, efforts will be made to understand the actual state of sales of counterfeit products, etc., that free-ride on Japan's brand power in overseas markets, and

to respond accurately according to each country and region, thereby strengthening brand protection with a view to overseas expansion, including countermeasures against counterfeit products overseas.

In addition, strengthening the IP utilization system in production areas, accelerating countermeasures against counterfeit products, and protecting and utilizing brands that leverage regional resources have become urgent challenges.

⑦ Dissemination of the GI Protection System

The GI protection system protects the names of products that have quality, social reputation, and other characteristics nurtured over many years within the natural, human, and social factors and environment unique to a region, as regional IP. This makes visible the latent appeal and strengths of products linked to regions, such as quality, production methods, reputation, and stories, and is used as a tool to facilitate explanations and proof in transactions and to gain the trust of consumers.

In order to further support the improvement of income and regional vitality and the promotion of exports through the dissemination of the GI system, efforts are being made to reduce the burden on regions before and after registration applications, and to engage in strategic promotion to increase opportunities to encounter GI products in the market. In addition, the GI Support Desk, established as a support window to centrally receive consultations from production areas regarding registration applications, provides free advice from specialists.

Furthermore, since the GI protection system, together with the GI mark, can effectively appeal the appeal and stories of products to foreign visitors, there is a growing movement to utilize GIs as tourism content for the increasing number of inbound visitors.

In order to link these efforts to the enhancement of the added value of agricultural, forestry, and fishery products, regional revitalization, and the expansion of exports, it is necessary to build a coordination system among the MAFF, the Japan Tourism Agency, and other concerned government ministries and agencies, promote the horizontal rollout of best practices, and actively disseminate information to appeal to the attractiveness of GI products.

⑧ Public Research

Public research institutions are the source of many varieties and technologies, but since they have long prioritized "dissemination," the practice of IP management combining diverse means is still being strengthened. While facing the common

challenge of difficulty in accumulating experience due to personnel transfers, it is necessary to promote lateral collaboration and advance the sharing and accumulation of experience in order to enhance IP management.

< Regarding KPIs >

The "Intellectual Property Strategic Program 2025" set a KPI of "increasing the export value of agricultural, forestry, fishery, and food products from approximately 1.5 trillion yen in 2024 to 5 trillion yen by 2030." The export value of agricultural, forestry, fishery, and food products in 2025 was approximately 1.7 trillion yen, an increase of 12.8% compared to 2024.

(Direction of Measures)

<Small and Medium-sized Enterprises (SMEs) and Mid-sized Enterprises>

- The government as a whole will work to improve IP management literacy among SMEs and other entities.

  (Short term and mid term) (CAO (IP), Japan Fair Trade Commission, MAFF, JPO, Small and Medium Enterprise Agency)

- Based on the results of the fact-finding survey, the "Guidelines on Abuse of Superior Bargaining Position, etc., for Appropriate Transactions Involving Intellectual Property Rights, Know-how, and Data" (IP Transaction Guidelines) will be formulated at the earliest possible time, and after the formulation of the guidelines, awareness-raising and publicity activities and monitoring surveys of actual transaction conditions will be conducted.

  (Short term and mid term) (Japan Fair Trade Commission, Small and Medium Enterprise Agency , JPO)

- In light of the fact that there are cases where SMEs and small-scale business operators suffer IP infringement in their transactional relationships with large companies, etc., efforts will be made to build a system to strengthen the deterrence of infringement against SMEs and other entities.

  (Short term and mid term) (JPO)

- In order to enhance the "earning power" of SMEs and small-scale business operators by promoting their utilization of IP, the following measures will be promoted through the IP Management Support Network to efficiently support SMEs and other entities with management consultations, etc., from an IP perspective: nationwide rollout of best practices for supporting SMEs and other entities using IP information and strengthening of policy coordination;

strengthening of IP support for growth-oriented SMEs and other entities; coordination of IP support data and verification of policy effectiveness; and strengthening of the development of IP management support human resources.

(Short term and mid term) (JPO, Small and Medium Enterprise Agency)

- In order to strengthen and enhance IP management support and enhance the earning power of regions, efforts will be implemented toward the creation of regions that aim to promote sustainable IP utilization (IP Management Support Model Areas) through strengthening the collaboration of regional support networks and promoting innovation creation by regional companies.

(Short term and mid term) (JPO)

- In order to ensure that IP, which is an important management resource for linking innovative products and services to regional value creation, is also utilized by regional companies, efforts will be made to expand INPIT's functions to local areas, among other measures.

(Short term and mid term) (JPO)

- Support will be provided to help SMEs sustainably grow based on IP-driven management strategies and enhance their own corporate value, and to ensure that the enhanced corporate value is appropriately evaluated by financial institutions, by visualizing management strategy stories that link their own IP and intangible assets as strengths with their future vision, and by supporting business assessments by investors and financial institutions that focus on IP and intangible assets.

(Short term and mid term) (JPO)

- Efforts will be made toward building an ecosystem for the dissemination and practice of value design management, including further expanding the use of the Business Design Sheet among startups, SMEs, and other entities.

(Short term and mid term) (CAO (IP))

- Support will be provided for the consideration of long-term visions through the creation of Business Design Sheets at comprehensive business support centers (Yorozu Support Centers), and their utilization will be promoted in responding to management consultations.

(Short term and mid term) (Small and Medium Enterprise Agency, CAO (IP))

- Through the Partnership Building Declaration and other measures, compliance with the promotion standards based on the Act for the Promotion of Subcontracting SMEs will be thoroughly enforced to demand the appropriate handling of IP transactions, and the dissemination and utilization of model contract forms will be promoted. In addition, IP Investigators, who specialize in investigating IP-related

transaction issues, will be used to understand the actual state of IP-related subcontracting transactions by SMEs, and the "IP Transaction Advisory Board" will be convened as necessary to obtain advice on future responses.

(Short term and mid term) (Small and Medium Enterprise Agency, CAO (IP))

- In order to support high-quality initiatives in line with the purpose of the new financing option (Enterprise Value Charge) that focuses on the overall value of a business, including intangible assets such as corporate know-how and customer bases, continued efforts will be made to raise awareness and disseminate information among stakeholders including businesses and financial institutions. Furthermore, with a view to promoting business-based lending including the use of enterprise value security interests, examinations will be conducted on mechanisms for patent attorneys and other IP specialists to collaborate with financial institutions in conducting business assessments, the collection and publication of information useful for loan screening and follow-up at financial institutions, and burden reduction measures to lower the hurdles for business-based lending.

(Short term and mid term) (Financial Services Agency, CAO (IP), METI, Small and Medium Enterprise Agency , JPO)

- In light of the fact that handicrafts and other products have become subject to GI protection in the EU, EU developments will continue to be monitored, and the feasibility of introducing such protection in Japan will be examined.

(Short term and mid term) (METI, MOFA)

- In addition to the fact that examination of applications to which the consent system and other measures introduced by the amended Trademark Act that came into force in April 2024 are applied has entered full swing, increasing the burden of trademark examination, and given that the number of applications has been on an increasing trend, efforts will be made to improve the efficiency of trademark application examination processing and enhance the examination system—including by promoting applications that do not attract reasons for refusal and utilizing the trademark refusal reason cross-sectional survey project—so that the "examination period until rights are granted" and the "period until the first examination notice" can be set at an average of 7 to 9 months and an average of 5.5 to 7.5 months, respectively, in FY2026. In addition, awareness-raising on the importance and utilization methods of trademarks will be strengthened to promote the dissemination and penetration of the trademark system.

(Short term and mid term) (JPO) [Repeated]

<Agriculture, Forestry, Fisheries, and Food Industries>

- With a view to strengthening IP management capabilities throughout the agriculture, forestry, fisheries, and food industries, efforts will be made to raise awareness throughout the agriculture, forestry, fisheries, and food industries through the implementation of seminars and support for the development of programs for seed companies, while also developing and securing specialized IP human resources (such as lawyers and patent attorneys) capable of providing advice suited to the agriculture, forestry, fisheries, and food industries, as well as core human resources who lead the field.

  (Short term and mid term) (MAFF) [Repeated]

- The Minister of Agriculture, Forestry and Fisheries Award, which commends business operators, etc., that have achieved outstanding results in the development of their business management through the protection and utilization of IP in the agriculture, forestry, fisheries, and food fields, will continue to be implemented, and the discovery and horizontal rollout of excellent and advanced models for the strategic protection and utilization of IP will be promoted to revitalize IP activities that contribute to management in the agriculture, forestry, fisheries, and food industries.

  (Mid term) (MAFF)

- For higher education institutions considering the introduction of IP learning in the agriculture, forestry, fisheries, and food fields as part of their educational curricula or special lectures, outreach lectures, provision of IP education materials, and promotion of introduction into educational programs will be provided to promote the development of human resources with IP management capabilities related to the agriculture, forestry, fisheries, and food industries.

  (Short term and mid term) (MAFF)

- In order to advance the practice of IP protection and utilization in the agriculture, forestry, fisheries, and food industries, the "Agricultural IP Comprehensive Support Desk," which matches field practitioners with specialized human resources and provides advice, will provide advice, etc., on IP protection and utilization in response to consultations received.

  (Short term and mid term) (MAFF)

- In order to strengthen the protection of breeders' rights, a bill to amend the Seeds and Seedlings Act to implement measures such as extending the duration of breeders' rights and establishing the right to request the suspension of exports of applied varieties has been submitted to the extraordinary session of the Diet in

FY2026, and preparations are being made for the enactment and enforcement of the Act. In addition, in order to prevent the outflow of superior varieties overseas while generating earnings from overseas, overseas variety registration and countermeasures against breeders' rights infringement will be promoted, and the protection and utilization of IP will be pursued through strategic overseas licensing and strict domestic management by the breeders' rights management organization. Furthermore, with an eye toward overseas markets, the development of new varieties will be promoted.

(Short term and mid term) (MAFF)

- With a view to protecting and utilizing Japan's plant new varieties overseas, efforts will be made to harmonize examination standards internationally so that characteristic examination data related to Japan's variety registration can be utilized overseas and Japan's varieties can be registered appropriately and promptly. In particular, in order to contribute to the early protection of fruit tree and other varieties, the Seed and Variety Improvement Center of the National Agriculture and Food Research Organization will sequentially develop a system for conducting characteristic examinations in accordance with international standards for fruit trees and other varieties. In addition, in order to improve the efficiency of variety registration examination, the international status of technological development related to the utilization of genetic information, etc., which is advancing overseas, will be surveyed.

(Short term and mid term) (MAFF)

In order to appropriately protect Japan's varieties overseas, through the activities of the East Asia Plant Variety Protection Forum established on Japan's initiative and other means, the development of variety protection systems and accession to the UPOV Convention will be encouraged in countries where variety protection systems are not sufficiently developed, including East Asian countries, and examination cooperation, etc., will be pursued.

In addition, while cooperating with UPOV, the utilization of the UPOV Alliance's common electronic application examination system (UPOV e-PVP) will be promoted, and efforts to strengthen UPOV membership promotion activities will be made through surveys and analyses of best practices utilizing plant new varieties, etc.

(Short term and mid term) (MAFF)

- Based on the "Act on Improvement and Increase of Livestock" and the "Act on Prevention of Unfair Competition Related to Livestock Genetic Resources," the following efforts will be promoted to protect the value of livestock genetic

resources as IP and to further improve the proper management of their distribution.

- Since the dissemination of model contract forms for contracts to be concluded when transferring Wagyu genetic resources has become established among livestock genetic resource producers, continued efforts will be made to disseminate them among downstream stakeholders, thereby preventing unfair competition and promoting the protection of their value as IP.
- On-site inspections of livestock artificial insemination stations, etc., across the country will continue to be implemented, and compliance with laws and regulations will be thoroughly enforced through the holding of training sessions for livestock artificial insemination technicians, etc., thereby promoting the proper management of distribution.
- The reduction of administrative burdens on prefectures associated with reports from livestock artificial insemination stations, etc., the operation and functional enhancement of the national system for information aggregation, and the promotion of digitalization will be pursued.

(Short term and mid term) (MAFF)

- In order to enable safe data linkage for agricultural machinery, etc., beyond the boundaries of manufacturers and systems, the "Guidelines for the Development of Open APIs in the Agricultural Sector" were formulated in FY2020, and open APIs for acquiring location information, working hours, and other data for agricultural machinery such as tractors and combine harvesters were developed. From FY2026 onwards, the sharing and utilization of agriculture-related data will be promoted through the development of open APIs for equipment such as water management systems for which APIs have not yet been developed, and through the development of new services utilizing the open APIs developed to date.

(Short term and mid term) (MAFF)

- With regard to advanced food technologies such as FoodTech, while continuing to give due consideration to the importance of the perspective of IP protection and utilization, open innovation will be promoted by developing venues for open innovation, and the creation of new products and added value utilizing FoodTech will be promoted.

(Short term and mid term) (MAFF)

- In order to further contribute to improving the income and regional vitality of agriculture, forestry, and fisheries stakeholders and to promoting exports, model initiatives for protecting and utilizing brands through GIs, trademarks, and other means will be promoted, and the registration of diverse products, including those

for export, will be promoted.

In addition, while advancing collaboration with other industries such as the food industry and tourism, efforts will be made to raise awareness of Japan's GI protection system and GI products both domestically and internationally, and to expand food-related consumption through inbound tourism.

(Short term and mid term) (MAFF)

- In order to prevent the distribution of counterfeit products, etc., of branded Japanese agricultural, forestry, fishery, and food products overseas, countermeasures against infringement through unauthorized use will be promoted through the promotion of mutual protection of GIs with foreign countries, surveys of overseas local markets and e-commerce sites, and the operation of a consultation desk for suspected counterfeit products of agricultural, forestry, fishery, and food products.

(Short term and mid term) (MAFF, MOFA, JPO) [Repeated]

- Countermeasures against counterfeit products will be promoted through the acquisition of IP rights (GIs, trademarks) overseas necessary for the protection of and response to infringement of IP rights overseas, and through responses to bad-faith applications overseas.

(Short term and mid term) (MAFF)

- In order to ensure that the results of agriculture, forestry, and fisheries research are effectively implemented in society, IP management at public research institutions, etc., will be strengthened. Specifically, in order to expand IP management strengthening support efforts from individual cases to a broader scale, network activities by IP departments of public research institutions, etc., will be supported, and methods for addressing common challenges will be shared, consultations by IP specialists will be provided, and seminars useful for practical work will be held, thereby promoting the horizontal rollout of practical initiatives.

(Short term and mid term) (MAFF)

3. "Utilization" of Intellectual Property

（1） Promoting Social Implementation through Industry-Academia Collaboration

(Current Status and Challenges)

Universities bear a social mission to contribute to resolving social challenges and creating new value in addition to education and research, and intellectual property plays a foundational role in realizing this mission. Specifically, research outcomes created at

universities are appropriately created and protected as intellectual property, and through the commercialization of such outcomes via the creation of startups and collaboration with companies, they are linked to social implementation, with the expectation that the resulting revenues will be reinvested into subsequent research and educational activities, forming a virtuous cycle—demonstrating the significant role that intellectual property plays.

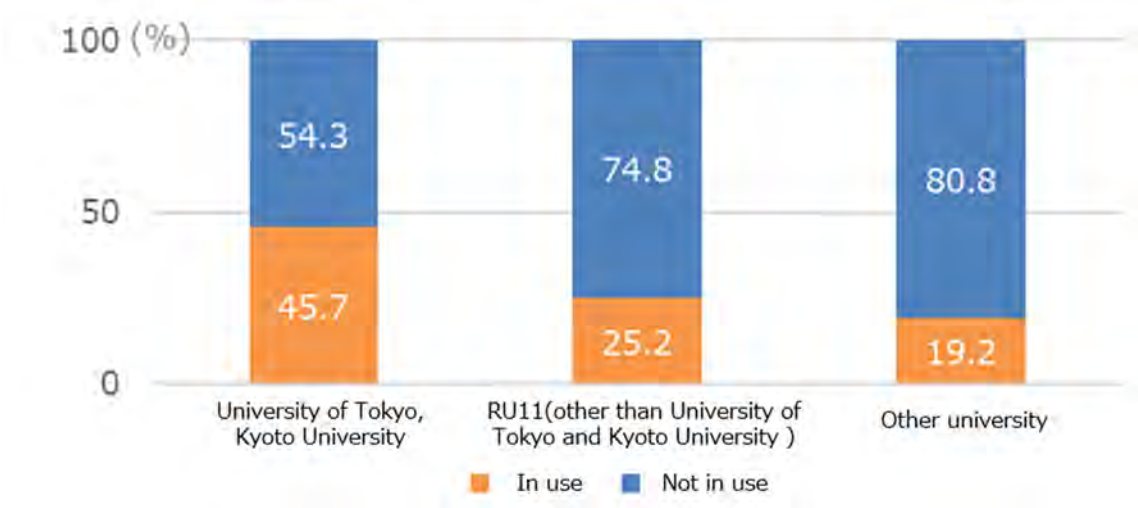
In recent years, as the closer of science and business has rapidly advanced and a structure in which research and development aimed at commercialization and social implementation proceeds simultaneously from the basic research stage has become mainstream, the rapid commercialization and social implementation of research outcomes has come to influence Japan's international competitiveness and national security. On the other hand, there are concerns about a decline in the competitiveness of Japanese universities, which should serve as the source of innovation, as evidenced by the relative decline in the number of Top 10% papers[14] and the stagnation in the number of doctoral degree recipients. In light of these challenges, the "Study Group on University Management for Competing and Growing in the World" (September 2025) was established to enable universities to regain world-class research and educational capabilities, deepen collaboration with industry and local communities, maximize the value of knowledge, and achieve autonomous growth. The study group is broadly examining governance reform in university management, strengthening of financial foundations, and other matters, and is expected to serve as an opportunity for university reform.

Against this backdrop, "Advancement of the Innovation Ecosystem Connecting Industry, Academia, and Government" has been set as an important pillar of the 7th Science, Technology and Innovation Basic Plan, and efforts are being made to strengthen the research capabilities of research university groups through the Universities for International Research Excellence System and the Program for Forming Japan’s Peak Research Universities (J-PEAKS), as well as to reform national research and development agencies, increasing the importance of the innovation ecosystem centered on universities and national research and development agencies.

With regard to KPIs for industry-academia collaboration, the further dissemination of the "University Intellectual Property Governance Guidelines" and other measures are intended to support the maximization of social implementation opportunities for intellectual property and the realization of a virtuous cycle of funds. Looking at the related indicator of the utilization status of patents held by universities and other

[14] Number of papers in the top 10% by citation count in each field for each year

institutions (Figure 34), it can be seen that approximately 80% of patents held by many universities and other institutions are unused, indicating that there is room to expand social implementation opportunities. Behind this situation, it is considered that there are various factors, including insufficient intellectual property management with an eye toward commercialization at universities and other institutions, insufficient creation and protection of intellectual property with an eye toward commercialization, and insufficient systems and budgets for maximizing social implementation opportunities for research outcomes, and responses that take these factors into account are required.



(Source) Prepared by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters based on the "Status of Industry-Academia Collaboration at Universities and Other Institutions in FY2024" by MEXT

Figure 34: Utilization Status of Patents Held by Universities and Other Institutions

<University Intellectual Property Governance Guidelines>

The government formulated the "University Intellectual Property Governance Guidelines" (CAO, MEXT, METI) in March 2023, with the aim of maximizing social implementation opportunities for intellectual property created by universities and realizing a virtuous cycle of funds. Since the formulation, the government has continuously carried out dissemination activities for the guidelines and has been grasping the actual situation through exchanges of opinions with diverse stakeholders, including universities, companies, and related organizations.

In 2025 as well, exchanges of opinions were conducted with more than 30 universities, approximately 10 companies, and related organizations. As a result, problematic cases were confirmed in which inflexible contract negotiations contrary to the perspective of maximizing social implementation of intellectual property and

realizing a virtuous cycle of funds through the university intellectual property innovation ecosystem envisioned by the guidelines led to prolonged negotiations and ultimately resulted in the abandonment of social implementation. On the other hand, many cases were also observed in which smooth consensus was reached by setting minimum thresholds for contract terms and then responding flexibly in light of the characteristics of individual cases, confirming that the intent of the guidelines is gradually permeating and producing a certain degree of effect.

In addition, while the number of licenses granted for university intellectual property and intellectual property revenues are on an increasing trend, there are indications that small and medium-sized universities in particular, despite having excellent research outcomes, are unable to adequately file for and obtain intellectual property rights domestically and internationally or conduct marketing activities due to a shortage of intellectual property expenses and specialized human resources including those for marketing. There are also indications that the intent of the guidelines has not sufficiently permeated to university management, who make the final decisions on securing intellectual property expenses and human resources.

Furthermore, there are also voices indicating that with regard to the attribution of intellectual property rights created as a result of joint research, rather than "as a matter of course" making it jointly owned by the university and the commercializing entity that is the joint research partner, it is important to decide whether the rights should be attributed solely to the university, jointly to the university and the joint research partner, or solely to the joint research partner, with an eye toward the utilization of university intellectual property.

In addition, there are indications that in order to reliably protect research outcomes as intellectual property and connect them to social implementation, it is necessary to establish intellectual property management processes including confirmation of whether patent applications are required before publication of papers, and to expand support systems. Furthermore, there are also indications that the intellectual property activities currently handled individually by each university should be consolidated at large-scale universities and other institutions to strengthen a system that can cover a wider area, and examination of this is expected.

In light of the above situation, it is required to continue to conduct dissemination activities and exchanges of opinions[15] going forward to promote the practice of the principles in the guidelines, and to advance the examination of necessary

[15] For example, a research report on the handling of patent rights resulting from joint research through industry-academia-government collaboration (Japan Patent Office, 2026) conducted a survey including a domestic questionnaire targeting 1,247 companies, 107 universities, 21 TLOs, and 30 public research institutions.

countermeasures through the identification and analysis of challenges.

<Guidelines for Handling of Intellectual Property upon Transfer or Retirement of Researchers at Universities and Other Institutions>

As the domestic and international mobility of researchers at universities and other institutions is increasing, including through the Japan Research & Innovation for Scientific Excellence (J-RISE) Initiative compiled in June 2025 for the strategic invitation of excellent overseas researchers, it is necessary to appropriately organize the handling of intellectual property of researchers when they transfer to other universities in order to fully utilize intellectual property as excellent research outcomes of universities and achieve the maximization of social implementation opportunities.

The Cabinet Office formulated the "Guidelines for Handling of Intellectual Property upon Transfer or Retirement of Researchers at Universities and Other Institutions" in March 2025, with the aim of further promoting the social implementation of intellectual property created by researchers at universities and national research and development agencies, which are the drivers of innovation, and in June 2025 published "Points to Note Regarding the Handling of Intellectual Property upon Transfer or Retirement of Researchers between Japan and the United States."

Since the formulation of the guidelines, trial use and consideration of introduction are progressing at universities and other institutions. Through the use of the guidelines, it has been confirmed that they are effective in building common understanding among relevant parties and in facilitating flexible negotiations through multiple response options such as conditional assignment, thereby leading to relatively smooth consensus on the handling of intellectual property. On the other hand, there are also indications that for universities and staff with insufficient practical experience, it is not necessarily easy to make comprehensive judgments while taking into account the points to note set forth in the guidelines.

In light of this situation, in order to further enhance the effectiveness of the guidelines and support judgment and practical responses at universities and other institutions, a case study collection has been published that organizes identified challenges and examples of initiatives that provide hints for resolving them. Going forward, it is required to facilitate practical procedures related to the handling of intellectual property upon transfer or retirement of researchers through dissemination and promotion activities for the guidelines and case study collection.

<Support for Universities and Other Institutions by Intellectual Property

Specialists through INPIT>

INPIT is implementing a project to dispatch intellectual property management specialists to universities and other institutions as the Intellectual Property Acceleration program for Academic R&D Project (iAca), in order to promote the rapid social implementation of research outcomes at universities and other institutions. This project covers support from the discovery of seeds and formulation of exit strategies at the early stages of the research phase to support for industry-academia collaboration activities aimed at commercializing excellent seeds including the creation of startups, providing seamless support.

In FY2025, in order to provide more systematic support from seed discovery to commercialization, three schemes were established: support for discovery and utilization of promising seeds (Scheme ①), support for startup creation (Scheme ②), and support for large-scale joint research with companies (Scheme ③), and specialists were dispatched to 40 universities and other institutions selected (Scheme ①: 18 institutions, Scheme ②: 18 institutions, Scheme ③: 4 institutions). Continued responses are required to ensure that research outcomes at universities and other institutions are smoothly implemented in society.

In addition, INPIT provides support through intellectual property strategy experts as other support for universities, startups, and others. As support related to joint research contracts, advice is provided on points to note regarding negotiations and contracts between parties, such as the introduction of template contracts and the concept of consideration and compensation in cases of implementation and non-implementation, and it is hoped that efforts toward the realization of social implementation will continue.

<Intellectual Property Business Matching Utilizing Generative AI>

In recent years, efforts to utilize generative AI for business matching have been advancing from the perspective of accelerating the social implementation of intellectual property held by universities and companies. In particular, with regard to patent technologies and research outcomes that remain unused, while visualization has progressed through open patent information databases and other means, it has been pointed out that it is not easy for staff to search for and understand technology seeds on their own due to the specialized nature of the technical content, making it difficult to appropriately match them with needs.

From FY2025, the Kinki Bureau of Economy, Trade and Industry has been working to enhance intellectual property business matching targeting "open patents" for which there is an intention to license to third parties, by utilizing generative AI to search for

and present technology seeds that meet the needs of small and medium-sized enterprises and others. Specifically, by utilizing a function that uses natural language search with generative AI to propose technology seeds that meet the conditions in plain language, an environment is being developed in which support organizations and small and medium-sized enterprises can access technology seeds without relying on specialized knowledge. It is expected that the way small and medium-sized enterprises develop new products will change significantly, and that further success stories will be created.

<Regarding KPIs>

The KPI of "Supporting the maximization of social implementation opportunities for intellectual property through the dissemination of the University Intellectual Property Governance Guidelines and other measures (grasping of social implementation cases and their status)" was set in the "Intellectual Property Strategic Program 2025." Regarding the related indicator of the utilization status of patents held by universities, as the FY2024 results, the proportion of patents in use was 45.7% for the University of Tokyo and Kyoto University, 25.2% for RU11[16] (excluding the University of Tokyo and Kyoto University), and 19.2% for other universities.

(Direction of Measures)

- Exchanges of opinions regarding the "University Intellectual Property Governance Guidelines" will be conducted, and the status of implementation of intellectual property management and other matters based on the "University Intellectual Property Governance Guidelines," as well as challenges and countermeasures, will continue to be analyzed and organized with reference to the opinions gathered, and necessary countermeasures will be examined. In addition, collection of good practices and other examples toward their implementation will be advanced, and the results will be made public.

  (Short term and mid term) (CAO (IP), MEXT)

- The "Guidelines for Handling of Intellectual Property upon Transfer or Retirement of Researchers at Universities and Other Institutions" will be disseminated, and challenges arising from the use of the guidelines at universities and other institutions will be analyzed and organized, and responses will be examined.

  (Short term and mid term) (CAO (IP))

[16] Academic Research Consortium, consisting of 11 universities: Hokkaido University, Tohoku University, University of Tsukuba, The University of Tokyo, Waseda University, Keio University, Institute of Science Tokyo, Nagoya University, Kyoto University, Osaka University, and Kyushu University.

- With a view to maximizing social implementation opportunities for university intellectual property and realizing a virtuous cycle of funds, based on the results of surveys on the actual situation of intellectual property utilization in industry-academia collaboration activities at domestic and overseas universities (technology transfer such as intellectual property licensing, intellectual property contracts in joint research) and collection and analysis of best practices, in FY2026, information will be provided to universities on examples of efforts to resolve challenges toward social implementation, such as measures to address shortages of technology transfer personnel or know-how, through seminars, events, and other means. In addition, awareness-raising will continue through pamphlets and other means to raise the interest of university researchers in patents.

  (Short term and mid term) (JPO)

- In order to support the formulation of international intellectual property strategies by small and medium-sized enterprises, startups, and universities and other institutions, subsidies will be provided for foreign filing costs, examination request costs, and intermediate procedure costs such as responses to notices of reasons for refusal, to promote the acquisition of rights overseas, and subsidies will also be provided for costs of countermeasures against intellectual property infringement overseas, leading to the acquisition, commercialization, and enforcement of intellectual property rights globally. In addition, with the Japan Patent Office serving as a hub, collaboration between INPIT and JETRO will be enhanced to support the resolution of intellectual property-related challenges faced by small and medium-sized enterprises in expanding overseas.

  (Short term and mid term) (JPO)

- Efforts will be made to disseminate and establish the "OI Model Contract (University Edition)," which aims to maximize the sum of social value through a virtuous cycle of social implementation of "knowledge" and creation of new "knowledge" through sustainable collaboration between universities and business companies and startups, while examining necessary revisions. In addition, awareness-raising and dissemination of the "Guidelines on Business Collaboration with Startups and Investment in Startups" will continue to be implemented through notification to individual startups and others.

  (Short term and mid term) (Japan Fair Trade Commission JPO)

- iAca will be implemented, and "Intellectual Property Strategy Producers," who are specialists in intellectual property management, will be dispatched to universities and other institutions. This project will realize seamless support from

the discovery of seeds and formulation of exit strategies at the early stages of the research phase to support for industry-academia collaboration activities aimed at commercializing excellent seeds including the creation of startups.

(Short term and mid term) (JPO)

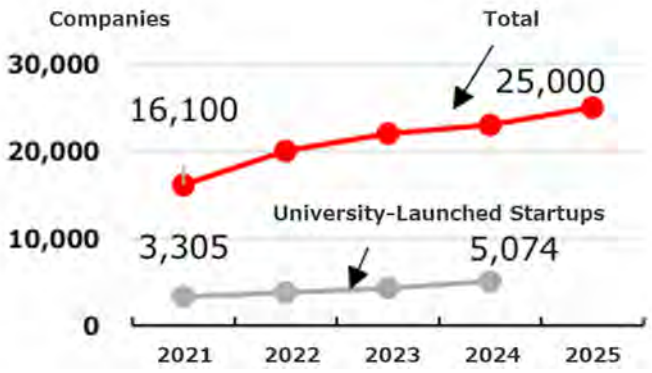
- In order to expand the number of registered open patents and promote their active utilization by users, efforts will be made to strengthen awareness-raising activities, and hearings will be conducted with universities and companies that are licensors and licensees, as well as local governments and others that provide matching support in various regions, to create matching opportunities. At the same time, in conjunction with the renewal of the open patent information database, the functions and convenience of the database will be widely publicized to aim for further expansion of use. Consideration will also be advanced regarding methods for providing open patent information in an easy-to-understand manner utilizing AI. Furthermore, through matching projects and other means that utilize information on patents with an intention to open, support will be provided for commercialization through licensing of patents with an intention to open.

(Short term and mid term) (JPO)

(2) Support for Startups

(Current Status and Challenges)

The government formulated the "Startup Development Five-year Plan" in 2022, positioning startups as the drivers of realizing a sustainable economic society by converting social challenges into engines of growth, and has comprehensively deployed measures with three pillars: ① building human resources and networks, ② strengthening fund supply and diversifying exit strategies, and ③ promoting open innovation. Through these efforts, the number of startups has steadily increased, and the base of the startup ecosystem has expanded (Figure 35). In addition, the government compiled the "Comprehensive Startup Creation and Scale-up Package" on May 20, 2026, consisting of three pillars—① scaling up of startups, ② support for deep tech startups, and ③ creation and development of startups that will support regional economies and societies—to fundamentally strengthen the above five-year plan, and further strengthening of the startup ecosystem is expected.



(Source) Cabinet Secretariat, Japan Growth Strategy Headquarters, Materials from the 1st Startup Policy Promotion Subcommittee

Figure 35: Number of Startups in Japan

For startups, intellectual property is a core management resource for securing technological superiority and attracting investment and business partnerships. In particular, for deep tech fields and university-launched startups, the protection of rights such as patents based on research outcomes has a significant impact on commercialization and international expansion. On the other hand, startups face the challenge of finding it difficult to adequately formulate intellectual property strategies, acquire and manage rights, and build governance structures due to human and financial constraints.

In addition, for Japan's growth, not only university-launched startups but also the creation of corporate-launched startups is indispensable, and there are voices indicating that the economic impact of creating corporate-launched startups that utilize technologies and ideas accumulated within companies but not yet commercialized or put into practical use as existing businesses is significant, and grasping the actual situation and examining necessary countermeasures as needed are required.

Furthermore, as the public sector is also an important arena for the activities and development of startups with innovative technologies, efforts are also being made to expand public procurement from startups and to achieve a contract ratio of 3% or more. Public procurement is an important means of supporting the formation of initial track records and social implementation, but under conventional procurement practices, there were indications that there was a risk of hindering the business continuity and growth of startups due to issues surrounding the attribution of intellectual property and responses to information disclosure. In light of these challenges, the "Guidelines on the Protection of Intellectual Property and Procurement Practices for Public Procurement from Startups and Others" were formulated in June 2025, organizing the basic concept of

appropriate handling of intellectual property, the selection of contract methods and template contracts according to objectives, the utilization of specialists, and other matters. Going forward, it is important to make public procurement an attractive market for startups through the dissemination and utilization of these guidelines, and to achieve both the maintenance and improvement of public infrastructure services through public-private collaboration and the growth of startups.

In addition, in national public procurement including dual-use technologies, it is important to view costs related to the acquisition, management, contracting, and utilization of intellectual property as strategic investments to secure future competitiveness and supply stability. For this reason, it is necessary to examine mechanisms to ensure that intellectual property costs are appropriately reflected in contract amounts in public procurement.

<Intellectual Property Acceleration Program for Startups (IPAS)>

In IPAS, INPIT dispatches mentoring teams composed of business experts and intellectual property experts to early-stage startups, providing support related to the construction of business models and the formulation of intellectual property strategies in accordance with business models. In FY2025, 22 early-stage startups were supported, and a forum (DemoDay) was held to disseminate the results of support, providing opportunities for information dissemination on support results and self-promotion, as well as opportunities to meet with startup support stakeholders such as venture capital firms. Going forward, support will continue to strengthen the startup ecosystem from the intellectual property perspective.

<Regarding KPIs>

The KPI of "Promoting startup development through intellectual property support measures for startups (grasping of status including startup support satisfaction and cases)" was set in the "Intellectual Property Strategic Program 2025." In IPAS, which the Japan Patent Office launched in FY2018, there have been a cumulative total of 655 applications over eight years, of which 144 startups have been supported (as of March 2026).

In FY2024, 18 companies were supported, and in FY2025, support was further expanded to 22 companies. In a satisfaction survey of the 22 startups that received support in FY2025, 19 companies responded "very satisfied" and 3 companies responded "satisfied," with all companies that received support expressing satisfaction.

(Direction of Measures)

- Support will be provided to startups for building intellectual property strategies linked to business models that realize competitive advantage, by dispatching teams of intellectual property strategy producers composed of business experts and intellectual property experts to early-stage startups, and by dispatching intellectual property experts to startup support organizations such as venture capital firms. In addition, 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.

  (Short term and mid term) (JPO)

- Ecosystem activation will be promoted through effective information dissemination such as video distribution on intellectual property portal sites for startups, and through the provision of venues that connect startup ecosystem stakeholders and intellectual property stakeholders across the country.

  (Short term and mid term) (JPO)

（3） Promotion of the New International Standards Strategy

(Current Status and Challenges)

Based on the "New International Standards Strategy" (decided by the Intellectual Property Strategy Headquarters on June 3, 2025), the results of the FY2025 follow-up on cross-cutting initiatives by concerned government ministries and agencies related to international standardization, particularly efforts in the strategic domains (Environment/Energy, Food/Agriculture, Forestry and Fisheries, Disaster Prevention, Digital/AI, Mobility, Information and Communications, Quantum, and Bioeconomy) and important domains (Nursing Care/Welfare, Infrastructure, Fusion, Space, Semiconductors, Materials, Resources, Ocean, and Medical/Healthcare) defined under the Strategy, are presented in the attached document.

<Regarding KPIs>

The "Intellectual Property Strategic Program 2025" stipulates that KPIs shall be established for each specific measure to drive progress. In the "New International Standards Strategy," KPIs are set for each individual measure listed in the annex table of the Strategy (e.g., the number of government strategies and plans that incorporate descriptions of international standardization activities in light of the Strategy; the number of national research and development agencies that have introduced evaluation

systems for standardization activities for their staff, etc.). In the annex to the Program, progress for the current fiscal year is assessed against each of these KPIs.

Furthermore, for the 17 important and strategic domains identified in the "New International Standards Strategy," appropriate KPIs are to be established in accordance with the circumstances of each domain.

At the same time, since these KPIs are insufficient to capture Japan's overall international standardization activities, the following will henceforth be established as primary KPIs: "① Number of secretariats held by Japan in the International Organization for Standardization (ISO)/International Electrotechnical Commission (IEC) (to maintain a ranking within the top five by FY2030)" and "② Number of international standards/rules proposed and led by Japan, and the number adopted as international standards/rules, in the strategic/important domains and the 17 strategic fields[17]."

<Specific Initiatives by Ministries and Agencies>

The assessment and challenges based on the FY2025 follow-up results[18] (attached document) on major international standardization activities by ministries and agencies are as follows.

① Strengthening Efforts by Industry, Academia, Government, and Finance (Raising awareness and driving behavioral change in the business community, academia, the financial sector, and government; leveraging standards in public procurement and R&D funding, etc.)

- Ministries and agencies are advancing collaboration and networking with the business community and academia.
- On the other hand, outreach to senior management and academia remains fragmented, and further efforts are needed to broadly raise awareness of the importance of international standardization activities and to embed them in management strategies and similar frameworks.

② Strengthening the Standards Ecosystem (Human resource development; fostering and strengthening specialized institutions (professional services) and their

[17] It is essential to strategically lead the formation of international standards and rules advantageous to Japan, taking into account Japan's strengths and other relevant factors, and it should be noted that evaluation should not be based solely on the number of proposals submitted or standards established.

[18] At the end of FY2025, the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters surveyed concerned government ministries and agencies regarding the status of initiatives (including planned ones) through the end of FY2025, and compiled the reported results.

utilization, etc.)

- Ministries and agencies are making progress in examining training programs and skill sets for human resource development, as well as exploring the use of professional services.
- On the other hand, human resource development remains confined to individual ministries/agencies and sectors, and has yet to extend to the broader industrial and academic communities. Regarding professional services, it remains necessary to continue implementing the development of such services and promoting their adoption by industry.

③ Clarifying Standards Strategies and Governance (Public-private collaboration, information sharing, inter-ministerial coordination, etc.)

- An all-Japan public-private collaboration framework has been established, and the development of public-private collaboration frameworks in individual sectors is progressing.
- On the other hand, sharing of knowledge such as human resources and know-how between the public and private sectors and across ministries and agencies remains an ongoing challenge. Going forward, it will be necessary to further advance the sharing of knowledge and collaboration in terms of human resources and know-how between the public and private sectors and across ministries and agencies. It is also necessary to further expand the domains and sectors in which public-private collaboration frameworks for international standardization have been established.

④ Strengthening International Collaboration (Strengthening international networking; promoting mutual recognition; strengthening collaboration with other countries, etc.)

- Ministries and agencies continue to maintain their presence in de jure international standardization bodies, while actively participating in international conferences, strengthening collaboration with other countries, and making progress in securing key positions for Japanese nationals and hosting conferences in Japan.
- On the other hand, the use of international mutual recognition systems and efforts toward regulatory harmonization remain limited to certain domains and sectors.

<Domain-Specific Initiatives>

Based on the results of monitoring domestic and international policy and international standardization trends in FY2025, as well as the follow-up results[19] on major international standardization activities by ministries and agencies in each domain, the overall assessment is that Japan-led international standardization efforts are advancing within domains such as Environment/Energy (climate change, energy, and GX; nature-positive approaches; and circular economy), Disaster Prevention, and Quantum, while active international standardization efforts—including regulatory measures—by Europe and China in the Digital/AI and Environment/Energy domains continue. Accordingly, Japan faces the ongoing challenge of proactively responding to international policy and standardization trends in light of Japan's growth strategy and science and technology strategy.

The status of domain-specific initiatives is as set out in the attached document.

<Other Domains and Cross-Domain Matters>

In the field of international standardization bodies, the International Accreditation Forum (IAF) and the International Laboratory Accreditation Cooperation (ILAC) have merged to form a new organization, the Global Accreditation Cooperation Incorporated, within which conformity assessment and related matters—including the use of AI—are expected to be discussed going forward.

In Europe, discussions are underway on the reorganization and simplification of product regulations in anticipation of digitalization and related developments, as well as on the division of roles for harmonized standards, and the acceleration of standards development is also under consideration.

In the United States, the "U.S. Standards Strategy 2025" has been announced, calling for enhanced leadership and collaboration in international standards (ISO/IEC, etc.), greater visibility of the value of standards for competitiveness, safety, and market access, and the acceleration of standards development.

In this way, the advancement of AI and digital technologies is calling into question the very nature of existing regulations, standards, and certification systems. Japan is in a situation where it is required to actively participate in international discussions within this broader context, and to examine a comprehensive strategy for standards and rules that takes into account the advancement of AI utilization and digitalization.

[19] At the end of FY2025, the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters surveyed concerned government ministries and agencies regarding the status of initiatives (including planned ones) through the end of FY2025, and compiled the reported results.

(Direction of Measures)

In light of the above, Japan will continue to advance specific initiatives based on the "New International Standards Strategy" and will further pursue the following measures.

<Specific Initiatives by Ministries and Agencies>

① Efforts by Industry, Government, Academia, and Finance

- Not only in the strategic and important domains of the New International Standards Strategy but also centering on the 17 strategic fields of Japan's Growth Strategy and the important technology areas of the 7th Science, Technology and Innovation Basic Plan, it is necessary to strengthen public-private collaboration—including government-initiated efforts—and to integrate R&D, intellectual property, standardization, and business strategies through the promotion of open & close strategies. In particular, the government shall incorporate international standardization into the Public-Private Investment Roadmaps of the growth strategy centered on the 17 strategic fields, promote standardization activities, and proactively request and secure the necessary budgets for this purpose.

  (Short term and mid term) (Concerned government ministries and agencies)

- In order to strategically pursue international standardization activities from the perspective of economic security, an international standardization perspective shall be incorporated into initiatives such as the K Program (Economic Security Promotion Program for Important Technologies).

  (Short term and mid term) (CAO (CSTI), MEXT, METI)

- In order to promote R&D, intellectual property, standardization, and business strategies in an integrated manner, necessary measures shall be taken, including: formulation of IP/standards maps; support for strategic deliberation and standards development by IP/standards experts; flexible patent examination aligned with the progress of standards development; acceleration of standards development; promotion of government-led strategic standardization activities; establishment of a framework to seamlessly advance the process from standardization strategy formulation through standards development and utilization; and strengthening of domestic certification bodies through enhanced regulatory response and certification infrastructure both domestically and internationally.

  (Short term and mid term) (METI, JPO)

- In order to foster awareness and behavioral change among the business community, particularly at the senior management level, the government shall

leverage the "models" of approaches presented by the government, and the "accompanying functions" provided by specialized institutions to integrate international standardization into corporate management practices.

(Short term and mid term) (METI)

- In order to foster awareness and behavioral change among the business community (particularly senior management), initiatives related to the Chief Standardization Officer (CSO) within corporations shall be promoted.

(Short term and mid term) (METI)

- Drawing on precedents such as the Green Innovation Fund, ministries and agencies shall be encouraged to provide standardization support at the pre-R&D and mid-development phases.

(Short term and mid term) (CAO (IP))

- From the perspectives of "defense (defensive response)" and "coordination" in response to strategic proposals by other countries, efforts shall be made to enhance awareness among national research and development agencies and universities, strengthen collaboration among these institutions, and ensure appropriate evaluation of standardization activities.

(Short term and mid term) (CAO (IP), MEXT, METI)

- To encourage the use of standards in both public and private procurement, JIS (Japanese Industrial Standards) shall be utilized in public procurement in accordance with the "Guidance on Citing JIS Standards in Public Procurement (Ver. 1.0)." The use of international and domestic standards in the provision of subsidies shall also be promoted.

(Short term and mid term) (CAO (IP), concerned government ministries and agencies)

- To enable each ministry and agency to strategically utilize international standardization activities as a policy tool, best practices across ministries and agencies, as well as knowledge of relevant models and methodologies related to international standardization activities, shall be shared. In addition, the use of domestic standards shall be explored, and in cases where progress cannot be made by relying solely on private sector initiatives, the competent ministry or agency shall proactively engage in standards development.

(Short term and mid term) (CAO (IP), METI, concerned government ministries and agencies)

- Regulations, accreditation, and certification frameworks shall be reviewed to ensure alignment and interoperability with international and domestic standards,

and efforts shall be made to raise awareness of certification marks.

(Short term and mid term) (Concerned government ministries and agencies)

② Strengthening the Standards Ecosystem

- Ministries and agencies shall promote human resource development and networking related to standards development, dissemination, certification, and standardization strategies through training, participation in international conferences, lobbying, and other means within their respective sectors, while also pursuing efficient human resource development through inter-ministerial and cross-sectoral collaboration and knowledge sharing beyond individual ministries, agencies and sectors.

(Short term and mid term) (CAO (IP), concerned government ministries and agencies)

- In order to incorporate international standardization activities into personnel evaluations at national research and development agencies and universities, methodologies shall be examined and best practice cases shall be accumulated.

(Short term and mid term) (CAO (IP), METI, concerned government ministries and agencies)

- In academia, including universities and research institutions, human resource development in the field of standardization shall be promoted, and the government shall support efforts to ensure that organizational engagement in international standardization for the social implementation of R&D is appropriately reflected in personnel evaluations, including through broad dissemination to universities and other institutions of the importance of international standardization and best practices.

(Short term and mid term) (CAO (IP), METI, MEXT , concerned government ministries and agencies)

- To incorporate standardization strategies into management strategies and to support human resource development, clear career pathways for appropriate personnel evaluation in industry shall be presented.

(Short term and mid term) (CAO (IP))

- Support shall be provided to improve efficiency, accelerate processes, and reduce the labor required for document preparation, analysis, and translation related to standardization activities through the use of AI and digital technologies. In addition, approaches to human resource development for standardization in response to advances in AI and digital technologies shall be examined.

(Short term and mid term) (CAO (IP), METI)

- In order to enable Japanese companies to develop and secure overseas markets while protecting sensitive information, and to prevent risks of unauthorized access and information risks posed by digital architectures and goods and services in the domestic market, efforts shall be advanced to strengthen collaboration between domestic and overseas certification bodies, provide consulting services to individual companies, match the needs of industry with domestic certification bodies, develop data platforms, promote collaboration among domestic certification bodies, and strengthen collaboration with domestic and overseas certification bodies including through the possible use of policy-based finance.

  (Short term and mid term) (METI, CAO (IP))
- In order to promote the use of standards in laws, regulations and voluntary rules, best practice cases shall be accumulated and guidelines for ministries and agencies shall be formulated.

  (Short term and mid term) (CAO (IP))
- To develop the foundation of the certification industry, the development of an inventory of use cases to promote the use of domestic certification bodies by industry shall be considered, with a view to securing necessary testing equipment and strengthening information provision and technical support to industry.

  (Short term and mid term) (METI)

③ Clarifying Standards Strategies and Governance

- While continuing to conduct monitoring and follow-up, efforts shall be made to establish more efficient and effective monitoring and follow-up for accurate understanding and analysis of domestic and international standardization activities, including through appropriate KPI setting, organization by phase of the international standardization process, and establishment of methodologies including the capture of international standardization activities led by private-sector actors. In addition, a mechanism shall be developed to ensure that the information obtained reaches diverse stakeholders, including those directly engaged in standardization activities, in an appropriate manner.

  (Short term and mid term) (CAO (IP), concerned government ministries and agencies)
- To strengthen the coordination and oversight function of the public-private high-level forum on international standardization, specific initiatives shall be advanced (including information sharing and matching of human resources and know-how related to international standardization activities, and the creation of use cases),

along with strengthening of the secretariat function on a unified public-private basis. Furthermore, in order to exercise a higher-level coordination and oversight function within the government, the establishment of an organization to comprehensively oversee the government's overall standardization policies on a cross-cutting basis (such as a Director-General for International Standardization (tentative name)) shall be examined.

(Short term and mid term) (CAO (IP), concerned government ministries and agencies)

- In collaboration with overseas offices, efforts shall continue to collect local information from abroad, and the methodology for sharing key points of such information with public and private stakeholders in Japan shall be refined to ensure that such information translates into concrete action.

(Short term and mid term) (CAO (IP), concerned government ministries and agencies)

- Focusing on the strategic and important domains of the New International Standards Strategy, the 17 strategic fields of the growth strategy, and the important technology areas of the Science, Technology and Innovation Basic Plan, the establishment of public-private collaboration frameworks for international standardization in each domain and the formulation of international standards strategies shall be advanced through the presentation of models and other means.

(Short term and mid term) (CAO (IP), concerned government ministries and agencies)

- An international standards strategy for the agriculture, forestry, fisheries, and food sectors shall be formulated and effectively implemented, and concerned government ministries and agencies shall collaborate and cooperate with relevant incorporated administrative agencies and other related organizations to promote international standardization activities. In addition, to realize the needs for international standardization in this sector, a system for communication, information sharing, and consultation among regional stakeholders shall be steadily operated to support businesses and others engaged in international standardization.

(Short term and mid term) (MAFF)

④ Strengthening International Collaboration

- Efforts to host the 2029 IEC General Meeting to Japan shall continue.

(Short term and mid term) (METI)

- Efforts shall be advanced to participate in international conferences in each sector, strategically secure key positions, including those of conveners, strengthen collaboration with individual countries and regions, and ensure interoperability through international collaboration, along with the establishment of mechanisms including methodologies and KPIs for these efforts.

  (Short term and mid term) (Concerned government ministries and agencies)

- Without insisting on self-reliance, cross-sectoral public-private collaboration shall be pursued to strengthen ties with overseas partners, and support for developing countries toward international standardization through ODA shall be further strengthened.

  (Short term and mid term) (MOFA, concerned government ministries and agencies)

- International cooperation from the early research stage, as well as the addition of international standardization as one of the themes in international collaboration not primarily aimed at standardization, shall be pursued to facilitate smooth international standardization and its dissemination.

  (Short term and mid term) (CAO (IP), concerned government ministries and agencies)

<Domain-Specific Initiatives>

- In each domain, efforts shall be made to formulate and implement international standards strategies that incorporate specific targets, KPIs, key actors, and schedules for international standardization, conduct appropriate monitoring and follow-up, develop human resources engaged in international standardization activities, and actively participate in international conferences.

  (Short term and mid term) (Concerned government ministries and agencies)

- Through model initiatives related to the formulation of domain-specific international standards strategies and verification of the extent to which international standardization activities contribute to Japan's Growth Strategy, the methodology for international standardization activities shall be established.

  (Short term and mid term) (CAO (IP))

- In cases where sufficient domestic frameworks have not yet been established for new areas, efforts shall be made to develop key actors and promote collaboration among concerned government ministries and agencies and the industrial and academic communities, with the assistance of specialized organizations and other relevant entities.

(Short term and mid term) (CAO (IP))

The following items shall be considered in examining future initiatives for each domain, taking into account the descriptions of each domain in the "New International Standards Strategy," the results of current year's follow-up and monitoring, information provided by overseas public-private networks, and the Public-Private Investment Roadmaps for the 17 strategic fields of the growth strategy.

①-1 Environment/Energy (Climate Change, Energy, and GX)

- Concepts and management related to transition; international evaluation methods at the manufacturing process and product level; GHG (greenhouse gas) emission calculation and reporting; credit utilization rules, etc.
  (* Individual sectors that may be subject to initiatives: renewable energy; hydrogen and ammonia; green steel; renewable energy-related products (next-generation (perovskite) solar cells, solar panels, storage batteries (lithium-ion batteries, redox flow batteries, sodium-sulfur batteries, etc.)); nuclear power; energy management systems (smart grids, etc.); energy-saving technologies (inverters, etc.); regional and building energy use (ZEB/ZEH, CES, etc.); CO2 reduction in manufacturing processes (CO2 reduction in steelmaking processes, etc.); negative emissions (CO2 storage/fixation in the ocean, CCS/CCUS, etc.); CO2 utilization (methanol, methanation, synthetic fuels, artificial photosynthesis, concrete, etc.); sustainable finance, carbon pricing, and carbon credits; methodologies and protocols for GHG emission estimation or calculation, etc.)

(Short term and mid term) (CAO (CSTI), MEXT, MAFF, METI, MLIT, MOE)

①-2 Environment/Energy (Nature-Positive)

- Nature-positive concepts and management; unique indicators and datasets for related information disclosure; international evaluation methods at the product level for the dissemination of nature-positive products and services; valuation and trading rules for natural capital and biodiversity, etc.
  (* Individual sectors that may be subject to initiatives: conservation and restoration of biodiversity (OECMs, etc.); conservation and restoration of natural capital (ceramic membrane treatment, UV-LED treatment, and nitrogen-phosphorus circulation systems for water resources, etc.); biotechnology; environmentally friendly primary industries; green infrastructure; NbS; Eco-DRR; monitoring, measurement, and visualization protocols for ecosystems and biodiversity

(observation, assessment (including indicator development), and prediction of ecosystems and biodiversity, etc.); nature finance and biodiversity value trading, etc.)

(Short term and mid term) (MAFF, METI, MLIT, MOE)

①-3 Environment/Energy (Circular Economy)

- Resource circulation technologies such as 3R (reduce, reuse, recycle); management related to inter-company collaboration; data management for environmental information on products; ecodesign tailored to the actual conditions of each product; regulations and systems related to the circular economy; circularity indicators and information disclosure schemes, etc.
  (* Individual sectors that may be subject to initiatives: resource circulation technologies and equipment (3R technologies and equipment, incineration technologies and equipment, etc.); circular economy-type businesses (value networks, ecodesign, remake, upcycling, remanufacturing businesses, etc.); utilization of renewable and underutilized resources (utilization of biomass resources, biomanufacturing, production of SAF fuel from waste cooking oil, etc.); data management for resource circulation; data platforms; measurement methods, indicators, and protocols for circularity; circularity information disclosure schemes, etc.)
  (Short term and mid term) (CAO (CSTI), Consumer Affairs Agency, MAFF, METI, MLIT, MOE)

② Food/Agriculture, Forestry and Fisheries

- Smart agricultural technologies; requirements for environmentally friendly agriculture; definitions and testing methods for high-quality, high-value-added agricultural, forestry, and fishery products and food; concepts for nutritional assessment of overall diets, etc.
  (* Individual sectors that may be subject to initiatives: high-quality, high-value-added agricultural, forestry, and fishery products and food (agricultural, forestry, and fishery products and food targeting overseas markets; high-functional bio-materials, etc.); sustainable agriculture, forestry, fisheries, and food industries (smart agriculture, food tech and food chains, sustainable aquaculture, nutritional assessment of food, etc.); plant factories; land-based aquaculture; GHG reduction and absorption businesses (forest absorption, paddy field management, soil carbon sequestration, etc.))

(Short term and mid term) (Consumer Affairs Agency, MOFA, MHLW, MAFF)

③ Disaster Prevention

- Disaster risk finance to incentivize pre-disaster investment; requirements for quality infrastructure; data formats for sharing disaster information, etc.
  (* Individual sectors that may be subject to initiatives: quality infrastructure construction and maintenance technologies (seismic resistance and seismic isolation technologies for buildings, etc.; construction methods and infrastructure resilient to disasters; diagnostic technologies and life-extension technologies for aging infrastructure, etc.); disaster prevention technologies; water disaster prevention and related services (resilience, sensors (observation), risk assessment, simulation, warning systems, data linkage, disaster response products, insurance services), etc.)

(Short term and mid term) (CAO (Disaster Management), METI, MLIT)

④-1 Digital/AI (Digital)

- Operation of digital identity with interoperability ensured; data space standards ensuring safe and free data distribution in data linkage infrastructure; and collaboration with overseas data spaces
  (* Individual sectors that may be subject to initiatives: digital public infrastructure/government and local government DX platforms; digital platforms; industrial data linkage (Ouranos Ecosystem, etc.); robotics and smart manufacturing; computer architecture (including data linkage infrastructure and IoT); cybersecurity and trust (including DFFT), etc.)

(Short term and mid term) (Digital Agency, MIC, METI)

④-2 Digital/AI (AI)

- AI safety requirements; data quality, structure, and formats required for data analysis and machine learning; vertical AI; safety and operational standards contributing to the widespread adoption of robots collaborating with humans, etc.
  (* Individual sectors that may be subject to initiatives: generative AI; AI safety; physical AI; vertical AI)

(Short term and mid term) (CAO (CSTI), Digital Agency, MIC, METI, MEXT)

⑤ Mobility

- Data formats for logistics to enable collaboration among operators and systems;

safety and environmental performance requirements for the development and market acquisition of next-generation aircraft; safety and environmental standards for the development and market acquisition of next-generation vessels; performance evaluation of railways and ports; safety testing standards for on-board storage batteries for next-generation vehicles, etc.
(* Individual sectors that may be subject to initiatives: next-generation vehicles (SDVs, autonomous driving, EVs, all-solid-state batteries, etc.); commercial aircraft; next-generation aircraft; unmanned aerial vehicles; flying cars; next-generation vessels; port cargo handling machinery; railways and ports; MaaS; logistics systems, etc.)

(Short term and mid term) (CAO (Economic Cooperation Infrastructure), MLIT, METI)

⑥ Information and Communications

・ All-optical network fields; non-terrestrial network (NTN) fields; radio access network (RAN) fields, etc., toward the realization of next-generation information and communications infrastructure
(* Individual sectors that may be subject to initiatives: Beyond 5G (all-optical networks, NTN, RAN, etc.), etc.)

(Short-term and mid-term) (MIC)

⑦ Quantum technology

・ For quantum computers: performance evaluation indicators for hardware and software, and standardization of components, etc.; for quantum cryptographic communications: network protocols and implementation security certification for quantum key distribution (QKD) devices, etc.; for quantum sensing: performance evaluation of components, etc.
(* Individual sectors that may be subject to initiatives: quantum computers (applications, middleware, hardware, etc.); quantum security and quantum networks (quantum cryptographic communications and quantum networks); quantum sensing and materials)

(Short-term and mid-term) (CAO (CSTI), MIC, METI, MEXT)

⑧ Bioeconomy

・ Conceptualization of the added value of biomanufacturing; safety standards for biomanufacturing; establishment of biomanufacturing technologies; quality

standards and certification for bio-derived products, among others.
(* Individual sectors potentially subject to initiatives: biomanufacturing and bio-derived products, including microbial and cell design platform technologies; biopharmaceuticals and regenerative medicine products; large-scale microbial culture; production technologies such as fermentation and related measurement technologies; and evaluation methods for environmental load reduction effects, among others.)

(Short term and mid term) (CAO (CSTI), MEXT, MAFF, METI, MOE)

⑨ Nursing Care/Welfare

・ High-quality nursing care services through the standardization of quality and safety requirements; guidelines for the use of welfare equipment; safety and quality evaluation of nursing care technologies such as service robots, etc.
(* Individual sectors that may be subject to initiatives: nursing care services; welfare equipment for persons with disabilities; nursing care technologies, etc.)

(Short term and mid term) (Children and Families Agency, MHLW, METI)

⑩ Infrastructure

・ Data formats and usage guidelines suited to Japan's technologies; construction of disaster-response smart cities through the integration of foundational systems and disaster prevention technologies; BIM/CIM standards and guidelines, 3D urban models, etc., for improving the efficiency of construction production and management systems
(* Individual sectors that may be subject to initiatives: location information and geospatial information; infrastructure foundations (roads, ports, water and sewage systems, etc.); port cargo handling machinery; construction machinery; BIM/CIM; smart cities and urban development; regional revitalization (related to infrastructure development), etc.)

(Short term and mid term) (Cabinet Secretariat (Economic Cooperation Infrastructure), CAO (CSTI), MOFA, MLIT)

⑪ Fusion

・ Concept formation and safety standards related to the safety and utility of fusion energy; design and construction standards for fusion reactors; material standards for component materials; welding standards and quality testing standards; tritium management, measurement equipment, and safety management systems, etc.

(* Individual sectors that may be subject to initiatives: fusion energy (plasma physics and radiation, blankets, fuel cycles, heat transport and power generation, superconducting and magnetic field technologies, materials and component materials))

(Short term and mid term) (CAO (CSTI), MEXT)

⑫ Space

- Norms including safety standards for cooperative space development; prevention of space debris generation, among others.

(* Individual sectors potentially subject to initiatives: space equipment (including small satellites); rockets; launch sites; satellite data; new services (such as resource development, transportation, and space debris removal, among others.))

(Short term and mid term) (CAO (Space), MEXT, METI)

⑬ Semiconductors

- Semiconductor performance and manufacturing requirements with consideration for energy efficiency and the environment; semiconductor testing and evaluation methods; authenticity assurance, etc.

(* Individual sectors that may be subject to initiatives: logic semiconductors, memory semiconductors, power semiconductors; manufacturing equipment, etc.)

(Short term and mid term) (METI)

⑭ Materials

- Standards related to sustainable manufacturing; measurement methods and quality evaluation for functional materials, etc.; data standards in anticipation of the transition to data-driven R&D, etc.

(* Individual sectors that may be subject to initiatives: innovative materials (carbon fiber, ultra-high-performance ceramics, cellulose nanofibers, permanent magnets, next-generation elements, rare metal/rare earth-free materials, etc.); materials informatics and process informatics (including operando measurement), etc.)

(Short term and mid term) (MEXT, METI)

⑮ Resources

- Standards related to sustainable manufacturing; quality evaluation of components using resource-saving and alternative materials, etc.

(* Individual sectors that may be subject to initiatives: rare earths; rare metals; base

metals; sustainable raw materials and supply chains)

(Short term and mid term) (METI)

⑯ Ocean

- In particular, regarding the securing of navigational safety: performance and technical standards for VDES, etc.
  (* Individual sectors that may be subject to initiatives: marine resources (production technologies, survey technologies, autonomous underwater vehicles (AUVs), etc.); marine unmanned vehicles; navigational safety (VDES, etc.))

(Short term and mid term) (CAO (Ocean/CSTI), METI, MLIT)

⑰ Medical/Healthcare

- Interoperability of medical data and secondary use of data; performance and safety standards for medical technologies and devices such as wearable devices; and guidance and regulatory harmonization related to pharmaceuticals and medical technologies, including biopharmaceuticals, among others.
  (* Individual sectors potentially subject to initiatives: medical technologies (including regenerative medicine, neurotech, and braintech); pharmaceuticals (including biopharmaceuticals, first-in-class products, and best-in-class products); medical devices; digital health (including personalized medicine, precision medicine, and data linkage, among others.); and infectious disease response products, among others.)

(Short term and mid term) (CAO (CSTI/Health and Medical), MEXT, MHLW, METI)

<Overall Initiatives>

- Verification shall be advanced as to whether it is possible to analyze the extent to which international standardization activities contribute to Japan's GDP and other economic indicators, as well as to Japan's growth strategy, and the establishment of KGIs (Key Goal Indicators) shall be examined.

(Short term and mid term) (CAO (IP))

- In light of advances in AI utilization and data/digitalization, and aiming for overall optimization rather than partial optimization, the appropriate form of cross-domain rules and standardization—such as ensuring interoperability on a System of Systems that integrates entire systems and multiple systems beyond the

conventional boundaries of goods and services—and the appropriate form of professional services as key actors in this regard shall be examined.

(Short term and mid term) (CAO (IP))

- Since international standards are a tool through which one can prevail in business even when technologically inferior, including from the perspective of defense against overseas-led international standardization, international standardization shall be built into the Public-Private Investment Roadmaps of Japan's Growth Strategy centered on the 17 strategic fields, and resources shall be allocated to international standardization activities aimed at winning in business. In doing so, efforts shall be made in coordination with initiatives related to the important technology areas of the 7th Science, Technology and Innovation Basic Plan, to promote R&D, intellectual property, standardization, and business strategies in an integrated manner.

  (Short term and mid term) (Concerned government ministries and agencies)
- Regarding the defense industry and the content industry, which are not currently included in the strategic and important domains of the "New International Standards Strategy", monitoring and follow-up shall be conducted to keep abreast of international standardization trends.

  (Short term and mid term) (CAO (IP), concerned government ministries and agencies)

（4） Development of an Environment for Data Distribution and Utilization

(Current Status and Challenges)

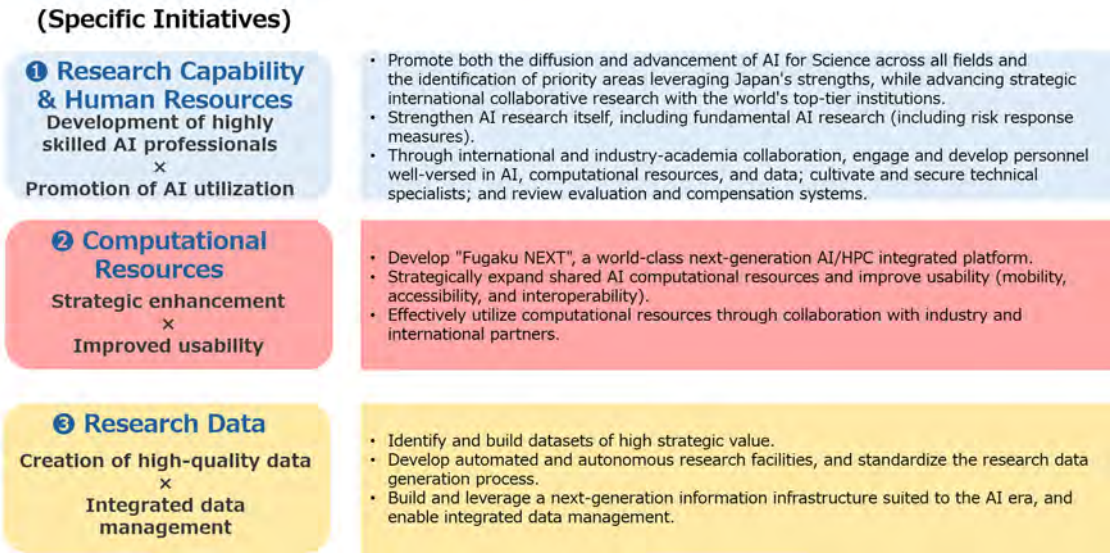
In June 2025, the government formulated the "Basic Policy on the Approach to Data Utilization Systems" (decided by the Digital Administrative and Fiscal Reform Council), which sets out the direction for realizing a data-driven society that fully implements the social deployment of data and AI to complement limited human resources through efficiency improvements under a declining population, while also creating new value and knowledge to improve the quality of life of each individual and achieve personal happiness, freedom, and well-being, thereby achieving both a sustainable Japanese society and economic growth.

Based on this policy, efforts are being made to develop an environment that balances the protection and utilization of data including personal information. Most recently, from the perspective of ensuring appropriate protection of individual rights and interests while promoting appropriate data linkage and utilization that also contributes to AI development and other purposes, the "Bill for Partial Amendment of the Act on the

Advancement of Government Administration Processes That Use Information and Communications Technology and the Act on Facilitation of Information Processing" and the "Bill for Partial Amendment of the Act on the Protection of Personal Information and Related Acts" were submitted to the Diet.

Progress is also being made in the field of research data, and in December 2025, the "Working Group on the Approach to Management, Utilization, and Distribution of Research Data Supporting AI for Science" was established under the Science Council of Japan. In anticipation of the creation of even larger volumes of data than before due to the automation, autonomization, and remote operation of research systems, and taking into account international trends toward open science, deliberations are underway on the appropriate approach to the management, utilization, and distribution of research data supporting AI for Science, with the direction set for a summary to be compiled by around June 2026.

In the 7th Science, Technology and Innovation Basic Plan, AI for Science is positioned as an important theme, and going forward, Japan is required to establish its position as a leading country in AI for Science through strategic international collaboration and the development of a research environment suited to the AI era and the transformation of scientific research processes. (Figure 36)



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

Figure 36: Basic Strategic Policy for Promoting AI for Science

(Direction of Measures)

- As the automation, autonomization, and remote operation of research systems are expected to generate even larger volumes of data than before, and as higher-

quality research data management and utilization are required for the advancement of AI, deliberations shall be conducted on the appropriate approach to the management, utilization, and distribution of research data supporting AI for Science. Based on the "Basic Strategic Policy for Promoting AI for Science," the construction of an environment capable of continuously generating high-quality and large volumes of data shall be pursued, along with the advancement of research data infrastructure NII RDC and distribution infrastructure SINET suited to the AI era. In addition, efforts shall continue to attach metadata to research data to make it searchable on the research data infrastructure NII RDC, and the horizontal dissemination of leading cases and challenges shall be promoted.

(Short term and mid term) (MEXT, CAO (SSTIP), concerned government ministries)

- Free provision of recommended modules for data linkage infrastructure and advice on their use shall be provided, and the development and utilization of integrated area data linkage infrastructure in each region based on the "Vision for Shared Use of Data Linkage Infrastructure" centered on prefectures shall be supported, thereby promoting data utilization in regions through data linkage across multiple services (sectors) while avoiding redundant investment in infrastructure with the same functions within prefectures.

(Short term and mid term) (Digital Agency)

- In the agricultural sector, in order to enable safe data linkage across manufacturers and systems, the "Guidelines for the Development of Open APIs in the Agricultural Sector" were formulated in FY2020, and the development of open APIs (a mechanism by which businesses such as manufacturers publicly disclose the connection specifications (APIs) for their own systems to external parties and allow access for linkage under certain conditions) for acquiring location information, working hours, growth data, and other information for major agricultural machinery (tractors, rice transplanters, combine harvesters, and grain circulation dryers) and controlled horticulture equipment (environmental monitoring devices and environmental control devices), as well as the development of new services utilizing the implemented and published open APIs, have been supported. From FY2026 onward, the sharing and utilization of agriculture-related data shall be promoted through the development of open APIs for equipment not yet covered, such as water management systems, and the development of new services utilizing the open APIs developed to date.

(Short term and mid term) (MAFF)

- In line with the "Roadmap for Promoting Medical DX" formulated in June 2023,

initiatives related to each measure are being promoted. From FY2024, the construction of the "Electronic Medical Record Information Sharing Service" for sharing necessary medical information among medical institutions has been underway, and verification toward full-scale operation has been progressing through a model project since February 2025. With the aim of commencing nationwide operation around the winter of FY2026, verification shall continue and deliberations on full-scale operation shall be advanced.

(Short term and mid term) (MHLW)

- Regarding disaster prevention, the rules for information sharing among disaster response agencies and with other information distribution infrastructure through the new Comprehensive Disaster Management Information System (SOBO-WEB), which commenced operation in April 2024, are being organized as protocols, and deliberations are being advanced to promote data distribution in the disaster prevention sector, including linkage with the Digital Agency's data linkage infrastructure currently under consideration and standardization of distributed data.

(Short term and mid term) (CAO (Disaster Management))

4. Follow-up on the New Cool Japan Strategy

（1） Promotion of the Cool Japan Strategy

(Current situation and challenges)

Inbound tourism consumption in 2025 reached 9,454.9 billion yen (up 16.4% from 2024). While high-value-added travelers accounted for only 2% of all inbound visitors in 2023, they represented 19% (approximately 1 trillion yen) of total consumption, demonstrating the extremely high economic impact of high-value-added travelers[20]. High-value-added travelers are generally said to have strong intellectual curiosity and a spirit of inquiry, and since tourism trends among inbound visitors vary by country and region, it is important to set targets and implement measures that reflect the trends of inbound tourists and the reception capacity of each region.

The Japan Tourism Agency has been implementing strategic inbound promotion through the Japan National Tourism Organization (hereinafter "JNTO"), as well as providing support for the creation and enhancement of tourism content that leverages regional tourism resources and leads to "experiential consumption" by inbound visitors, in order to further accelerate the diversification of the inbound market. On the other hand, in some areas and at certain times, excessive congestion and violations of

[20] JNTO "High Value-Added Tourism Market for Inbound Visitors in 2023"
https://www.jnto.go.jp/news/_files/20250611_1400.pdf

manners have been causing disruptions to residents' daily lives. Measures are also needed to ensure reception capacity, including reducing waiting times at airports and other entry/exit-related measures. The Basic Plan for the Promotion of Tourism Nation (approved by Cabinet Decision of March 27, Reiwa 8)[21] sets out "reconciling strategic attraction of inbound visitors with ensuring the quality of residents' lives" as a key policy pillar, and is advancing efforts including countermeasures against excessive congestion and violations of manners, enhancement of the appeal of regional tourist destinations and strengthening of transportation networks, promotion of regional tourism through securing and improving secondary transportation[22], and development of an environment for smooth and appropriate entry/exit[23] and customs procedures.

Regarding agricultural, forestry and fishery products and food, amid expectations of expanding food markets centered on Asia and Western countries due to growing world population and other factors, Japan's export value in 2025 reached 1.7 trillion yen (up 12.8% year-on-year), inbound food-related consumption in 2025[24] reached 2.7 trillion yen (up 17.2% year-on-year), and revenue from overseas expansion of the food industry in 2023[25] reached 1.7 trillion yen (up 8.7% year-on-year), all reaching record highs. The Ministry of Agriculture, Forestry and Fisheries and the National Tax Agency are working in coordination to accelerate the expansion of exports of agricultural, forestry and fishery products and food, while also promoting overseas expansion of the food

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[21] Basic Plan for the Promotion of Tourism Nation(Cabinet Decision, March 27, 2026)https://www.mlit.go.jp/kankocho/news02_00077.html

[22] Regarding secondary transportation at tourist destinations, efforts are being made to ensure and enhance transportation means for access from major transportation hubs such as Shinkansen and limited express train stops to tourist attractions, as well as for intra-regional travel, and to improve convenience for users. In order to address the shortage of "human resources" and "means of mobility" in regional transportation, a private vehicle utilization service was established in March 2024, enabling the provision of transportation services utilizing private vehicles and general drivers under the management of taxi operators. According to the Cabinet Office Regulatory Reform Promotion Council's Working Group on Regional Revitalization and Labor Shortage Response, "Verification of the Status of Improvement in the Shortage of Means of Mobility and Evaluation of Verification Results from the User's Perspective as of March 2025" (April 9, 2025), approximately 60% of inbound foreign visitors responded that they had experienced difficulty with transportation during their stay in Japan. Furthermore, among those who had experience using ride-sharing services in their home countries, more than 80% responded that they would like to use such services in Japan as well. As reasons for wanting to use ride-sharing, more than 60% responded that they were accustomed to using ride-sharing, nearly 50% responded that they could use apps they normally use, and approximately 45% responded that they could know the fare in advance. In addition, more than 60% responded that they expect improvements in ease of mobility if ride-sharing becomes available, and approximately 75% of those who responded that there were things they could have done more if ride-sharing had been introduced indicated that they could have visited more distant tourist destinations, accommodations, and restaurants. Taking into account the results of these survey findings, committee members expressed the opinion that further improvements in transportation convenience should be pursued.

[23] Regarding the reduction of waiting times at immigration inspection at airports and other measures, preparations are underway for the introduction by fiscal year 2028 of the Japan Electronic System for Travel Authorization (JESTA), an electronic travel authorization system that requires foreign nationals from visa-exempt countries and regions who are short-term visitors for tourism and other purposes to provide necessary information online prior to entry for screening purposes.

[24] Inbound food-related consumption expenditure: Estimated by the Ministry of Agriculture, Forestry and Fisheries based on the Japan Tourism Agency's "Survey on Consumption Trends of Inbound Tourists," covering dining expenses and food-related shopping costs among total travel consumption expenditures by foreign visitors to Japan.

[25] Revenue from overseas expansion of the food industry: Outward direct investment income of food manufacturing industries, etc., and royalties and license fees, estimated by the Ministry of Agriculture, Forestry and Fisheries based on the Ministry of Finance's "Balance of Payments Statistics" and the Ministry of Economy, Trade and Industry's "Basic Survey on Overseas Business Activities."

industry and expanding food-related consumption by inbound visitors[26].

Regarding fashion, the global apparel market is a growth market, with projections of a 5% annual increase. Japan has traditionally had a large share of fabric exports, but in recent years, exports of finished products such as clothing have been on an increasing trend. Multiple Japanese companies and brands are ranked in Fashion United's top 200 apparel companies by current value and top 100 by brand value worldwide, indicating high creative recognition[27]. For this reason, the creation of domestic fashion brands that achieve high added value through the use of traditional techniques is expected. In addition, responses to new commercial flows that differ from conventional ones, such as the spread of social media and the global growth of e-commerce, are also required.

From June 2025, the METI has been holding the "Entertainment and Creative Industry Policy Study Group" to examine an action plan for improving productivity and profitability across the fashion industry as a whole and strengthening international competitiveness, including enhancing Japan's brand value through cross-industry collaboration and domain integration[28].

Regarding cosmetics, while the global cosmetics market size in 2023 was 484.4 billion US dollars (approximately 70 trillion yen), making it a growth market worldwide, Japan's market size has fallen to 4th place (3rd place in 2022), behind the United States, China, and Brazil. Meanwhile, China and South Korea, which have strong social media and e-commerce capabilities, have positioned the Beauty industry[29] as a strategic industry and are accelerating its overseas expansion through collaboration with the content industry, strengthening their presence in the global market.

Japan's cosmetics exports had been dominated by China, which accounted for more than 50% of export value since 2020, but in recent years, exports to China, Hong Kong, and South Korea have declined, while exports to Taiwan, Thailand, and Vietnam have grown in 2024. Import values have also been increasing year by year. Japanese cosmetics are highly regarded worldwide for their high quality and natural ingredients used as raw materials, and overseas expansion has traditionally been led primarily by large companies. In recent years, as economic growth has raised income levels in emerging economies, particularly in Asia, demand for cosmetics has been expanding rapidly, making it important for companies including small and medium-sized

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[26] Ministerial Meeting on Responses to Import Regulations of Destination Countries and Other Matters for Expanding Exports of Agricultural, Forestry and Fishery Products and Food

[27] On March 7, 2026 (local time), at the Paris Fashion Week Gala Show, a special runway featuring traditional Japanese materials was unveiled as a cultural project aimed at reinterpreting Japan's traditional materials as contemporary couture and showcasing them to the world, further elevating Japan's global recognition in this field.

[28] Study Group on Entertainment and Creative Industry Policy
https://www.meti.go.jp/shingikai/mono_info_service/entertainment_creative/index.html

[29] In this plan, this refers to the Beauty industry in China and South Korea.

enterprises to move away from business models that rely solely on domestic demand. In June 2026, the METI "Cosmetics Industry Competitiveness Enhancement Study Group" compiled an interim report, setting out an analysis of challenges and the direction of measures toward expanding overseas markets[30]. Furthermore, when pursuing overseas expansion and strengthening international competitiveness of cosmetics, it is also important for the entire J-Beauty industry[31], including cosmetics, to work together toward enhancing brand value, and there is a need to strengthen collaborative efforts in areas of cooperation among relevant industries.

＜Selection of FY2025 "Content Regional Revitalization Bases"＞

Based on the "Virtuous Cycle of Content and Regional Revitalization Plan" decided in the Intellectual Property Strategic Program 2025, in order to enhance the appeal of regional tourism including accommodation stays and to vitalize the content industry, 23 locations were selected as FY2025 "Content Regional Revitalization Bases " at the Cool Japan Strategy Council (6th meeting) held in March 2026, recognizing region-wide initiatives with large economic ripple effects originating from content[32].

The bases selected in FY2025 are centered on local governments and regional organizations that coordinate the entire region and have built cooperative relationships with content stakeholders. In the tourism promotion type, awareness and penetration of initiatives within the region are high, and there are efforts linking transportation and accommodation plans with local businesses and regional specialty products, but further efforts to enhance added value, improve secondary transportation, and extend length of stay are required. The industry promotion type is often incorporated into municipal basic plans, with a focus on nurturing young talent, creating connections with production companies, and attracting businesses, while business creation and market development are relatively limited. Cases were also observed where regional companies, financial institutions, and educational institutions collaborate on human resource development. Overseas dissemination is generally limited overall, but going forward, it is expected that the Content Regional Revitalization Bases will collaborate and disseminate information in a unified manner to expand the reach of their communications. In terms of measuring the effects of initiatives, the tourism promotion

[30] Study Group on Strengthening the Competitiveness of the Cosmetics Industry https://www.meti.go.jp/shingikai/mono_info_service/cosmetic_industry/index.html

[31] Industries in Japan that provide products and services such as cosmetics, beauty appliances, aesthetic devices, beauty supplies, hair care, nail care, and esthetic treatments.

[32] Content and Regional Revitalization Virtuous Cycle Plan: Under the Intellectual Property Strategic Program 2025, the "Content and Regional Revitalization Virtuous Cycle Plan" was decided, which aims to select approximately 200 content regional revitalization bases by 2033. https://www.cao.go.jp/cool_japan/koujunkan.html

type tends to measure visitor numbers, while the industry promotion type focuses on measuring employment and the number of workers. In promoting these initiatives, a common framework for evaluating economic effects at the regional level is necessary.

Inbound tourists who visit locations associated with films, anime, and other content generally have longer stays and higher average travel expenditure per person compared to general inbound tourists, and are likely to contribute significantly to the regional economy[33].

Regions are rich in resources unique to Japan, including "history" in the form of historic buildings and townscapes, "nature" that is diverse and varied by season and region, internationally acclaimed "food[34]" represented by Japanese cuisine, and "culture" including traditional crafts. Through their depiction in works of content, these resources are leading both foreign visitors and local residents to discover (or rediscover) the appeal of Japan (and their regions). Inbound tourists are said to have interest in and curiosity about "Japan as it is," as well as expectations for experiencing local food, festivals, and other traditional culture, though it should be noted that visitors differ in their historical and cultural backgrounds and in their interests and areas of curiosity.

For the content industry to maintain its competitiveness in the global market as a core industry of Japan, it is important to advance human resource development in collaboration with creative talent active overseas, to foster creators and business producers throughout the country, and to create an environment in which compelling content that draws on regional history, traditions, and nature can be produced.

＜Regarding KPIs＞

The "New Cool Japan Strategy" (decided by the Intellectual Property Strategy Headquarters on June 4, Reiwa 6) sets KPIs of "achieving a scale of 50 trillion yen or more by 2033 in terms of the economic impact of Cool Japan-related industries, including overseas expansion of content, inbound tourism consumption, overseas expansion of agricultural, forestry and fishery products and food, and overseas expansion of fashion and cosmetics" and "increasing the percentage of people in each country and region who 'I love Japan' by 10 percentage points by 2033." The

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[33] According to estimates by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters, based on the Japan Tourism Agency's "2024 Survey on Consumption Trends of Foreign Visitors to Japan," "Statistics on Visitors to Japan," and "2024 Survey on Consumption Trends of Inbound Tourists (Original Records)," the number of foreign visitors to Japan in 2024 who visited locations associated with films, anime, and other content was approximately 3 million, with total travel consumption amounting to approximately 927.7 billion yen. Furthermore, the estimated number of potential visitors to locations associated with films, anime, and other content was approximately 4.35 million, with estimated domestic travel consumption of approximately 1,344.5 billion yen.https://www.cas.go.jp/jp/seisakukaigi/titeki2/tyousakai/kousou/newcool/dai1/shiryo2.pdf

[34] A member pointed out that "food" should not be limited to dining out and similar activities, but should be viewed comprehensively across the entire food industry supply chain, with a perspective that considers it in an integrated manner with "agriculture," which serves as the starting point of that chain.

Intellectual Property Strategic Program 2025 stipulates that these KPIs will be followed up annually; accordingly, progress monitoring and analysis of challenges will continue, and the content of measures will be reviewed on an ongoing basis.

① Progress of Overseas Expansion of Cool Japan-Related Industries and Global Market Trends

The total overseas expansion of Cool Japan-related industries based on the latest figures amounts to 30.7 trillion yen, an increase of 3.6 trillion yen, or 13.42%, from the previous figure.

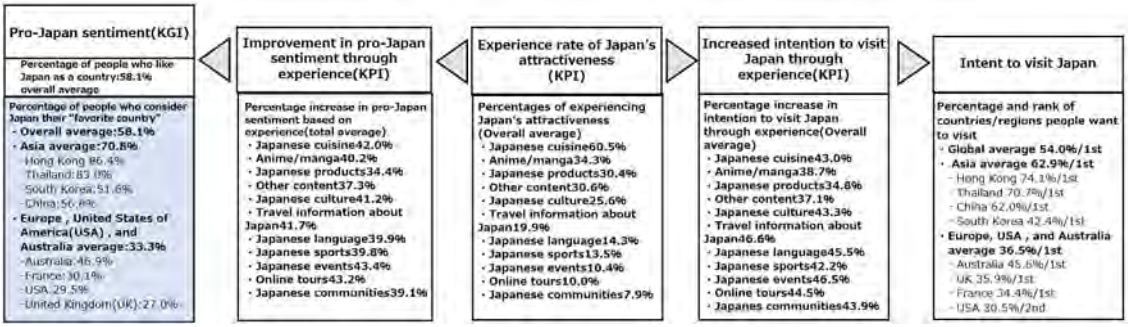
		Yen-based（trillion yen）			US dollar-based（Ten billion dollars）		
		Intellectual Property Strategic Program 2026	Intellectual Property Strategic Program 2025	Change (%)	Intellectual Property Strategic Program 2026	Intellectual Property Strategic Program 2025	Change (%)
Overseas expansion of content (overseas 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	Exports 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 in the food manufacturing industry	8.7 （2024）	7.3 （2023）	18.74	5.8 （2024）	5.2 （2023）	10.21
Fashion	Exports 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	Exports 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
Total		30.7	27.1	13.42	20.3	18.8	8.48

(Source) Compiled by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters based on various materials[35]

Figure 37: Progress of Overseas Expansion of Cool Japan-Related Industries (Yen-denominated and Dollar-denominated)

② Pro-Japan sentiment other attitudes among foreign nationals, etc.

Regarding pro-Japan sentiment based on the rate of experience of Japan's attractions, Japanese food and content have high experience rates among foreigners, and experiencing these Japanese attractions tends to increase pro-Japan sentiment and intention to visit Japan by approximately 40%, consistent with the previous results (Intellectual Property Strategic Program 2025). Increasing the rate of experience of Japan's attractions directly leads to higher pro-Japan sentiment and expansion of inbound tourism. In addition, pro-Japan sentiment is generally high in Asia, which is geographically adjacent to Japan, and it is important to leverage this high level of pro-Japan sentiment.



(Source) Compiled by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters based on "DBJ/JTBF Survey on the Intentions of Foreign Tourists Visiting Japan from Asia, Europe, America and Australia, FY2025 Reference Materials" by Development Bank of Japan (DBJ) and Japan Tourism Agency Foundation (JTBF)

[35] Compiled by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters, based on respective materials and sources listed below.
・Overseas expansion of content (overseas market size): Compiled based on Human Media Co., Ltd., "Japan and World Media × Content Market Database 2025" and overseas sales figures for the music sector surveyed by the Ministry of Economy, Trade and Industry.
・Consumption expenditure by inbound visitors (inbound tourism): Compiled based on the Japan Tourism Agency, "Survey on Consumption Trends of Inbound Visitors."
・Export value of agricultural, forestry, fishery and food products: Compiled by the Ministry of Agriculture, Forestry and Fisheries based on the Ministry of Finance, "Trade Statistics."
・Sales of overseas affiliates in the food manufacturing industry: Compiled based on the Ministry of Economy, Trade and Industry, "Basic Survey on Overseas Business Activities."
・Exports of textile goods and textile products: Ministry of Finance, "Trade Statistics."
・Overseas sales of major fashion manufacturers: Compiled based on the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters, "Empirical Survey on KGIs/KPIs Set by the Cabinet Office Toward FY2033."
・Exports of cosmetics: Compiled by the Japan Cosmetic Industry Association based on the Ministry of Finance, "Trade Statistics."
・Overseas sales of major cosmetics manufacturers: Compiled based on the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters, "Empirical Survey on KGIs/KPIs Set by the Cabinet Office Toward FY2033."
・Exchange rates are based on the IMF Exchange Rates Period Average: 1 USD = 140.49 JPY (2023), 151.37 JPY (2024), 149.66 JPY (2025).

Figure 38: Pro-Japan Sentiment, Intention to Visit Japan, Rate of Experience of Japan's Attractions, and Improvement in Pro-Japan Sentiment and Intention to Visit Japan through Experience

(Direction of measures)

<Collaboration with Content, and Linkage between Inbound Tourism and Exports>

① Virtuous Cycle of Content and Regional Revitalization Plan

In order to realize a virtuous cycle of regional economic revitalization through collaboration between the content industry and Cool Japan-related industries, efforts will be made to designate community-wide initiatives with large regional economic effects originating from content as "Content Regional Revitalization Bases," and other related measures. In doing so, concerned government ministries and agencies will strategically implement projects and promote collaboration across regions nationwide and with various content genres in order to further advance the designated bases.

In these efforts, from the perspective of intellectual property utilization, collaboration with content stakeholders, IP management utilizing regional resources, involvement of diverse regional stakeholders and awareness and penetration among local residents from the perspective of regional effectiveness and continuity of initiatives, formulation of basic policies and plans, and efforts toward high value-added activities and understanding of economic effects such as inbound consumption in the region from the perspective of regional economic revitalization will be promoted.

It is also important to analyze the actual state of experiential consumption and other activities of foreign tourists visiting the region, and to promote high value-added activities and regional branding utilizing content, as well as the use of early morning and nighttime hours, in order to achieve regional dispersion and expansion of tourism consumption. Furthermore, many of the landscapes depicted in works are close to the daily lives of residents, and in some cases the environment for receiving tourists is not in place. Taking into account the perspective of ensuring the quality of life of local residents, it is necessary to promote the development of an environment for receiving tourists suited to local conditions, including measures against violations of manners, installation of smart trash cans, reduction and leveling of congestion through entry restrictions and reservation systems, cashless payment, multilingualization, accurate information dissemination, and securing and improving secondary transportation.

Regarding collaboration between content and tourism, while promotions such as installation of monuments related to content, sales of merchandise, and train wrapping

are currently common, increasing the number of immersive and stay-type high value-added experiences through collaboration between content and regions utilizing digital technology is expected to have the effect of expanding consumption.

- Community-wide initiatives that leverage the appeal of content with large economic ripple effects on regional economies, such as attracting high value-added inbound visitors from overseas and developing human resources and creating businesses related to content in the region, will be designated as Content Regional Revitalization Bases at the Cool Japan Strategy Council, and their realization and expansion will be promoted through collaboration among concerned government ministries and agencies, local governments, and related business communities.

  (Short term and mid term) (CAO (IP), Agency for Cultural Affairs, Japan Tourism Agency, METI, and concerned government ministries)

- In order to further advance the Content Regional Revitalization Bases, community activities among the bases for sharing success stories and failure factors will be promoted.

  (Short term and mid term) (CAO (IP), and concerned government ministries)

- The initiatives of Content Regional Revitalization Bases will be analyzed in terms of collaboration with content stakeholders, regional implementation structures, and factors generating economic effects, and this information will be provided to regional stakeholders who may wish to engage in such initiatives in the future, thereby promoting efforts by regional stakeholders to collaborate with content stakeholders to disseminate the appeal of their regions.

  (Short term and mid term) (CAO (IP), Agency for Cultural Affairs, Japan Tourism Agency, and concerned government ministries)

- Regarding the initiatives of Content Regional Revitalization Bases, a framework for integrated information dissemination combining intellectual property utilization through collaboration between content stakeholders and regional stakeholders will be established, thereby promoting effective information dissemination that also takes into account the perspective of foreign tourists visiting Japan.

  (Short term and mid term) (CAO (IP), Japan Tourism Agency, Agency for Cultural Affairs)

- In order to advance content-driven regional revitalization, industry-academia-government initiatives in which educational institutions such as high schools and

vocational schools collaborate with companies and local governments will be supported.

(Short term and mid term) (Agency for Cultural Affairs)

- In order to maximize the great potential of local areas and the characteristics of each region, independent and creative regional initiatives by local governments will be supported, and efforts will be made to ensure that industrial cluster plans and growth strategies for local industries by local governments truly maximize local vitality.

(Short term and mid term) (Cabinet Secretariat (Regional Future Strategy Headquarters Secretariat))

- In order to facilitate and promote location filming and attraction, the handbook summarizing matters to be addressed by film commissions (FCs), licensing authorities, producers, and others will be disseminated, and mutual understanding among stakeholders will be deepened.

(Short term and mid term) (CAO (IP), National Police Agency, Fire and Disaster Management Agency, Immigration Services Agency, MLIT, and concerned government ministries)

- To effectively realize economic and social industrial promotion through location incentives, work on granting incentives and effective utilization to attract post production processes, including VFX. Consider support for the smooth filming of works eligible for incentives as well as promote the utilization of completed works in the filming locations.

(Short term and mid term) (METI, CAO (IP), and concerned government ministries)

- The creation of tourism content utilizing content such as anime, manga, films, and live-action works, effective information dissemination, and development of sales channels will be comprehensively supported, and efforts to supply tourism content such as location tourism and anime tourism will be promoted through public-private collaboration. In addition, the development of an environment for receiving tourists, including improvement of secondary transportation at tourist destinations, will be promoted.

(Short term and mid term) (Japan Tourism Agency, MLIT)

- The development of human resources in the field of media arts, which is highly regarded overseas, and the collection, preservation, exhibition, and utilization of related materials will be promoted. Efforts will be promoted through public-private collaboration toward the development of a hub with the functions of “National

Center for Media Arts”(tentative name) that has the following functions related to manga, animation, special effects, and game works, original drawings and other intermediate products, and related information: (1) collection, preservation, and digitization; (2) research; (3) human resource development and education; (4) domestic and international information dissemination; (5) exhibition and utilization; and (6) dissemination and exchange. In particular, regarding (5) and (6), after clarifying the specific form of the base, necessary measures will be taken toward its realization.

(Short term and mid term) (Agency for Cultural Affairs, METI, CAO (IP))

- Through Japan Cultural Expo[36], further utilization of anime, manga, and other content (including " a pilgrimage to a sacred place " in collaboration with Content Regional Revitalization Bases), provision of "special experiences" through new cross-domain combinations and initiatives utilizing nighttime, cooperation with international projects such as GREEN×EXPO 2027 (2027 International Horticultural Exposition), and other efforts, an increase in inbound visitors and expansion of consumption throughout Japan will be pursued.

(Short term and mid term) (Agency for Cultural Affairs, and concerned government ministries)

- Continue to approve plans based on the Act on Promotion of Cultural Tourism[37] and offer financial support for these plans, as well as raise awareness of measures and support initiatives that leverage the unique characteristics of each region to further revitalize Japan Heritage. Through these efforts, aim to further advance cultural tourism.

(Short term and mid term) (Agency for Cultural Affairs, Japan Tourism Agency)

- Expansion of inbound demand utilizing regional cultural and artistic resources will be promoted.

(Short term and mid term) (Agency for Cultural Affairs)

- Strengthen the functions of national parks and public facilities managed by the private sector to serve as centers for contemporary culture and information dissemination. Specifically, consider utilizing Kitanomaru Park as a center for disseminating information on cutting-edge science, arts, and culture.

(Short term and mid term) (Agency for Cultural Affairs,

[36] At the "Japan Cultural Expo Comprehensive Promotion Council" held on March 31, 2026, Prime Minister Takaichi outlined a policy to strengthen efforts contributing to inbound tourism attraction, inter-regional travel, and extended stays across Japan by strategically disseminating the appeal of cultural resources throughout the country both domestically and internationally, and by fundamentally enhancing overseas marketing that directly connects local regions with overseas markets.

[37] Act on Promotion of Cultural Tourism Centered on Core Facilities for Cultural Tourism in Regions (Act No. 18 of 2020)

MOE, and concerned government ministries)

- In order to encourage art initiatives and investment by companies and others, and to develop an environment in which funds are returned to artists and others, award programs for art initiatives by companies and others and enhancement of co-creation platforms will be advanced.

(Short term and mid term) (METI)

- The creation of tourism content utilizing regional resources such as "history," "nature," "food," and "culture," as well as appropriate development of sales channels and information dissemination, will be comprehensively supported, thereby further promoting efforts related to attracting visitors to local areas, including the development of high value-added inbound tourist destinations in local areas. In doing so, adventure tourism that allows visitors to deeply experience the essence of Japan through the elements of nature, culture, and activities, as well as ecotourism, infrastructure tourism, and other forms of tourism will be promoted, and tourism content will be refined and disseminated overseas to maximize the appeal of each region. Support for facility development that contributes to improving the quality of experiences and promoting travel within regions will also be promoted, thereby comprehensively strengthening the appeal of regions. Furthermore, continued support will be provided to businesses engaged in these initiatives, including new entrants and startups.

(Short term and mid term) (Japan Tourism Agency, MOE, Agency for Cultural Affairs, MLIT)

- Excellent regional revitalization initiatives and human resources that provide high value-added regional experiences utilizing anime, manga, films, live-action works, and other content through public-private and inter-ministerial collaboration will be recognized and introduced through awards, thereby promoting cross-industry collaboration.

(Short term and mid term) (CAO (IP), METI, Japan Tourism Agency, and concerned government ministries)

- Regulations and systems may become barriers when attempting to provide unprecedentedly high-value-added services. In Japan, various systems have been established as part of regulatory reform, including the Regulatory Reform Promotion Conference, the Special Zone System (including the Special Zone for National Strategic Projects), the Regulatory Sandbox System (New Technology Demonstration System), and the Gray Zone Elimination System. By encouraging greater awareness and utilization of these systems and contact points, promote

regulatory reform necessary for the provision of high-value-added services.

(Short term and mid term) (CAO (Regulatory Reform Promotion Office, Regional Revitalization Promotion Office), Cabinet Secretariat (Japan Growth Strategy Headquarters Secretariat), METI)

② Establishing Styles of Collaboration between Content and Food, etc.

Content such as anime and manga contributes to increasing favorable sentiment toward Japan and expanding the overseas expansion of other industries such as tourism and food, and the spread of diverse commercialization and experiential value creation in collaboration with content across various industries is expected to raise awareness among groups that were previously difficult to reach and expand consumption. In addition, initiatives[38] that develop into diverse food, beverage, cosmetics, and other products centered on specific technologies and resources are progressing, and further expansion is anticipated. Since deepening mutual understanding is important for cross-sector collaboration and expansion, public-private and inter-ministerial collaboration will be promoted to enable regions, businesses, and industries to work across boundaries.

- In order to promote various cross-sector collaborations including "content" and "food," efforts will be made to create opportunities for human resource exchange among members and to build human resource networks through the Cool Japan Public-Private Partnership Platform and other means.

  (Short term and mid term) (CAO (IP), and concerned government ministries)

- Overseas expansion and overseas dissemination initiatives involving collaboration among multiple industries and businesses, such as content × food, will be supported, and commendation programs and workshops will be implemented for the purpose of horizontally expanding excellent examples of such initiatives.

  (Short term and mid term) (MAFF, METI)

- Currency is the foundation of the economy, and collectors exist worldwide due to its historical value and rarity, with examples of diverse currency issuance for collectors seen in other countries. In Japan as well, in order to strengthen the function of disseminating Japan's appeal, which has been carried out through sales of coin sets including those for overseas markets, and to utilize it as a broad dissemination platform, necessary consideration will be advanced regarding the

[38] Fermenstation Co., Ltd. is advancing the multifaceted development of high value-added products, including food, beverages, and cosmetics, with fermentation technology at its core. https://fermenstation.co.jp/

issuance of collectible currency representing Japan's content and regional resources, while strengthening connections with collectors both domestically and internationally.

(Short term and mid term) (MOF)

- Specific initiatives will be considered and coordinated to organically link the overseas expansion of content and J-Beauty, thereby generating synergistic effects.

(Short term and mid term) (METI)

③ Linking Inbound Tourism Attraction and Export Promotion Initiatives

As consumption by foreign tourists visiting Japan in Cool Japan-related industries continues to increase year by year, strategic initiatives will be promoted to connect the experiences and consumption of foreign tourists visiting Japan to exports (continued purchases after returning home).

In order to connect inbound consumption to export expansion, cross-cutting initiatives and structures are needed, such as collaboration among departments engaged in export promotion, tourism departments including inbound tourism attraction, and promotion departments in each region.

Furthermore, attracting and receiving foreign tourists visiting Japan only at stores, factories, and other sites places a large economic and human burden on those sites, and the effect of expanding consumption through travel within regions may be limited. For this reason, it is important to develop community-wide initiatives including accommodation facilities and dining facilities, as well as mechanisms combining experiential consumption and accommodation, and at the same time to develop foreign tourists visiting Japan into fans of Japanese products overseas, thereby working to expand external demand through mutual collaboration between inbound tourism attraction and product export expansion initiatives. Collaboration among concerned government ministries, JETRO, JFOODO, JNTO, and other related organizations will be strengthened, and collaboration among related organizations will be promoted to effectively link pre-trip, during-trip, and post-trip initiatives in order to connect inbound consumption to the formation of fans of Japanese products and then to export expansion.

- Through the refinement of "SAVOR JAPAN" certified regions, which aim to attract foreign tourists visiting Japan with regional food and the agriculture, forestry, and fisheries industries that produce it, as well as integrated information dissemination, a virtuous cycle will be created that connects the expansion of food-related consumption through inbound tourism to regional revitalization and export

expansion.

(Short term and mid term) (MAFF)

- In order to increase the income of agricultural, mountain, and fishing villages and create a population with connections to these areas, the development of implementation structures for agricultural tourism regions, refinement of food and landscapes as tourism content, promotion both domestically and internationally, and development of accommodation facilities utilizing old private houses will be comprehensively supported. In addition, efforts by agricultural tourism regions to collaborate with organizations providing unique regional "food" will be supported to create high value-added content specializing in "food" with the aim of expanding food-related consumption through inbound tourism by those with an interest in Japan's food culture, thereby increasing the number of visitors to agricultural tourism regions and expanding consumption opportunities.

(Short term and mid term) (MAFF)

- Issues in effectively connecting Japanese agricultural, forestry, and fishery products popular with inbound tourists to exports will be identified, and support will be provided for model initiatives by businesses to address these issues.

(Short term and mid term) (MAFF)

- Initiatives will be promoted to apply knowledge gained from the experiential consumption and behavior of foreign tourists visiting Japan to product development for overseas consumers and improvement of effective proposal methods for buyers.

(Short term and mid term) (METI, MAFF, Japan Tourism Agency)

- In order to connect foreign tourists visiting Japan to continued purchasing activities after returning home, initiatives for connection to cross-border EC and fan formation will be promoted.

(Short term and mid term) (METI)

- Initiatives by local industry businesses handling traditional products and others for industrial tourism involving the entire community (open factories and regional travel plans) will be promoted.

(Short term and mid term) (METI, CAO (IP))

- Branding initiatives by sake businesses and initiatives related to overseas expansion and sake brewery tourism will be supported for product differentiation and high value-added activities, and GI dissemination and utilization, technical support, and other measures will be implemented.

(Short term and mid term) (National Tax Agency)

<Promotion experiential value and high-value-added development in response to global demands>

In terms of high value-added activities in tourism, it is necessary to appropriately implement initiatives in regions aimed at long-term stays, promotion of travel within regions, and quality improvement, such as enhancement of high value-added accommodation facilities, expansion of secondary transportation, information dissemination, and high value-added tourism content. In addition, throughout Japan there are regional resources with attractive backgrounds and stories related to history, nature, food, and culture, and it is important to devise initiatives that leverage these resources and pass them on to future generations. For this reason, initiatives for creating new value from regional resources will be promoted, including the development of accommodation, dining, and experiential facilities utilizing historical buildings, townscapes, and other regional resources as tourism resources, as well as the creation of tourism content.

As "sustainability" has become a common value across all fields globally, "sustainability" is becoming an important criterion for choosing travel destinations[39]. Japan has the potential to establish a strong international position by leveraging its strengths and potential in railway networks, walkable cities, seasonal ingredients, traditional crafts, and other areas to build a sustainable ecosystem that returns benefits to communities.

Furthermore, while various products and services based on traditional techniques in regions are internationally highly regarded individually for their high quality, unique aesthetic sensibility, and traditions, systematic dissemination has not been achieved, and their value has not been fully conveyed in the global market. For example, Japan's textile industry has unique Japanese strengths such as the finest craftsmanship using traditional and functional materials and contributions to SDGs, and is adopted by overseas luxury brands, but it has been pointed out that it has not been able to establish global branding as a single value system. For this reason, it is important to bundle the entire Japanese textile industry as a single "value system" and build international brand power based on Japan's strengths. In addition, from the perspective of enhancing the international competitiveness of final products and fostering Japanese luxury brands, specific initiatives such as integrated dissemination of fashion craftspeople and textiles need to be considered. Therefore, a structure for advancing all-Japan overseas

[39] According to the United Nations World Tourism Organization (UNWTO), sustainable tourism is defined as "tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities." https://unwto-ap.org/why/tourism-definition/

dissemination of Japanese textiles will be established, and specific consideration is needed toward strengthening the overseas expansion of Japan's fashion sector, with a view to holding an international textile trade fair in Japan by bringing together Japanese material exhibitions and fashion-related craftspeople held in a dispersed manner throughout Japan.

Innovation that actively incorporates external knowledge and technology is also important for connecting the inherent value to "creation of new value." In order to promote the use of technology and work toward both the succession of artisan techniques and the creation of new industrial value amid challenges such as labor shortages in Japan, support for small and medium-sized enterprises and startups, and development of an environment that facilitates new entry will be pursued, and initiatives utilizing new technologies will be promoted. In addition, in order to discover Japan's attractive content and effectively disseminate its appeal to the world, it is important to incorporate the perspectives of people overseas in addition to the perspectives of those engaged in various initiatives throughout Japan. For this reason, the development of an environment in which diverse human resources can engage, including the involvement of creative human resources active overseas and foreigners already engaged in various initiatives in Japan, will be promoted.

- Secure and train high-quality guides who can respond to the diverse needs of foreign visitors to Japan and appropriately convey Japan's attractiveness. In particular, support comprehensive and strategic initiatives to secure and train local guides in a sustainable manner, in line with regional characteristics, especially in regional areas. In addition, based on the findings of the expert committee on strategies and directions for the sustainable securing and development of local guide human resources in rural areas, initiatives for the stable supply of high-quality tourism content and local guide human resources in regions will be supported.

  (Short term and mid term) (Japan Tourism Agency)

- Toward the development of sustainable tourist destinations through resolution of issues faced by tourist destinations and the tourism industry, support will be provided for the introduction of digital tools that contribute to expanding sales channels for tourism content and improving productivity of the tourism industry at tourist destinations nationwide, and models for resolving issues in each region utilizing DX technology will be developed. In addition, measures against overtourism suited to the conditions of each region will continue to be supported.

(Short term and mid term) (Japan Tourism Agency)

- Attraction of international remote workers (so-called "digital nomads"), who represent "long-stay business inbound tourism," will be promoted based on their characteristics and needs, thereby promoting long-term stays in regions, increasing consumption, and creating business matching opportunities.

(Short term and mid term) (Japan Tourism Agency)

- In order to promote visits to Japan and attraction of high value-added travelers to local areas, support for domestic stakeholders and promotion through building connections with overseas high value-added traveler attraction networks will be developed in an integrated manner. Specifically, networking of domestic stakeholders involved in high value-added travel and collection and accumulation of service content, strengthening of sales to overseas travel agencies and information dissemination to consumers, and expansion of high value-added travel guides will be pursued.

(Short term and mid term) (Japan Tourism Agency)

- The creation of tourism content utilizing regional resources such as "history," "nature," "food," and "culture," as well as appropriate development of sales channels and information dissemination, will be comprehensively supported, thereby further promoting efforts related to attracting visitors to local areas, including the development of high value-added inbound tourist destinations in local areas. In doing so, adventure tourism that allows visitors to deeply experience the essence of Japan through the elements of nature, culture, and activities, as well as ecotourism, infrastructure tourism, and other forms of tourism will be promoted, and tourism content will be refined and disseminated overseas to maximize the appeal of each region. Support for facility development that contributes to improving the quality of experiences and promoting travel within regions will also be promoted, thereby comprehensively strengthening the appeal of regions. Furthermore, continued support will be provided to businesses engaged in these initiatives, including new entrants and startups.

(Short term and mid term) (Japan Tourism Agency, MOE, Agency for Cultural Affairs, MLIT) [Repeated]

- In order to realize a stress-free and comfortable travel environment, revolutionary immigration screening and customs inspection utilizing world-class technology will be realized through the introduction of "joint kiosks" that enable simultaneous acquisition of information necessary for immigration and customs procedures and the introduction of next-generation personal identification systems.

In addition, the waiting time for passengers will be reduced through the expansion of screening booths and facilities, effective placement of guidance and operation assistants, and development of CIQ systems (customs, immigration, and quarantine systems), with further improvement measures considered as necessary, through collaboration among concerned government ministries.

(Short term and mid term) (Immigration Services Agency, MOF, Japan Tourism Agency, and concerned government ministries)

- By expanding marine-related businesses nationwide that utilize the unique resources of fishing villages, such as highly fresh seafood, fishing experiences, and unique landscapes and history, aim to promote exchange and increase seafood consumption, while also securing regional income and employment opportunities.

(Short term and mid term) (MAFF)

- Aiming to enhance the appeal of stays in national parks, promote stay-type, high-value-added tourism centered on inspiring experiences in beautiful natural surroundings, advance the branding of national parks, and contribute to attracting visitors from Japan and abroad. Expand the National Park Enjoyment Project to national parks throughout Japan, and improve the reception environment by revitalizing and upgrading visitor facilities, promoting nature experiences, and improving sustainability. At the same time, encourage adventure travel and sustainable tourism, and disseminate information and promote the appeal of national parks in Japan and overseas using social media and digital technology. Furthermore, to accelerate decarbonization in harmony with the conservation of the natural environment, designate areas that are taking the lead in carbon neutrality as “Zero Carbon Parks” and provide support as necessary.

(Short term and mid term) (MOE)

- Through the implementation of "Food Treasures" commendation programs honoring the achievements of those who carry on food culture, surveys toward clarifying and adding value to food culture, support for research and other initiatives by local governments and others, and information dissemination that raises awareness of the cultural value of food culture, the preservation and utilization of Japan's attractive food culture will be pursued. In addition, in order to pass on Japan's traditional food culture to future generations, human resource development for passing on washoku culture to the next generation will be promoted, and the expansion of a database of traditional foods to promote the creation of added value for washoku will be pursued.

(Short term and mid term) (Agency for Cultural Affairs, MAFF)

- To address the risk of the loss or destruction of cultural properties, which are both the national treasures nurtured and preserved over the long history of our country and which attract people from both within and outside Japan while conveying the charm of our country and regions, appropriate measures such as designation under the Cultural Properties Protection Act will be implemented. Additionally, initiatives such as the creation of regional plans for the preservation and utilization of cultural properties will be promoted to enable the preservation and utilization of cultural properties through the collective efforts of the entire local community.

  (Short term and mid term) (Agency for Cultural Affairs)

- In order to develop accommodation facilities utilizing cultural properties, art museums, museums, and other cultural facilities that are expected to serve as high-quality facilities contributing to improving the satisfaction of foreign tourists visiting Japan with their experiences and accommodation stays, support will be provided for renovations to add high value to cultural properties, aesthetic improvement development, enhancement of utilization environments, and repairs and development premised on inbound use.

  (Short term and mid term) (Agency for Cultural Affairs)

- Traditional crafts have been nurtured within the history, culture, and natural environment of various regions across Japan. These crafts have enriched the lives of the Japanese people. Ongoing efforts will support these crafts by fostering the next generation of artisans in production areas, preserving techniques and methods, expanding demand, and promoting labeling initiatives. Additionally, support will be provided for cross-regional events and marketing surveys organized by the Traditional Crafts Industry Promotion Association, a general incorporated foundation, as well as for its certification program for traditional craftsmen. These efforts aim to promote the revitalization and development of the traditional crafts industry.

  (Short term and mid term) (METI)

- To strengthen the international competitiveness of the fashion industry, transform it into a sustainable business model and ecosystem, create added value through collaboration between creators and local cultural resources, thereby promoting global expansion and entry into digital markets.

  (Short term and mid term) (METI)

- Taking into account the fact that a design resource database serving as a foundation for utilizing design resources of Japanese industrial products and

fashion including kimono that shaped Japan's living culture preserved in domestic art museums and companies, which Japan can be proud of to the world, has begun to operate independently in the private sector, consideration of the future form of archiving and utilization of design resources will be supported.

(Short term and mid term) (METI)

- Toward the internationalization and revitalization of Japan's art market and art scene, the development of an environment and structure for capturing customers from overseas markets centered on high value-added segments will be advanced through the implementation of a new Japan-originated art platform in collaboration with internationally influential art fairs and other means. In addition, initiatives related to international dissemination of art at international events will be carried out.

(Short term and mid term) (Agency for Cultural Affairs)

- The development of foundations such as a price evaluation business certification system aimed at improving the reliability of art price evaluation will be advanced.

(Short term and mid term) (Agency for Cultural Affairs)

- Through the commendation of excellent examples of high value-added activities that work to discover and refine regional appeal, the strengthening of regional brands and horizontal expansion nationwide will be promoted.

(Short term and mid term) (CAO (IP))

- Initiatives that have achieved enhancement of appeal value, strengthening of dissemination capabilities, or DX utilizing new technologies including NFT (Non-Fungible Token) will be investigated, and success factors will be extracted and shared.

(Short term and mid term) (CAO (IP), and concerned government ministries)

- Through the Cool Japan Public-Private Partnership Platform and other means, efforts will be promoted toward bundling or linking various regional attractions such as traditional crafts and food to build them as a new Japanese value system, and toward collaboration with government-related organizations such as JETRO and JNTO, overseas buyers targeting wealthy individuals, and travel designers.

(Short term and mid term) (CAO (IP), and concerned government ministries)

- In addition to supporting SMEs in promoting high-value-added development through the creation of innovative products and services and fostering start-ups, develop an environment that facilitates the entry of new businesses. Also, promote initiatives that utilize new technologies such as blockchain/Web 3.0, NFT, AI, metaverse, and VR.

(Short term and mid term) (METI, CAO (IP), and concerned government ministries)

- Taking into account the fact that innovation-driven initiatives are being carried out in the overseas expansion of agricultural, forestry, and fishery products and other items, efforts will be made to develop markets in countries and regions where overseas expansion has previously been difficult, and to disseminate Japanese food and food culture to countries and regions that are promising as export destinations and dissemination destinations for Japanese food.

(Short term and mid term) (MAFF)

<Building Global Supply Chains>

① Brand Strategy and Localization

Overseas expansion initiatives will be advanced with emphasis on a market perspective focused on what is truly sought from the world. In doing so, it is important to develop new demand through branding that appeals to values backed by global evaluation such as the spread of a global orientation toward solving social issues, growing health consciousness, Japanese content, traditional techniques, and UNESCO Intangible Cultural Heritage registration, as well as collaboration with peripheral industries.

When branding for overseas expansion, it is necessary to clearly define targets and develop marketing strategies that take into account the cultures and values that differ by country and region, as well as brand dissemination utilizing digital tools such as SNS.

Overseas, as commercial flows from information dissemination through SNS utilizing influencers to EC are expanding, it has been pointed out that SNS utilization has not advanced in Japan. In particular, regarding the use of influencers, it is said that companies are overly sensitive to the risk of brand damage due to flaming risks and reputation decline, and are using influencers while suppressing risks and maintaining trust. Since posts by influencers are followed by viewers interested in the same topics, and through two-way interaction on SNS, engagement beyond mere viewing can be enhanced, avoiding this as a "risk" itself can become a risk in advancing medium- to long-term overseas expansion. For this reason, SNS should be positioned as a core channel for realizing "SNS → purchase" and incorporated into marketing strategies.

In addition, based on marketing thinking, it is important to conduct price appeals and localization that take into account the culture, customs, and lifestyle of the target country or region so that products and services are accepted there, and to build trust relationships with local consumers through promotional activities to raise awareness. For this reason, companies aiming for overseas expansion, including small and medium-

sized enterprises, are required to understand the markets of the countries and regions in which they expand. In order to deeply understand local cultures and customs, it is possible to refine products and services by actively utilizing collaboration with Japan-fan foreigners and the purchasing behavior and feedback of overseas consumers such as foreign tourists visiting Japan.

Furthermore, since there is also a risk of counterfeit and imitation products appearing in the wake of growing global recognition, brand strategies to enhance brand credibility are also important. In doing so, the perspective of a "virtuous cycle of intellectual property" that leads not just to protection but to monetization and reinvestment is important. For example, superior varieties are the source of Japan's agricultural strengths, and it is necessary to promote strategic overseas licensing initiatives. For this reason, from the perspective of expanding exports, overseas expansion, and inbound consumption, regarding agricultural, forestry, and fishery products and other items, as described in the <Agriculture, Forestry, Fisheries, and Food Industries> section of the (Current Status and Issues) in III.2.(4), initiatives will be promoted such as the development of an environment in which intellectual property protection systems related to agricultural, forestry, and fishery products (breeder's rights, GI, trademarks, patents, etc.) can be understood and utilized, strengthening of countermeasures against counterfeits of Japanese brands, and human resource development to enable the use of intellectual property as a "management tool."

Regarding items other than agricultural, forestry, and fishery products, in the EU, from December 1, 2025, the scope of GI protection has been expanded to include handicrafts and industrial products. As described in the <Small and Medium-sized Enterprises and Mid-tier Enterprises> section of the (Current Status and Issues) in III.2.(4), from the perspective of strengthening the protection of regional brands, it is necessary to advance the organization of relationships with GI, trademarks, the traditional craft designation system, and other systems, and to consider effective measures for protecting valuable products and services originating from regions, from traditional to innovative.

- To develop the brand value that contributes to changes in values and lifestyles, such as solving global social issues and increasing health consciousness, rather than simply selling goods, and work to cultivate new markets and expand existing markets. In particular, in the export of agricultural, forestry, and fishery products and the overseas expansion of food and food culture, efforts will be made to establish standards, create and utilize innovation, and strengthen branding through GI to leverage strengths such as high quality.

(Short term and mid term) (MAFF, National Tax Agency, and concerned government ministries)

- Local JETRO offices will support Japanese companies in responding to regulations in overseas expansion by preparing and publishing regulatory information including licensing and other requirements.

(Short term and mid term) (METI, MAFF, National Tax Agency, and concerned government ministries)

- In cooperation with concerned government ministries such as the Japan Tourism Agency and other stakeholders, promote GI products that have quality, tradition, and stories derived from the natural environment, culture, and customs unique to their region, and utilize them as regional tourism resources while publicizing them widely.

(Short term and mid term) (MAFF, National Tax Agency, and concerned government ministries)

- Based on the "Export Expansion Action Strategy for Agricultural, Forestry, Fishery Products and Food," and with the tailwind of the UNESCO Intangible Cultural Heritage registration of "Traditional Sake Brewing," efforts will be actively made to further expand exports of Japanese sake, including raising awareness through international promotions and dissemination of appeal to inbound visitors, and supporting overseas sales channel development by sake businesses. In addition, branding initiatives by sake businesses and initiatives related to overseas expansion and sake brewery tourism will be supported for product differentiation and high value-added activities, and GI dissemination and utilization, technical support, and other measures will be implemented.

(Short term and mid term) (National Tax Agency)

- Advanced examples in Cool Japan-related industries will be discovered, and information that provides suggestions for creating new value through horizontal expansion across regions and sectors will be disseminated. In addition, opportunities for information sharing and exchange of opinions on success factors and other aspects of initiatives will be established for companies and experts interested in overseas expansion of Cool Japan-related industries, and initiatives will be implemented that lead to business expansion and creation of collaboration opportunities for Cool Japan stakeholders.

(Short term and mid term) (CAO (IP), and concerned government ministries)

- To prevent the distribution of counterfeit Japanese agricultural, forestry and fishery products and food products overseas, measures against unauthorized use

will be implemented through the promotion of mutual protection of GI with foreign countries, investigation of overseas markets and EC sites, and operation of a consultation service for information on suspected counterfeit products.

(Short term and mid term) (MAFF, MOFA, JPO) [Repeated]

- Taking into account the fact that handicrafts and other items are subject to GI in the EU, the EU's trends will continue to be monitored, and the feasibility of introducing such a system in Japan will be considered.

(Short term and mid term) (METI, MOFA) [Repeated]

- Amid evolving societal values, SDGs and ESG investment are becoming increasingly important. Cool Japan Fund Inc. (Cool Japan Organization) will work to develop overseas demand by clearly recognizing Japan's strengths in areas such as disaster, the super-aging society, and the recycling-oriented economy, which are among the various social issues facing the world in the future.

(Short term and mid term) (METI)

- Amid concerns about declining demand in local areas, the creation of added value utilizing regional resources and the development of sales channels particularly for overseas markets will be strongly supported, thereby contributing to the realization of a strong local economy that leverages the great "potential" of local areas.

(Short term and mid term) (CAO (Regional Revitalization Promotion Office))

② Building Global Supply Chains

Until now, Japan's main business model has been to export domestically-oriented products to countries where they can be exported, and there have been cases where market development and expansion have been difficult, for example, with sales channels limited to some Japanese and Asian retailers, because the products do not meet the needs (quantity, price, quality, etc.) of local consumers. In order to expand exports, product development based on specifications suited to global market requirements, a continuous supply system, understanding of consumer needs and regulations by country and region, and local business partners are needed, making it important to build supply chains connecting production to local wholesalers and stores. It is difficult for individual companies to handle all of these, and it is required that the entire industry, across industries, or businesses constituting the supply chain work together to advance product development, production system development, and distribution sophistication with an eye on overseas markets.

In competition in global markets, it is important to work to ensure "equal footing

(competition on equal terms)" with regulations in other countries, and to actively work toward establishing international rules favorable to Japan.

The involvement of support organizations with knowledge and networks related to overseas markets is indispensable, and the role of JETRO, which handles consultation on import and export procedures, cross-border EC and digital marketing support, participation in overseas trade fairs, business meetings both domestically and internationally, and development of local partners, is becoming increasingly important.

In recent years, the movement to directly reach and sell to consumers via SNS has expanded rapidly, making it increasingly difficult to rely solely on overseas expansion through BtoB-centered business models. The perspective of raising awareness, understanding, and empathy among end consumers and creating needs overseas is becoming important. For this reason, strengthening of initiatives to build relationships with consumers through brand understanding and to stimulate needs through collection of consumer voices on SNS, formation of fan communities, utilization of cross-border EC and local pop-up events, and experiential measures such as workshops is required.

- The use of cross-border EC and SNS as marketing tools to convey brand and product value, and continued appeals to overseas consumers and others through fan communities will be promoted.

  (Short term and mid term) (METI, MAFF, Japan Tourism Agency)
- In order to build a strategic supply chain integrated from production to local sales, support will be provided for initiatives by consortiums consisting of domestic production businesses, overseas sales businesses, and trading companies connecting the two.

  (Short term and mid term) (MAFF, concerned government ministries)
- Under the "Support Program for 10,000 Japanese Food Exporters" established to expand exports of attractive Japanese agricultural, forestry, and fishery products and food, concerned government ministries and organizations will collaborate to strengthen the structure of support organizations including JETRO, thereby advancing demand development through strengthened sales to overseas local commercial channels, expansion of the base of export businesses, and high value-added activities for export products, and supporting businesses through to the realization of exports.

  (Short term and mid term) (METI, MAFF)
- The interim report of the Cosmetics Industry Competitiveness Enhancement

Study Group[40] has set an industry target of increasing the combined total of export value and local production and sales value (limited to Japanese brands) to 2 trillion yen by 2033, and advice will be provided toward the concretization of private sector collaborative initiatives toward achieving this target.

(Short term and mid term) (METI)

- The initiatives of other countries that have a significant presence in the global cosmetics market, specifically the public-private collaborative initiatives of K-Beauty in Korea and the activities of private organizations in France and the United States, will be investigated and analyzed to extract highly effective methods for reference in Japan's initiatives, and response policies will be considered domestically.

(Short term and mid term) (METI)

- Cross-industry export support measures by JETRO and others will be widely disseminated to related domestic companies and others through seminars and other means by cosmetics-related companies and others.

(Short term and mid term) (METI)

- In order to promote responses by domestic cosmetics-related companies to cosmetics regulations in other countries, support will be provided for research and development contributing to the construction and operation of an integrated database, including the construction of advanced and efficient systems.

(Short term and mid term) (METI)

- Regarding regulations on cosmetics based on the Act on Securing Quality, Efficacy and Safety of Products Including Pharmaceuticals and Medical Devices, overseas regulatory conditions will be investigated, and regulations on labeling that can appeal to consumers, including the use of numerical data and usage testimonials in advertising and the form of efficacy claims, will be reviewed as necessary taking into account international consistency. In addition, concerned government ministries, industry associations, and others will closely collaborate to consider the establishment of international rules on cosmetics that are favorable to Japan.

(Short term and mid term) (MHLW, METI)

- From the perspective of promoting overseas expansion of cosmetics and strengthening international competitiveness, in order to enhance the brand value of the J-Beauty industry as a whole, the government as a whole will support the

[40] Study Group on Strengthening the Competitiveness of the Cosmetics Industry (Chairperson: Motoi Ihara, Dean, Faculty of Economics, Saitama University)
https://www.meti.go.jp/shingikai/mono_info_service/cosmetic_industry/index.html

initiatives of a consortium newly established under private sector leadership through collaboration among related industries.

(Short term and mid term) (CAO (IP), METI, and concerned government ministries)

<Response to International Political and Economic Climate Risks>

Regarding exports of agricultural, forestry, and fishery products and other items, in response to cases of import restrictions overseas associated with the accident at Tokyo Electric Power Company's Fukushima Daiichi Nuclear Power Station and the release of ALPS-treated water into the ocean, efforts will be made to correct misinformation and call for the immediate lifting of import restriction measures not based on scientific evidence. In addition, when advancing overseas expansion of various industries including agricultural, forestry, and fishery products, in order to avoid risks from excessive concentration of exports in specific countries and regions, efforts will be made to diversify export destinations and develop new markets, not just countries and regions with currently large export volumes, while taking into account market needs. Regarding inbound tourism as well, taking into account international political and economic conditions, efforts will be made to diversify and disperse markets and develop new markets in order to build a portfolio consisting of various countries and regions as sources of outbound travelers.

Furthermore, international regulatory trends and other developments will be monitored and appropriately addressed, as in the case where new EU regulations on food packaging nearly made sake exports difficult[41].

- In order to avoid excessive dependence on some countries and regions for export destinations of agricultural, forestry, and fishery products and other items and for sources of inbound tourists, overseas market needs will be appropriately understood, export destinations will be diversified, and new markets will be developed. At the same time, strategic inbound promotion will be deployed to further support the trend toward diversification of inbound markets in order to promote visits to Japan from various countries and regions toward the realization of sustainable tourism.

  (Short term and mid term) (MAFF, National Tax Agency, Japan Tourism Agency)

- Local JETRO offices will support Japanese companies in responding to regulations in overseas expansion by preparing and publishing regulatory information including licensing and other requirements.

[41] Within the EU, regulations are to be introduced requiring businesses that manufacture and sell food products to recycle or reuse a certain proportion of their containers starting in 2030. As a result of the Japanese Government's engagement with EU authorities, sake bottles have been excluded from the reuse obligations.

(Short term and mid term) (METI, MAFF, National Tax Agency, and concerned government ministries) [Repeated]

<Strengthening Overseas Dissemination Capabilities toward Expanding Japan Fans>

In various initiatives by overseas diplomatic missions, the Japan Foundation, JNTO, JETRO, and other concerned government ministries and private sector entities, concerned government ministries and the public and private sectors will collaborate to promote integrated dissemination of Japan's appeal transcending sectoral and regional boundaries.

In dissemination, it is necessary to devise approaches that take into account target setting, organization of information that "gets through" in global markets, and differences in the preferences, values, and expressions of foreigners.

Currently, many foreign nationals are present in Japan, including foreign tourists visiting Japan, foreign youth employed to enrich local international exchange and foreign language education, and international students, and they contribute to promoting understanding of Japan as Japan fans. Opportunities for matching[42] with regions and others seeking collaboration with foreigners in initiatives to discover, refine, and disseminate Japan's appeal are also important. In addition, since communities of Japan fans formed on SNS have become one of the entry points for exports and inbound tourism attraction, active collaboration with and utilization of such communities of Japan-fan foreigners and foreign influencers will be promoted[43].

Since foreign tourists visiting Japan may disseminate information on SNS and other platforms when they obtain high satisfaction from experiencing Japan's appeal, initiatives to create experiential value and high value-added activities from regional appeal are also important from the perspective of strengthening overseas dissemination.

- Regarding the dissemination of Japan's appeal through overseas diplomatic missions, Japan House, and the Japan Foundation, appropriate promotional projects and cultural projects including lectures, performances, exhibitions, and screenings on a wide range of topics in collaboration with concerned government ministries and related organizations will be implemented in response to the needs of each country and region, utilizing online means as well, and strategic public

[42] The Council for Local Authorities for International Relations (CLAIR) holds an annual joint company information session with the aim of providing a matching opportunity for both domestic companies and organizations seeking global human resources and JET Programme participants who have developed an international perspective, in response to the needs of both parties. https://jetprogramme.org/ja/careersupport/careerfair/

[43] North American Sake Fan Community Project (JETRO) https://www.jetro.go.jp/ext_images/_News/releases/2025/6e0213b5686091a7/01.pdf

relations and cultural activities will be developed.

(Short term and mid term) (MOFA, CAO (IP), and concerned government ministries)

- The dissemination capabilities of Japan House will be further utilized and strengthened. In doing so, attention will be paid not only to dissemination but also to securing commercial distribution and other aspects so that dissemination at Japan House leads to business.

(Short term and mid term) (MOFA, CAO (IP), and concerned government ministries)

- Regarding dissemination by concerned government ministries and related organizations, collaboration will be pursued including dissemination through SNS, and dissemination capabilities will be further enhanced by leveraging the knowledge and resources of each organization, while strengthening information dissemination through the government's international public relations.

(Short term and mid term) (CAO (Government Public Relations), and concerned government ministries)

- To ensure effective information dissemination, collect and analyze information on overseas promotion activities by concerned government ministries and agencies to promote the appeal of Japan's Cool Japan-related industries. Based on this information, actively implement comprehensive promotion activities by concerned government ministries and agencies.

(Short term and mid term) (CAO (IP), MIC, MOFA, National Tax Agency, Agency for Cultural Affairs, MAFF, METI, Japan Tourism Agency, and concerned government ministries)

- With the aim of increasing exports of agricultural, forestry, and fishery products, in addition to promoting individual items, the appeal of Japanese food and food culture as a whole will be promoted, and promotions will be conducted in conjunction with food-related goods such as tableware and chopsticks to raise awareness and promote the growth of Japanese food and food culture overseas.

(Short term and mid term) (MAFF, National Tax Agency, and concerned government ministries)

- Regarding “Japan’s Traditional Brewing,” which was registered as UNESCO’s Intangible Cultural Heritage in December 2024, engage in various outreach and awareness activities, such as holding symposiums, to pass on techniques to the next generation and raise global awareness.

(Short term and mid term) (National Tax Agency)

- Overseas expansion and overseas dissemination initiatives involving collaboration among multiple industries and businesses, such as content × food, will be supported, and commendation programs and workshops will be implemented for the purpose of horizontally expanding excellent examples of such initiatives.

(Short term and mid term) (MAFF, METI) [Repeated]

- Currency is the foundation of the economy, and collectors exist worldwide due to its historical value and rarity, with examples of diverse currency issuance for collectors seen in other countries. In Japan as well, in order to strengthen the function of disseminating Japan's appeal, which has been carried out through sales of coin sets including those for overseas markets, and to utilize it as a broad dissemination platform, necessary consideration will be advanced regarding the issuance of collectible currency representing Japan's content and regional resources, while strengthening connections with collectors both domestically and internationally.

(Short term and mid term) (MOF) [Repeated]

- Taking the 100th anniversary of the Showa era as an opportunity, promote events related to Showa culture, including songs, manga, anime, movies, and publications.

(Short term) (Cabinet Secretariat "Showa 100th Anniversary" Policy Promotion Office), concerned government ministries and agencies)

- Since Japan fans may sometimes expand their interests and connect to business through various co-creation opportunities triggered by visiting Japan, issues faced by foreign entrepreneurs and international students in Japan in becoming active in Japan will be identified with a view to creating such opportunities, and efforts will be made to develop the environment.

(Short term and mid term) (MEXT, MLIT, and concerned government ministries)

- The acceptance of international students has significance in terms of promoting mutual understanding and friendly relations with other countries and playing a role in actively disseminating Japan's various attractions overseas. For this reason, while placing even greater emphasis on the perspective of improving quality through thorough enrollment management and security trade management rather than prioritizing quantity, excellent international students from diverse countries and regions will be accepted, and the internationalization of universities will be promoted, including the development of environments in which Japanese and international students learn together and the strengthening of inter-university

exchanges with quality assurance.

(Short term and mid term) (MEXT)

- Strategic and effective overseas dissemination in collaboration with Japan fan communities formed around the world, foreign influencers, or domestic and overseas media will be promoted.

(Short term and mid term) (CAO (IP), and concerned government ministries)

- To deepen cooperation with Cool Japan Fund Inc. (Cool Japan Organization) and related ministries, agencies, and organizations, utilize the Cool Japan Public Private Partnership Platform to provide information on global perspectives and new initiatives to the Cool Japan Organization, as well as share information and support cooperation with members participating in the platform regarding projects already invested in by the Cool Japan Organization.

(Short term and mid term) (METI, CAO (IP))

- GREEN×EXPO 2027 (2027 International Horticultural Exposition), with flowers, greenery, and agriculture as its starting points, can serve as an opportunity to disseminate domestically and internationally the initiatives of Cool Japan-related fields such as tourism, food, and culture through exhibitions and events featuring Japan's view of nature, horticultural and landscape gardening culture, and environmental, agricultural, and food technology. Therefore, not only concerned government ministries but also the public and private sectors will collaborate to carry out initiatives that contribute to disseminating Japan's appeal, including before and after the exposition period and inside and outside the exposition venue.

(Short term and mid term) (MLIT, MAFF, National Tax Agency, MEXT, Japan Tourism Agency, and concerned government ministries)

（2） Promotion of Content Strategy

(Current Status and Challenges)

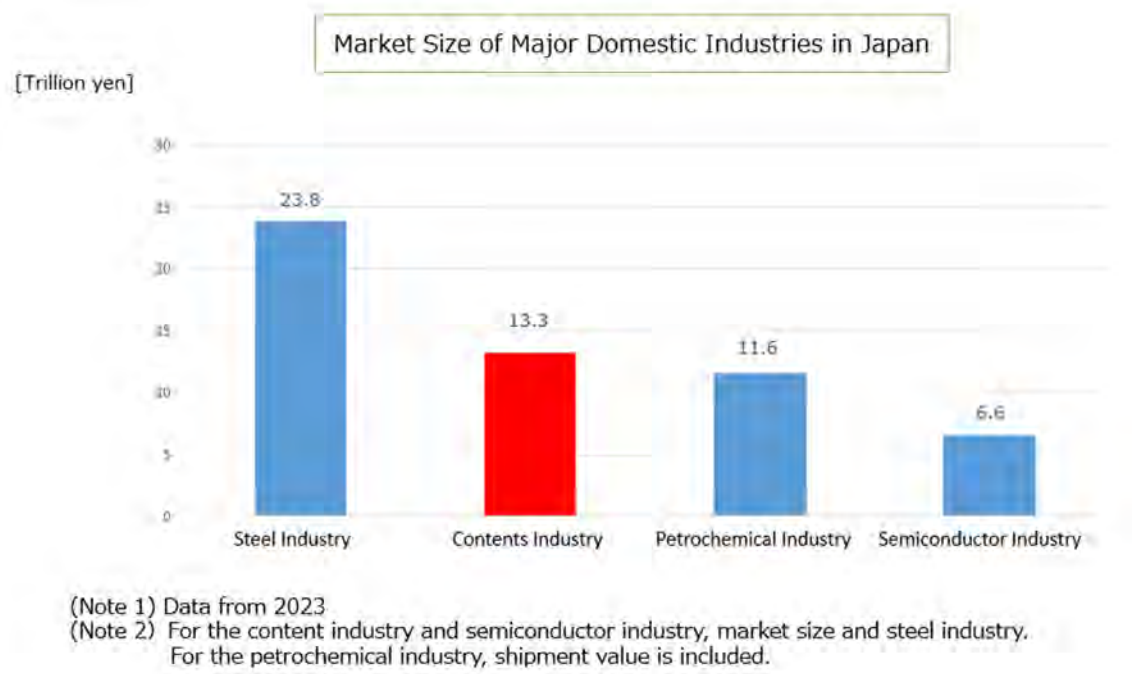
The market size of Japan's content industry stands at 13.3 trillion yen (2023), comparable to the petrochemical industry and larger than the semiconductor industry. The overseas market size of Japanese content is 6.1 trillion yen (2024), surpassing the export values of the steel and semiconductor industries. In particular, of the 6.1 trillion yen (2024), games account for 3.4 trillion yen, representing more than half of the total, and are expected to continue to lead the overseas expansion of the content market.

The global content industry market size[44], when viewed in yen terms, grew

[44] The global market figures were calculated by aggregating the content market sizes of Japan, the United States, China, Germany, the United Kingdom, France, South Korea, and India, based on the "Japan and Global Media × Content Market Database (2025)" published by Human Media Co., Ltd.

significantly by 87.5% from 2020 to 2024, while the growth of Japan's domestic content industry market size was limited to 12.7% over the same period. When viewed in dollar terms, the continued depreciation of the yen since 2020 has had an impact, with the global content industry market size growing by 32.2% from 2020 to 2024, while Japan's content industry market size showed a negative growth over the same period.

As Japan's domestic population is expected to decline in the future, it is important for Japan to capture the continuously expanding global content industry market. Meanwhile, while Japan's overseas content market size has increased by 34.8% in yen terms from 2020 to 2024, the growth from 2023 to 2024 was limited to 6.1%. From the perspective of achieving the target of expanding the overseas market size to 20 trillion yen by 2033, even greater growth is expected going forward.

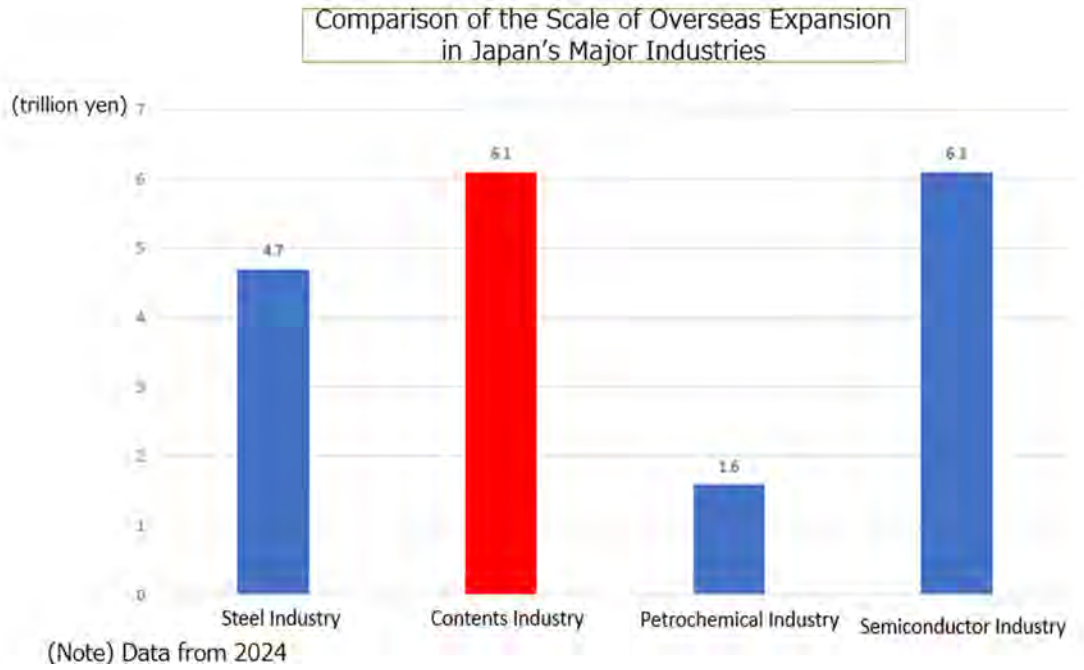


(Source) Prepared by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters based on various materials.

Figure 39: Market Size of Major Domestic Industries in Japan[45][46]

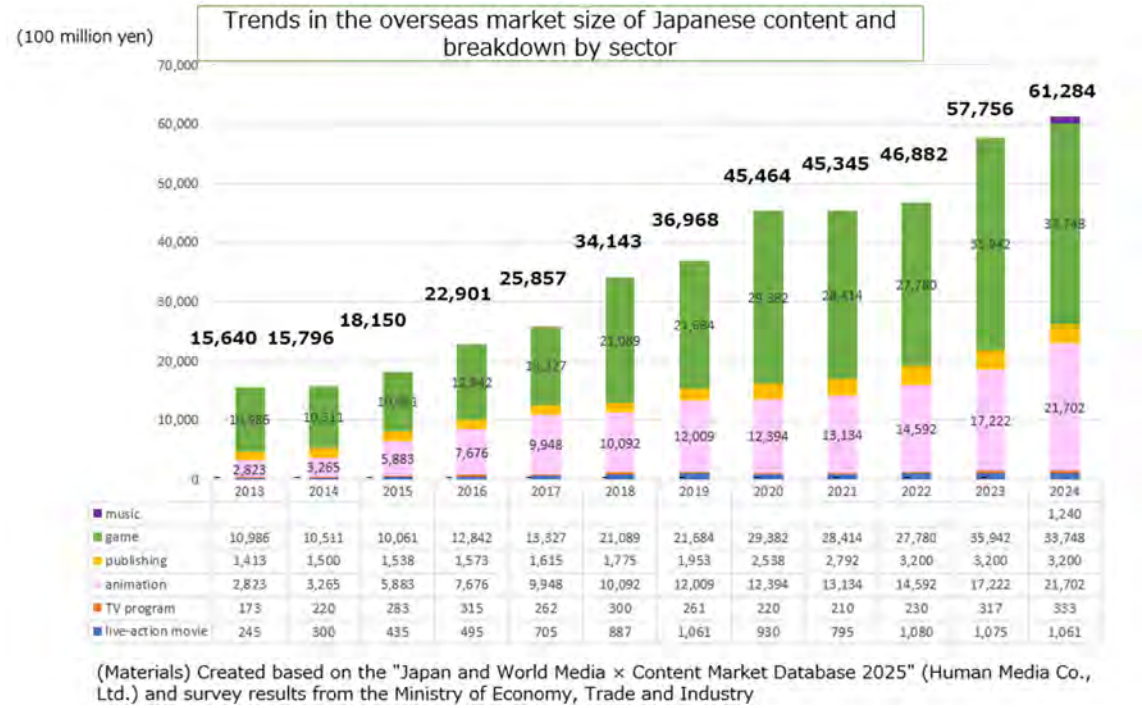
[45] Source for Figure 39: Steel industry export value: Japan Iron and Steel Federation, Overview of Steel Export and Import Performance (https://www.jisf.or.jp/data/boeki/index.html); Content industry export value: Human Media Co., Ltd., "Japan and World Media × Content Market Database 2024" and survey by the Ministry of Economy, Trade and Industry (overseas market sales); Petrochemical industry exports: interviews with the Japan Petrochemical Industry Association (export value of petrochemical products by country); Semiconductor industry exports: Ministry of Finance Trade Statistics (semiconductor and other electronic components).

[46] For the sources of Figure 40: Steel industry: Ministry of Economy, Trade and Industry, 2024, "Economic Census for Business Activity (Survey on Manufacturing Establishments)" (https://www.meti.go.jp/statistics//tyo/kkj/seizo_result.html), Content industry: Human Media Co., Ltd., "Japan and World Media × Content Market Database 2024", Petrochemical industry: Ministry of Economy, Trade and Industry, 2024, "Economic Census for Business Activity (Survey on Manufacturing Establishments)" (https://www.meti.go.jp/statistics//tyo/kkj/seizo_result.html), Semiconductor industry: WSTS, World Semiconductor Trade Statistics (https://www.jeita.or.jp/japanese/stat/wsts/docs/20241203WSTS.pdf)



(Source) Prepared by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters based on various materials.

Figure 40: Comparison of the Scale of Overseas Expansion in Japan's Major Industries



	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
music												1,240
game	10,986	10,511	10,061	12,842	13,327	21,089	21,684	29,382	28,414	27,780	35,942	33,748
publishing	1,413	1,500	1,538	1,573	1,615	1,775	1,953	2,538	2,792	3,200	3,200	3,200
animation	2,823	3,265	5,883	7,676	9,948	10,092	12,009	12,394	13,134	14,592	17,222	21,702
TV program	173	220	283	315	262	300	261	220	210	230	317	333
live-action movie	245	300	435	495	705	887	1,061	930	795	1,080	1,075	1,061

(Source) As noted in the figures.

Figure 41: Trends in the overseas market size of Japanese content and breakdown by sector

The Government decided at a Cabinet meeting in June 2025 the "Grand Design and Action Plan for a New Form of Capitalism, 2025 Revised Version," setting a target to expand the overseas market size of Japan-originated content to 20 trillion yen by 2033, and established three pillars: (1) strengthening the command and control functions related to creators and the content industry; (2) promoting overseas expansion and the production and distribution of content that can compete globally; and (3) developing an environment in which creators can work with peace of mind on a sustainable basis.

Regarding the growth strategy of the Takaichi Cabinet, at the 1st Headquarters for Japan's Growth Strategy meeting held in November 2025, 17 strategic fields for crisis management investment and growth investment, including content, were identified. Through deliberations at the Content Industry Public-Private Council held from January 2026 onward, a draft roadmap was presented in April 2026, and work is underway to finalize the roadmap, which will clarify the content, scale, and timing of domestic investment, toward the formulation of the Japan’s Growth Strategy this summer. In developing the roadmap, coordination has been progressing with the Ministry of Economy, Trade and Industry's Entertainment and Creative Industry Policy Study Group, which presented and discussed the "Draft Outline of the Revised Entertainment and Creative Industry Strategy" in March 2026, and the Public-Private Council for Strengthening the Capacity to Expand Live-Action Content, established by the Ministry of Internal Affairs and Communications in January 2026, which formulated the "Action Plan for Strengthening the Capacity to Expand Live-Action Content" in April 2026, to advance the examination of public-private investment policies. Furthermore, in November 2025, the Cabinet Office launched the Creator and Content Stakeholder Support Portal to consolidate and strengthen content-related measures and to centralize information dissemination and consultation services.

Regarding the strengthening of content production, distribution, and overseas expansion, the supplementary budget for FY2025, enacted in November 2025, allocated a total of more than 55 billion yen in supplementary budget, including multi-year measures through a fund (approximately 58.9 billion yen including the FY2026 initial budget). For example, the Ministry of Economy, Trade and Industry's Content Industry Growth Investment Support Project includes support for the production of large-scale works and overseas expansion support, while the Agency for Cultural Affairs' Creator Development Support includes projects related to the development and securing of core specialized human resources that support content production and dissemination, and implementation of these projects is underway.

Regarding the development of an environment in which creators can work with peace

of mind, the Japan Fair Trade Commission published in December 2024 the results of a fact-finding survey on transactions between performers and talent agencies in the fields of music and broadcast programs. Based on the results of this survey, in September 2025, guidelines clarifying specific approaches in light of the Act on Prohibition of Private Monopolization and Maintenance of Fair Trade and other relevant laws were published jointly with the Cabinet Secretariat regarding the appropriate conduct of transactions between performers and talent agencies, broadcasting operators, and record companies. Furthermore, in December 2025, the results of a fact-finding survey on the trading environment for creators in the production sites of films and animation were published, and work is underway to formulate guidelines that clarify specific approaches in light of the Act on Prohibition of Private Monopolization and Maintenance of Fair Trade and other relevant laws based on the results of this survey. In addition, the Act on the Proper Treatment of Specified Business Operators and Optimization of Transactions between Business Operators (Freelance Act) came into force in November 2024, and it is important to promote compliance with this Act and to develop an environment in the content industry in which creators can work with peace of mind on a sustainable basis. Furthermore, the Act on Promotion of Competition for Specified Software Used on Smartphones came into force in December 2025, and developing a fair and free competitive environment through the operation of this Act is also important for activating innovation in the content industry.

<Steady Promotion of the Content Sector Public-Private Investment Roadmap>

In April 2026, based on deliberations at the Content Industry Public-Private Council, a draft "Public-Private Investment Roadmap" for the content sector was presented, showing a multifaceted and strategic set of supply-side strengthening measures by the Government.

This roadmap covers the major content sectors of games, animation, manga, music, and live-action (referring to film and broadcasting), and is based on the perspective of realizing autonomous and continuous growth by companies by drawing out private investment through bold policy packages. Under "responsible and proactive fiscal policy," it commits to deploying policy resources, and involves the public and private sectors working together to set the markets to be captured and strategic targets, make investment commitments, and identify and share the "path to success."

In addition, the policy package places emphasis on the creation and formation of demand and markets and the social implementation of new technologies, taking into account the stage of business development. For example, in the games sector, it is

indicated that competitiveness in the global market including mobile and PC will be strengthened through improving the profitability of existing world-class intellectual property (IP), creating new IP using those profits as a source of funding, and developing a development infrastructure utilizing advanced technologies such as AI and XR. In the animation sector, it is indicated that, building on the high recognition of Japanese animation overseas, the distribution network will be strengthened through the promotion of large-scale work production and the international expansion of Japanese streaming platforms, and IP reinvestment will be promoted through improving the profit-sharing rate for production companies. Furthermore, in the manga sector, it is indicated that legitimate distribution will be expanded by strengthening anti-piracy measures and building a localization system utilizing AI. In the music sector, it is indicated that revenue from distribution, live performances, merchandise, and other sources will be expanded through the formation of overseas fandoms centered on anime songs and other content. In the live-action sector, it is indicated that overseas revenue will be expanded through the production of large-scale works utilizing external funding, the development of advanced production infrastructure including VFX, and the overseas expansion of streaming platforms in which Japanese companies participate and international co-productions.

Through these efforts, the target is to expand the overseas sales of Japan-originated content to 20 trillion yen by 2033, with sector-specific overseas sales targets set at 12 trillion yen for games, 6 trillion yen for animation, 1 trillion yen for manga, 0.7 trillion yen for music, and 0.5 trillion yen for live-action.

The Government will appropriately manage the progress of each initiative in order to steadily advance this roadmap. In doing so, it is important to develop a system capable of implementing policies continuously and seamlessly. At the same time, while the promotion of the content industry should be pursued through a unified public-private effort, with private sector initiatives at its core, government support must effectively support and facilitate those private sector efforts.

<Content and Regional Revitalization Virtuous Cycle Plan>

(As described in III.4.(1) above)

<Improving Business Development Capabilities for Overseas Expansion>

In order to achieve the target of expanding the overseas market size of Japan-originated content to 20 trillion yen by 2033, it is necessary to have a content industry that can continuously create and develop content and IP. While advancing structural

reforms to adapt to digital business and strengthening content human resources in each sector as a foundation, efforts must be made to improve business development capabilities for overseas expansion.

As direct measures to strengthen overseas expansion, in addition to anti-piracy measures, expanding the reach of works in languages not previously covered through localization (translation, etc.) is expected to lead to market expansion. It is also important to expand revenues derived from existing IP. For example, in addition to developing new IP, it is important to maximize the value generated by IP through diversification of IP including merchandise, reuse of existing IP such as past games, and collaboration across different sectors. At the same time, as the distribution of works through international platforms in digital form is increasing, the organization of metadata is important in the music sector and other fields from the perspective of returning revenues to rights holders, and in the case of video works, it is important that viewing figures and other information be disclosed by platform operators to content production companies and others when negotiating transaction terms.

From the perspective of increasing the number of works that can compete globally, it is important to focus support on the development of human resources capable of producing high-quality works and on the production of large-scale works that can aim for global hits. For example, the Ministry of Economy, Trade and Industry's Content Industry Growth Investment Support Project in the FY2025 supplementary budget includes support for the production of large-scale works, support for the creation of new IP, and support for the expansion of distribution platforms. Furthermore, in the process of the FY2026 tax reform, the content industry was included in the scope of the investment promotion tax credit. Under this, a 7% tax credit on production equipment and other assets is applicable under certain conditions, which contributes to promoting capital investment.

In expanding overseas expansion, it is also necessary to examine funding methods. In Japan, the production committee system has become widely established in the production of video content such as animation and films. This system has the advantage of distributing high investment risks among multiple companies, and allowing constituent members to mitigate investment risk by receiving window fees. However, challenges are also pointed out, such as the fact that production scale does not grow because constituent members determine their investment amounts based on expected window fees, and the constraints arising from the principle of unanimous consent required to enable business development of works that leverages the strengths of

constituent members. Taking these points into account, it is important to examine diverse funding methods.

International co-production is also one means of funding. Furthermore, attracting location shoots for large-scale overseas productions (live-action) contributes to improving the technical skills of domestic production staff, promotes Japan's appeal overseas, contributes to inbound tourism, and is important from the perspective of Cool Japan.

Regarding the attraction of location shoots, based on discussions at the Study Group on Improving the Environment for Location Shooting (Secretariat: the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters), the "Location Shooting Handbook – What Stakeholders Should Know for Expanding Location Shooting and Attraction" published jointly by concerned government ministries and agencies in March 2025 is being further disseminated through the publication of easy-to-understand materials and an English version.

<Promoting Business Structural Reform in Response to the Situation and Challenges Surrounding the Diversification of Intellectual Property and the Utilization of Generative AI>

The creation, distribution, and consumption of content that transcends traditional genres is expanding new business opportunities while also generating new challenges and various risks. For example, in the film sector, there are cases where local governments that had previously focused on location attraction with the cooperation of film commissions are now directly involved in film production with the participation of citizens and related organizations, conducting promotions and linking them to the promotion of local industries. In the animation sector, there are cases where production companies that had maintained their operations by receiving commissions under the production committee system have achieved great success by fully funding production costs themselves and conducting promotions. Regarding generative AI, as indicated in III.1.(2), various challenges continue to be pointed out from the perspective of ensuring transparency that leads to appropriate protection and utilization of intellectual property, and concerns about so-called "controversy risks" and other issues continue to be expressed. At the same time, there are also examples of proactive engagement with new forms of content creation, such as a national television network producing the first drama to make full use of generative AI.

It is important for the Government to follow these new initiatives and the various challenges that accompany them, and to respond appropriately and promptly, including

by formulating rules and participating in the coordination of opinions among stakeholders as necessary.

At the same time, toward the realization of fair and free competition, it is necessary to develop an environment that enables appropriate business development in accordance with guidelines and other materials issued by the Japan Fair Trade Commission and concerned government ministries and agencies, from the perspective of realizing appropriate remuneration and facilitating smooth rights processing. It is also necessary to further improve the contract literacy of creators and content production companies. In addition, regarding the desirable remuneration for performers and record producers in connection with the performance and communication of records, a bill to amend the Copyright Act was decided at a Cabinet meeting on May 15, 2026, and consideration will continue to be advanced, including on operational aspects, while giving due consideration to the concerns and requests raised by stakeholders, including smooth rights processing.

<Strengthening Human Resources Supporting the Content Industry>

Human resources are the source of content creation. In order to attract many young people to the content industry and to remain an industry that engages in the creation of innovative content, it is indispensable to develop an environment in which creators can work with peace of mind on a sustainable basis and for the content industry to take steps toward appropriate transactions and other improvements. In this context, it is effective, for example, to build a framework for developing exceptional talent and creators, including overseas dispatch programs, and to develop digital creators who can make full use of cutting-edge digital technologies.

In order to develop original creators who produce high-quality works based on innovative ideas, it is necessary to provide seamless support tailored to career stages, from planning and negotiation of works and performances to overseas expansion.

Furthermore, in promoting structural reforms to adapt to digital business and advancing overseas business expansion, the creation of new IP, and the transformation of production methods and processes, global business human resources who can lead the creation of new business models and handle the examination of overseas expansion strategies and the negotiation of transaction terms with overseas companies including platform operators are indispensable. From the perspective of advancing the return of remuneration to domestic production companies, it is important to promote the development of such human resources, and for that purpose, it is necessary to enhance various measures that contribute to securing opportunities to gain the necessary

experience, including through the use of study abroad opportunities.

Furthermore, regarding human resources who handle production operations adapted to new technologies, it is necessary for the "visualization of skills" required in each sector such as games, animation, manga, live-action, music, performing arts, and art to be achieved, and for learning opportunities through higher education corresponding to those skills to be provided. In achieving the "visualization of skills," it is necessary for higher education institutions and industry in each sector to collaborate to develop human resources that companies truly need, and it is necessary to promote measures in a multilayered manner toward securing treatment commensurate with skills and improving working conditions.

Regarding the development of human resources involved in content development and utilization, it is necessary to promote measures in a multilayered manner, while noting that it is necessary to develop human resources according to the roles required, including creators and producer human resources.

<Strengthening Anti-Piracy Measures>

(As described in III.2.(2) above)

<Promotion of Digital Archives>

The government is working to create a “digital archive society” where digital archives are used on a daily basis to support a wide range of creative activities. In cooperation with archive institutions in various fields and concerned government ministries, digital archives are being promoted.

Specifically, the government launched Japan Search in 2020 as a platform for searching, viewing, and utilizing metadata on content in various fields, such as cultural properties, art, and books. From March 2024, as a new promotion system for digital archives (hereinafter referred to as the “Digital Archive Japan Promotion System”), the “Digital Archive Strategy Council” and the “Study Group on the Promotion of Digital Archives” (Secretariat: the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters) were established to further promote initiatives related to digital archives and to revitalize the creation of new value through the full utilization of diverse archived content assets.



(Source) https://jpsearch.go.jp/

Figure 42: Japan Search (Top Page)

Under this promotion system, Japan's digital archives are being developed through public-private partnerships, and in May 2025, the “Digital Archives Strategy 2026-2030” was formulated and released.

The strategy sets priorities for the five-year period from FY 2026 and positions this period as a time to establish frameworks and systems for promoting digital archives in Japan over the next five years and to lay the groundwork for revitalizing nationwide efforts to promote digital archives, with Japan Search as the cornerstone.

The strategy aims to bring the scale, scope, and convenience of Japan Search to the same level as Europeana[47], while taking into account the differences between Europeana and Japan Search. It also sets targets for Japan Search and national archives, such as increasing the number of linked metadata to 50 million by 2030 (32 million as of March 2026) and increasing the number of publicly available content.

In addition, one form of government support identified is the showcasing of effective practical examples, and it is planned to continue sharing and commending effective practical examples through guidelines and pages on Japan Search's utilization cases, as well as through events such as the "Digital Archive Fes" and the "Digital Archive Japan Award," where stakeholders from various fields including archive institutions and users from industry, academia, and government gather.

[47] Cross-sectoral integrated portal within the EU.

In light of this strategy, it is necessary to manage the progress toward the achievement targets of national archive institutions and others, and to proceed with the creation of a foundation for promoting digital archives in Japan, including consideration of the legal framework for the concept and objectives of digital archives and the roles and cooperation of stakeholders.

Furthermore, past manga, animation, and game works, as well as intermediate products such as original drawings, storyboards, and setting materials, are valuable assets that enhance the value of works and promote the deepening of creative activities by future creators. Therefore, it is important to realize, through public-private collaboration, the concept of “National Center for Media Arts” (tentative name) that has functions for the collection, preservation, and digitization of intermediate products, research and human resource development functions, and functions for information dissemination, exhibition, and utilization.

<Regarding KPIs>

The Intellectual Property Strategic Program 2025 set a KPI of "expanding the overseas market size of Japan-originated content to 20 trillion yen by 2033," and the overseas market size of Japan-originated content in 2024 was approximately 6.1 trillion yen, exceeding the 5.8 trillion yen of the previous year.

Regarding digital archives, the Intellectual Property Strategic Program 2025 set a KPI of "aiming for Japan Search to reach the scale, scope, and usability of Europeana by 2035." Using the number of linked metadata items as a reference, the number of linked metadata items in Japan Search was 32,163,179 as of March 26, 2026, while the number of linked metadata items in Europeana was 61,426,763 as of the same date. The following KPIs will be followed up from FY2026 onward, which is the target period of the "Digital Archive New Strategy 2026-2030" (May 2025).

- The target is for metadata to be organized for 100% of the collection materials that should be organized at national archive institutions and others by 2030, and for the number of content items with unorganized secondary use conditions to be reduced to zero by 2030.
- The target is to increase the number of linked metadata items in Japan Search from 32 million to 50 million by 2030, and to increase the number of linked sector and regional archives from 67 institutions to 80 institutions by 2030.

(Direction of Measures)

<Steady Promotion of the Content Sector Public-Private Investment Roadmap>

- A new seamless support system will be established to optimize the overall allocation of budgets, unify budget execution, and bring together the wisdom of the public and private sectors.

(Short term and mid term) (CAO (IP), METI, Agency for Cultural Affairs, MIC, MOFA, Japan Fair Trade Commission, MHLW)

- The appropriate approach to developing statistical data and other information necessary for the continuous monitoring of the number of workers in the content industry, market size, and other indicators will be examined.

(Short term and mid term) (CAO (IP), METI, and concerned government ministries and agencies)

- Toward achieving the target of expanding the overseas market size of Japan-originated content to 20 trillion yen by 2033, large-scale, long-term, and strategic public-private investment, including multi-year support, will be promoted so as not to be at a disadvantage in international competition, and growth investment will be expanded to promote overseas expansion.

(Short term and mid term) (CAO (IP), METI, Agency for Cultural Affairs, MIC, concerned government ministries and agencies)

<Content and Regional Revitalization Virtuous Cycle Plan>

(As described in III.4.(1) above)

<Improving Business Development Capabilities for Overseas Expansion>

- Toward achieving the government target of expanding the overseas market size of the content industry to 20 trillion yen by 2033, the specific measures and implementation for future entertainment and creative industry policymaking will be steadily advanced through public-private collaboration at the "Entertainment and Creative Industry Policy Study Group."

(Short term and mid term) (METI, concerned government ministries and agencies)

- In order to strengthen the collection and sharing of overseas marketing information and the matching function with local players overseas, content specialists will be placed at JETRO, and JETRO will be utilized as an overseas support base to promote support for the overseas expansion of the content industry and the development of core networks to local markets.

(Short term and mid term) (METI, CAO (IP),

concerned government ministries and agencies)

- Since content investment in large-scale works aimed at overseas expansion is high-risk, there is a risk that companies will suppress the scale of investment and miss potential profits. Therefore, in conjunction with business structural reform, support will be provided for the production and development of large-scale works for overseas markets by content production and development businesses that can aim for future global mega-hits. In doing so, seamless support will be provided from pre-production to promotion.

(Short term and mid term) (METI)

- Guidelines on the appropriate conduct of transactions (including disclosure of viewing figures and other information in the case of production commissions) regarding the clarification of transaction terms between production committees and streaming platforms, and the setting of transaction terms, will be formulated.

(Short term) (Japan Fair Trade Commission, CAO (IP))

- In order to capture expanding overseas demand and expand the market for Japan-originated content, support will be provided for strengthening production capabilities for overseas expansion of content, acquiring production and distribution know-how, strengthening the functions of distribution platforms, and promotion and localization (translation, etc.).

(Short term and mid term) (METI, Agency for Cultural Affairs, concerned government ministries and agencies)

- In specific countries in Southeast Asia, Japanese broadcast content will be aggregated and distributed to verify content receptivity and to understand and analyze viewing trends from viewing data. Support will be provided for the acquisition or use of advanced equipment and other costs in the production of live-action content premised on overseas expansion. In addition, seminars and overseas training programs will be conducted for producers and production technology personnel at program production companies and broadcasting operators, and consideration will be given to the standardization of skills. Furthermore, effective methods of external funding through international co-production and investment at domestic and international pitching events will be verified.

(Short term and mid term) (MIC)

- In order to promote the expansion of broadcast and streaming content that aims from the outset for overseas expansion including streaming, public and private sectors will collaborate to advance efforts toward promoting the overseas expansion of live-action content and strengthening production capabilities.

(Short term and mid term) (MIC)

- Support for securing opportunities to exhibit works at globally influential art museums will be examined. Support will also be provided for exhibiting at Japan Pavilions and Japan Booths at international film festivals and international trade fairs, and for promoting works at such venues. In addition, exchanges between domestic and overseas producers and the overseas expansion of Japanese films will be broadly supported, and strategic and effective overseas dissemination methods will be examined by both the public and private sectors for international film festivals including the Tokyo International Film Festival and other domestic and international film festivals.

(Short term and mid term) (METI, Agency for Cultural Affairs, concerned government ministries and agencies)

- Through the promotion of international co-production of video works in particular, support for human resource development and production support tailored to career stages targeting young artists and others will be linked to the dissemination of Japanese culture and the overseas expansion of content.

(Short term and mid term) (Agency for Cultural Affairs, concerned government ministries and agencies)

- At domestic and international trade fairs, effective methods of information dissemination toward further promoting the overseas expansion of broadcast content will be verified. In addition, market research for overseas expansion will be conducted.

(Short term and mid term) (MIC)

- In order to capture expanding overseas demand and expand the market for Japan-originated content, support will be provided for live performances and other events held locally overseas that contribute to the formation of global fandoms for Japanese content.

(Short term and mid term) (METI)

- In order to facilitate and promote location shooting and attraction, understanding and mutual comprehension among stakeholders will be further deepened through the dissemination of a handbook summarizing matters to be addressed by film commissions (FCs), licensing authorities, producers, and others.

(Short term and mid term) (CAO (IP), National Police Agency, Fire and Disaster Management Agency, Immigration Services Agency, MLIT, concerned government ministries and agencies) [Repeated]

- In the ASEAN region, screenings of internationally co-produced films and other

works will be held, and events introducing attractive locations related to the screened works and local products will be organized to continue attracting inbound tourism through film. In addition, the National Film Archive of Japan will operate a "Location Database" that aggregates and enables integrated searching of "location information" and other data held and accumulated by film commissions across Japan on the Internet, thereby disseminating Japan's attractive locations both domestically and internationally, promoting film shooting in Japan, and activating creative activities in Japanese cinema.

(Short term and mid term) (Agency for Cultural Affairs, MOFA, METI)

- Comprehensive support will be provided for the development of tourism content utilizing content such as animation, manga, films, and live-action, effective information dissemination, and market development, and efforts toward the supply of tourism content such as location tourism and anime tourism will be promoted through a unified public-private effort. In addition, the development of a welcoming environment including the advancement of secondary transportation at tourist destinations will be promoted.

(Short term and mid term) (Japan Tourism Agency, MLIT) [Repeated]

- In order to effectively realize economic and social industrial promotion through location attraction, efforts will be made to provide incentives and ensure effective operation toward attracting productions including post-production processes including VFX. Support for smooth shooting of works eligible for incentives will also be examined, and the utilization of completed works in location areas will be promoted.

(Short term and mid term) (METI, CAO (IP),
concerned government ministries and agencies) [Repeated]

- Utilizing private sector vitality and other means, the functions of national parks and public facilities will be enhanced to make them modern cultural and information dissemination hubs. Specifically, the use of Kitanomaru Park as a dissemination hub for cutting-edge science, art, culture, and other fields will be examined.

(Short term and mid term) (Agency for Cultural Affairs, MOE,
concerned government ministries and agencies) [Repeated]

- The development of human resources in the field of media arts, which is highly regarded overseas, and the collection, preservation, exhibition, and utilization of related materials will be promoted. Efforts will be promoted through public-private collaboration toward the development of a hub with the functions of “National

Center for Media Arts”(tentative name) that has the following functions related to manga, animation, special effects, and game works, original drawings and other intermediate products, and related information: (1) collection, preservation, and digitization; (2) research; (3) human resource development and education; (4) domestic and international information dissemination; (5) exhibition and utilization; and (6) dissemination and exchange. In particular, regarding (5) and (6), necessary measures will be taken toward their realization after clarifying the specific form of the hub.

(Short term and mid term) (Agency for Cultural Affairs, METI, CAO (IP)) [Repeated]

- In order to disseminate and promote literary works, manga, and other content overseas, support will be provided to intermediaries who can convey the value of works, so that overseas expansion is carried out on a per-author basis and based on inclusive themes. In addition, specialists who can translate and critique works taking into account overseas cultures and values will be identified and developed.

(Short term and mid term) (Agency for Cultural Affairs)

- In countries where diplomatic and exchange strengthening is needed, screenings at theaters and online distribution with lineups tailored to local needs will be conducted to promote understanding of Japan and to increase the demand for viewing Japanese films and other video content, thereby cultivating the ground for overseas expansion.

(Short term and mid term) (MOFA)

- Toward the overseas expansion of the content industry, information collection and provision support on demand trends and regulatory trends for works in overseas markets will be provided, and overseas expansion including the creation of new IP, production of large-scale works, expansion of distribution platforms, development of development platforms, localization, and promotion will be supported. In particular, tax measures will also be utilized for capital investment and research and development. Anti-piracy measures, development of the working environment, and development of the funding environment will also be carried out. The use of advanced technologies such as AI, XR, and blockchain will be promoted to improve the quality of content, create innovative content, or improve the productivity of content production, and the development of creators who can produce and disseminate such content will be supported.

(Short term and mid term) (METI, Agency for Cultural Affairs)

- In order to support the overseas expansion of artists, appropriate measures will

be taken regarding the introduction of performance and communication rights for records, based on the report of the Copyright Subcommittee of the Council for Cultural Affairs (March 2026).

(Short term and mid term) (Agency for Cultural Affairs, concerned government ministries and agencies)

<Promoting Business Structural Reform in Response to the Situation and Challenges Surrounding the Diversification of Intellectual Property and the Utilization of Generative AI>

- As it is anticipated that digital natives will become the core consumers and contributors to the content industry in the future, developing an industrial foundation capable of creating high-quality digital content utilizing new digital technologies and other means will determine the competitiveness of the content industry in the future. Therefore, the creation of high-quality digital content utilizing new digital technologies and other means will be promoted, and the development of creators who can produce and disseminate such content will be supported.

(Short term and mid term) (Agency for Cultural Affairs, METI)

- Specific measures for realizing appropriate remuneration in the digital age, including contract terms, in the copyright field will be examined, taking into account the status of use of copyrighted works on content distribution platforms and posting sites (including actual conditions of use involving rights infringement), the role of digital platform services in the content market, and international trends and domestic competition policy, digital platform policy, information and communications policy, and other policies.

(Short term and mid term) (Agency for Cultural Affairs)

- The revised Copyright Act enacted in 2026, including the unmanaged works adjudication system, will be steadily operated so as to promote the virtuous cycle of content creation in the digital age and contribute to the return of remuneration to creators. In addition, in conjunction with the launch of the "Cross-Sector Rights Information Search System" made public alongside the enforcement of the system, collaboration with organizations holding databases in various fields will be advanced, and appropriate expression of intent by individual creators and others regarding the availability of copyrighted works will be encouraged through the promotion of registration in the "Individual Creator Rights Information Registration System."

(Short term and mid term) (Agency for Cultural Affairs)

- Verification of systems contributing to the streamlining of rights processing for online distribution of broadcast content and surveys on rights processing for overseas expansion will continue to be conducted. In addition, regarding the framework for cooperation and division of roles among telecommunications-related businesses that act as intermediaries for content distribution on the Internet, while noting that rights processing should in principle be carried out by those who make secondary use of the relevant copyrighted works, consideration will be given to requesting cooperation from telecommunications-related businesses from the perspective of facilitating negotiations and other processes.

  (Short term and mid term) (MIC, concerned government ministries and agencies)

- An environment will be developed to create a virtuous cycle in which Japan-originated content distributed globally can generate revenue and reinvest it, by securing international distribution networks for Japanese distribution platforms and strengthening competitiveness through the rapid expansion of both overseas-targeted content and overseas fans, and through support for mutual collaboration between distribution platforms.

  (Short term and mid term) (METI, concerned government ministries and agencies)

- The Act on Promotion of Competition for Specified Software Used on Smartphones, which came into force in 2025, will continue to be publicized and disseminated, and the Act will be effectively enforced.

  (Short term and mid term) (Japan Fair Trade Commission)

- Based on the Act on Prevention of Unjust Resale of Specified Tickets for Entertainment Events (Anti-Ticket Scalping Act), effective operation will be carried out through thorough enforcement of violations, public awareness and dissemination, and consultation support, and efforts will be made to promote the distribution of legitimate tickets.

  (Short term and mid term) (Agency for Cultural Affairs, Consumer Affairs Agency, National Police Agency)

<Strengthening Human Resources Supporting the Content Industry>

- In order to support the challenges of young creators, artists, and others with a view to overseas expansion and to strengthen the development system, integrated activities by creators and others who will lead the next generation in fields including games, animation, manga, live-action, music, performing arts, and art, covering planning, negotiation, production, presentation, and overseas expansion

of works and performances, will be flexibly supported over multiple years, aiming for the results to be fed back into the development of the next generation. The initiatives of the Creator Fund under the FY2023 supplementary budget will be verified, and the next measures will be examined based on the status of achievement of outcome targets.

(Short term and mid term) (Agency for Cultural Affairs)

- Support through the process of producing works and performances will be made seamless in accordance with the career stage of creators, and the development of global business human resources who handle overseas expansion through work production, legal affairs, management, and cross-sector collaboration, simultaneously with the development of creators and others, will be promoted.

(Short term and mid term) (Agency for Cultural Affairs)

- The standardization and dissemination of skills required for content production operations, including new technologies such as AI, will be used to support human resource development at higher education institutions and training conducted by companies and through inter-company collaboration. The functions of hubs for education and research in animation, games, and other fields at higher education institutions will be strengthened.

(Short term and mid term) (Agency for Cultural Affairs)

- Toward building an overseas dissemination foundation for content including the manga sector, which is expected to see further growth, efforts will be promoted including the creation and operation of a public-private consortium toward the development of a next-generation digital distribution platform in the manga sector, the development of human resources supporting content production and dissemination such as translators, and strategic and comprehensive dissemination of content culture.

(Short term and mid term) (Agency for Cultural Affairs)

- Subsidies will be provided to cover production costs, development costs, marketing costs, and other support by subsidy operators, as well as costs for incubation support for commercialization, for projects by startups and others including creators and supporting human resources that newly produce and develop high-quality content, thereby supporting businesses that create high-quality content.

(Short term and mid term) (METI)

- In order to effectively and strategically advance the international dissemination and global expansion of Japanese culture and arts while incorporating a business

mindset, a comprehensive support program will be jointly implemented by the public and private sectors, including support for participation and matching to venues where top-level artists and others can build careers at the global level, including international centers in the relevant art fields as well as from the perspective of future economic growth and the Global South, and support for network building and promotional activities overseas.

(Short term and mid term) (Agency for Cultural Affairs)

- Efforts contributing to the creation of content and the sophistication of monetization methods through the use of advanced technologies, the reform of industry structures, and the reform of content distribution structures in the entertainment industry will be supported in response to the various challenges surrounding the entertainment industry.

(Short term and mid term) (METI, concerned government ministries and agencies)

- For appropriate human resource development in the content industry, the actual conditions of mismatches in human resources and skills required in each genre as clarified by industry will be examined through public-private collaboration to develop measures for improvement, and the future vision of the labor market will be clarified to enhance the predictability of workers and contribute to improving their motivation to work.

(Short term and mid term) (METI, Agency for Cultural Affairs, concerned government ministries and agencies)

- Creative activities and human resource development in a wide range of cultural arts, which are the source of the depth and diversity of Japan's content, will be supported, and the high value-added development of cultural facilities such as theaters and concert halls, which serve as bases for activities, will be advanced, and the formation of new activity bases for creators and artists will be supported.

(Short term and mid term) (Agency for Cultural Affairs)

- In elementary and secondary education, opportunities for education that nurtures sensibility and creativity will be secured, including deepening understanding of the role of content in making society rich and vibrant, the value of creation, and intellectual property, through learning in arts subjects and other subjects, thereby contributing to the development of future contributors. In addition, opportunities for diverse cultural experiences and creative activities including music, manga, and animation will be secured through club activities and community club activities.

(Short term and mid term) (Agency for Cultural Affairs)

- While taking into account new forms of contracts in the DX era, the "Copyright

Contract Creation Support System," which provides standard contract templates to support contracts related to the use of copyrighted works, and the "Copyright Contract Manual for Everyone," aimed at those not necessarily well-versed in copyright, will be updated in a timely manner to support freelance creators and others.

(Short term and mid term) (Agency for Cultural Affairs)

- Toward securing appropriate revenues for creators, the future approach of a consultation service providing individual support by specialists such as lawyers regarding challenges related to contract creation when creators develop their businesses will be examined.

(Short term and mid term) (Agency for Cultural Affairs)

- Toward building appropriate contractual relationships in the cultural arts field, the guidelines including contract templates published in July 2022 will be disseminated and publicized, and efforts toward improving the working environment for cultural arts stakeholders including freelance artists will be advanced through specific initiatives such as holding training sessions and establishing consultation services.

(Short term and mid term) (Agency for Cultural Affairs)

- Toward improving the dignified creative environment for individual artists and others, measures will be taken to promote proactive efforts by cultural arts organizations to address challenges such as harassment and working conditions in the cultural arts field, including by encouraging functional improvements in cultural arts organizations.

(Short term and mid term) (Agency for Cultural Affairs)

- The Act on the Proper Treatment of Specified Business Operators and Optimization of Transactions between Business Operators (Freelance Act), which came into force in 2024, will continue to be publicized and disseminated to ensure thorough compliance.

(Short term and mid term) (Japan Fair Trade Commission, Small and Medium Enterprise Agency, MHLW)

- Regarding the Act on Prevention of Delayed Payment of Subcontracting Fees and Other Related Matters to Small and Medium-Sized Subcontractors in Manufacturing Consignment and Other Transactions, which newly incorporates the prohibition of "unilateral price determination without consultation" and other provisions, public awareness and dissemination efforts will be advanced, and violations of the Act will be dealt with strictly. In addition, compliance with the

revised guidelines on passing on labor cost increases, revised in January 2026, will be verified to ensure thorough compliance throughout the deep layers of supply chains, and further dissemination and awareness-raising efforts will be undertaken in collaboration with industry-supervising ministries and agencies.

(Short term and mid term) (Cabinet Secretariat (Japan Growth Strategy Headquarters Secretariat), Japan Fair Trade Commission, Small and Medium Enterprise Agency, concerned government ministries and agencies)

・ In order to further improve the appropriateness of transactions in the production of broadcast content, guidelines covering the Act on Prevention of Delayed Payment of Subcontracting Fees and Other Related Matters to Small and Medium-Sized Subcontractors in Manufacturing Consignment and Other Transactions, the Act on Prohibition of Private Monopolization and Maintenance of Fair Trade, and other relevant laws will be revised as necessary, and broad dissemination will be carried out to ensure thorough compliance.

(Short term and mid term) (MIC)

・ Appropriate price negotiations between ordering companies and receiving companies will be promoted through the promotion of Partnership Building Declarations, the organization of freelancers and others into occupation-based organizations utilizing small and medium-sized enterprise cooperatives, hearing surveys by Transaction G-men and Superiority G-men, and the use of consultation services.

(Short term and mid term) (Small and Medium Enterprise Agency, Japan Fair Trade Commission, CAO (Director-General for Economic and Fiscal Management), concerned government ministries and agencies)

・ Guidelines on the trading environment for creators in the production sites of films and animation will be formulated at an early stage, and dissemination will be carried out so that they are sufficiently recognized by freelancers and related businesses, and their promotion and appropriate operation will be ensured.

(Short term) (Japan Fair Trade Commission, CAO (IP))

・ Support for domestic video production and other businesses will be structured to take into account compliance with the Labor Standards Act and other relevant laws, thereby promoting improvements in the production environment. In addition, in the screening of subsidy and other support programs, support programs that add points or set requirements for works produced in accordance with the appropriate transaction guidelines formulated by the Japan Motion Picture Producers Association will be promoted, and solutions to various challenges associated with

improvements in the production working environment will be examined.

(Short term and mid term) (METI, Agency for Cultural Affairs, MIC)

- Taking the initiatives of the Japan Motion Picture Producers Association as a reference, relevant organizations and others will be encouraged to extend these initiatives to other content sectors, and efforts to raise awareness of these initiatives will be promoted.

(Short term and mid term) (METI)

- Working environment improvements will be achieved through the promotion of transaction guidelines for the sustainable development of film production, and industry self-action plans and other measures for appropriate transactions will be encouraged, taking into account the "Guidelines on Price Negotiations for Appropriate Pass-Through of Labor Costs."

(Short term and mid term) (METI)

<Strengthening Anti-Piracy Measures>

(As described in III.2.(2) above)

<Promotion of Digital Archives>

- Under the “Digital Archive Strategy 2026-2030” formulated by the Digital Archive Japan Promotion Organization, comprehensive efforts will be made to promote digital archives, including the digitalization of content.

(Short term and mid term) (CAO (IP), National Diet Library[48], concerned government ministries and agencies)

- To promote digital archives, share and recognize effective practical examples through the “Digital Archive Fes” and “Digital Archive Japan Award” under the Digital Archive Japan Promotion System.

(Short term and mid term) (CAO (IP), National Diet Library)

- Under the targets outlined in the “Digital Archive Strategy 2026-2030,” expand digital archives and facilitate their utilization in each of the areas indicated in the strategy. While taking into consideration the significance of digital archives in each field, make efforts to promote the digitalization and preservation of content, including born-digital content media, and the promotion of openness that enables the free secondary use of such content. Where possible, make further use of digitized content by utilizing it for online distribution and monetizing it through

[48] The National Diet Library belongs to the legislative branch; however, as digital archive measures are to be addressed on a whole-of-government basis and the Library plays an important role in this regard, its projects related to this plan are listed in the responsible agency column for convenience.

overseas expansion. Promote the digitalization of materials held by the National Diet Library and expand the online transmission of out-of-print materials.

(Short term and mid term) (CAO(IP, Public Records, Science and Technology), Digital Agency, MIC, MEXT, METI, Japan Tourism Agency, National Diet Library)

- Support the digital archiving of cultural heritage and the preservation and utilization of media artworks such as manga, anime, and games, and performing arts. Efforts will be promoted through public-private collaboration toward the development of a hub with the functions of a “National Center for Media Arts” (tentative name) promote the digital archiving of cultural and artistic works by organizing manga, anime, special effects, and game-related initiatives, as well as intermediate products such as original drawings and related information. Additionally, we will create a venue for content dissemination in collaboration with Japan Search, and promote mutual guidance among users. The center's activities will include: (1) collection, preservation, and digitalization, (2) research and study, (3) human resources development and education, (4) information dissemination in Japan and overseas, (5) exhibition and utilization, (6) promotion and exchange. In particular, regarding (5) and (6), necessary measures will be taken toward their realization after clarifying the specific form of the hub.

(Short term and mid term) (Agency for Cultural Affairs, METI, CAO (IP))

- In Japan Search, a platform that allows users to search, view, and utilize information on a wide variety of Japanese content, further expansion of cooperation with archival institutions will be pursued, including the expansion of partnerships, to enable comprehensive navigation of various digital information resources.

(Short term and mid term) (CAO (IP), National Diet Library, concerned government ministries and agencies)

- In cooperation with concerned government ministries and agencies, reinforce publicity and awareness of utilization models that utilize Japan Search's collaborative content in various fields and themes, such as education, academia, research, tourism, and regional revitalization, to expand opportunities for utilization while promoting multilingualization and exchanges with overseas archival institutions to strengthen dissemination overseas. To promote the efficient use of digital content held by Japan Search partner archives, the terms and conditions for secondary use of such 142 content will also be clearly displayed by each institution.

(Short term and mid term) (CAO (IP), National Diet Library, concerned government ministries and agencies)

- Taking the 100th anniversary of the Showa era as an opportunity, promote the collection and organization of documents, photographs, videos, and other materials related to historical facts of the Showa era, including the discovery of materials held by individuals and companies, and encourage the archiving of these materials using the latest technologies such as ICT and their publication in an easily accessible form.

  (Short term) (Cabinet Secretariat “Showa 100th Anniversary” Policy Promotion Office, concerned government ministries)

(Annex) Results of the FY2025 Follow-up Based on the "New International Standards Strategy"

（1） Specific Initiatives by Ministries and Agencies

With respect to the list of measures set forth in the Annex to the "New International Standards Strategy," the results of progress evaluations conducted based on KPIs established by each ministry and agency, along with examples of outcomes, are as follows.

Policy	Subcategory	# of Item	Progress Evaluation			
			◎	○	△	×
(1) Strengthening Industry-Academia-Government-Finance Collaboration	①Promote engagement with industry, academia, and the financial sector.	8	–	7	1	–
	②Shift perspectives among companies, research institutions, and government.	11	–	9	2	–
	③Promote the use of standards in public procurement and subsidy programs.	2	–	2	–	–
	④Incorporate standardization from the R&D stage.	11	–	11	–	–
	⑤Enhance the effectiveness of government support.	3	–	1	2	–
(2) Enhancing Standardization Ecosystem	①Strengthen human resource development systems.	11	–	8	3	–
	②Develop and strengthen specialized institutions and expand their utilization.	7	–	5	2	–
	③Promote regulations, standards, and certification in an integrated manner.	2	–	–	1	1
(3) Clarification of Standardization Strategy and Governance	①Establish a public-private coordination platform.	14	–	14	–	–
	②Build a platform for sharing expertise and talent information.	4	–	3	1	–
	③Strengthen coordination across government.	1	–	1	–	–
(4) Strengthening International Collaboration	①Develop standardization professionals and promote networking.	3	–	1	1	1
	②Promote mutual recognition, regulatory harmonization, and adoption.	16	1	13	1	1
	③Strengthen collaboration with ASEAN Member States and other countries.	13	–	10	2	1
	④Host international conferences on standardization in Japan.	3	–	2	1	–

(Source) Prepared by the Cabinet Office, Secretariat of Intellectual Property Strategy Headquarters

Annex Figure 1: Progress Status of Specific Initiatives in FY2025 under the "New International Standards Strategy"

(Strengthening Industry-Government-Academia-Finance Collaboration) <Raising Awareness and Changing Behavior among Industry, Academia, Finance, and Government; Utilization of Standards in Public Procurement and R&D Funding, etc.>

The main activities undertaken by ministries and agencies in FY2025 are as follows.

- Held awareness-raising events for senior management in collaboration with Keidanren (Japan Business Federation) and concerned government ministries and agencies (CAO)
- Regarding the incorporation of the content of the International Standards

Strategy into other national strategies and plans, the content of international standardization was incorporated into 12 strategies and plans (concerned government ministries and agencies)

- Requested affiliated national research and development agencies to incorporate international standardization activities into personnel evaluations; as a result, 6 national research and development agencies implemented personnel evaluations incorporating international standardization (concerned government ministries and agencies)
- Conducted a survey to understand the actual status of utilization of international/domestic standards in public procurement, and confirmed citation of standards in 3 cases (CAO, METI)
- Standardization support was incorporated into 3 research and development projects/funds (concerned government ministries and agencies)
- Launched a public-private high-level forum on international standards and consolidated information on domestic and international standardization activities (CAO, Keidanren)
- Held seminars at the Beyond 5G New Business Strategy Center (4 sessions, approximately 100 participants each) (MIC)
- Promoted the formulation of an international standards strategy for the agriculture, forestry, fisheries, and food sectors, and held seminars (MAFF)
- Held CSO workshops (2 sessions), verified the effectiveness of market-forming capability indicators, and reviewed items (METI)
- Led initiatives in quantum technology, perovskite solar cells, hydrogen and ammonia, biomanufacturing, and data linkage infrastructure (METI)

(Strengthening the Standards Ecosystem)

<Human Resource Development; Fostering and Strengthening Specialized Institutions (Specialized Services) and Their Utilization, etc.>

The main examples of outcomes in international standardization achieved by ministries and agencies in FY2025 are as follows.

① Human Resource Development

- Designed standardization human resource skill sets, training curricula, and business models in the information and communications field (MIC)
- Strengthened the foundation of specialized human resources for acquiring roles in the ITU, and developed human resources at small and medium-sized enterprises,

startups, and universities, as well as young professionals (MIC)

- Developed human resources through participation in international conferences and domestic deliberations for acquiring international standards for medical devices (MHLW)
- Organized and conducted training for human resources in the agriculture, forestry, fisheries, and food sectors (MAFF)
- Held study group meetings on collaboration between standardization and academia, and held seminars on standardization at academic societies and other venues (9 sessions) (METI)
- Expanded the number of registrants in the STAN Directory (173 persons) (METI)
- Held domestic Young Professionals programs (3 sessions × 4 days, 60 participants) and rule-making strategy training (5 sessions × 1 day, 125 participants) (METI)
- Developed human resources through active participation in international standardization activities and domestic deliberations in the fields of construction and aircraft (MLIT)

② Specialized Services

- Conducted needs surveys on testing and certification services, strengthened coordination, and examined the introduction of the New Approach (CAO)
- Held study group meetings on the utilization of the certification industry (3 sessions) (METI)
- Held seminars as part of standardization utilization support for small and medium-sized enterprises (53 sessions) (METI)

(Clarification of Standards Strategy and Governance)

<Public-Private Collaboration, Information Sharing, Inter-ministerial Coordination, etc.>

The main examples of outcomes in international standardization achieved by ministries and agencies in FY2025 are as follows.

- Launched a public-private high-level forum on international standards and commenced follow-up and monitoring (CAO)
- Collected local information through overseas public-private networks and shared it with the high-level forum (CAO)
- Held the "Standardization Utilization Promotion Task Force" and the

"International Standards Strategy Promotion Project Team" involving concerned government ministries and agencies (CAO)

- Discussed approaches to research and development with a view toward international standardization of research outcomes at the designated fund council for research and development projects under the "Economic Security Research and Development Promotion Program (K Program)" (CAO)
- Established a "Business Development-Oriented International Standardization and Intellectual Property Strategy Task Force" at the Beyond 5G New Business Strategy Center to examine approaches to international standardization and intellectual property strategies for accelerating social implementation and overseas expansion in the ICT field (MIC)
- Established an industry-academia collaborative project team within the National Institutes for Quantum Science and Technology (QST) on fusion (MEXT)
- Established public-private collaborative frameworks for quantum technology, perovskite solar cells, hydrogen and ammonia, biomanufacturing, and data linkage infrastructure (METI)
- Established domestic deliberation frameworks for international standardization of ports and terminals, and established a domestic consultative body for the aircraft and equipment industry (MLIT)
- Promoted the formulation of an international standards strategy for the agriculture, forestry, fisheries, and food sectors, and held seminars (MAFF)

(Strengthening International Collaboration)

<Strengthening International Networking; Promoting International Mutual Recognition; Strengthening Collaboration with Other Countries, etc.>

The main examples of outcomes in international standardization achieved by ministries and agencies in FY2025 are as follows.

① Formulation, Proposal, and Engagement in International Standards

- Progress in the number of Japan's contribution documents to the ITU, external expert evaluations, and the number of ITU recommendations resulting from Japan's engagement is proceeding at a pace exceeding the target values (MIC)

② Building International Collaboration and Cooperative Frameworks

- Commenced Japan-EU joint research and Japan-Germany joint research in the information and communications field (MIC)
- Established an international collaborative framework between the American

Society of Mechanical Engineers (ASME) and the Japan Society of Mechanical Engineers (JSME) toward international standardization of fusion energy (MEXT)

- Conducted training on international regulatory harmonization regarding pharmaceutical regulations for Asian countries (8 sessions) (MHLW)
- Pursued activities toward international mutual recognition between JASaff and the international accreditation body (Global ACI) (MAFF)

③ Strengthening the Foundation and Influence of International Standardization Activities

- In January 2026, Mr. Toshiyuki Onuma assumed the position of President of the ICAO Council (MLIT)
- In February 2026, a cooperation agreement was signed enabling simplified observer participation in all Technical Committees (TCs) and Joint Technical Committees (JTCs) under the European Committee for Electrotechnical Standardization (CENELEC) (METI)

④ Creating Opportunities for International Dissemination and Participation (Conferences, Events, etc.)

- Led the International Workshop Agreement on flood disaster management (IWA50) and held international workshops (2 sessions) (MLIT)
- Held the Japan-ASEAN Port Engineers Meeting (8 countries) and a public-private joint forum on vehicle standards and certification systems (10 countries) (MLIT)
- Participated in the NEAS Forum, hosted PASC in Japan, held ACCSQ-related workshops online, participated in the APEC Committee on Trade and Investment Sub-Committee on Standards and Conformance (SCSC), and dispatched lecturers to and hosted related workshops in Japan (METI)
- Hosted international conferences in individual fields at ISO and IEC in Japan, and established a new preparatory committee for hosting the 2029 IEC General Meeting in Japan (METI)
- Conducted specialized courses on Japan-originated standards such as JAS for universities in 10 ASEAN countries (MAFF)

（2） Initiatives by Domain

With respect to the 17 strategic and priority domains established under the New International Standards Strategy, the main international standardization initiatives

undertaken by ministries and agencies in FY2025 are as follows.

①-1 Environment and Energy (Climate Change, Energy, and GX)

- Supported the development of GHG selection and reporting systems in ASEAN and prepared guidelines for calculating emission reduction volumes (METI)
- Examined the formulation of a standardization strategy for the hydrogen and ammonia sector (METI)
- Presented outcomes at IEC/TC82 on performance evaluation and related matters for perovskite solar cells (METI)
- Collaborated with the United Kingdom and Poland on high-temperature gas-cooled reactors (MEXT, METI)

①-2 Environment and Energy (Nature Coexistence)

- Examined the international standardization strategy for this domain in the "Working Group on Formulating an International Standardization Strategy for the Nature Coexistence Domain" (CAO, concerned government ministries and agencies)
- Examined standards in the Foundation/Cross-cutting WG, Biodiversity WG, and Water WG under the "Project for Promoting Rule-Making and Market Creation in Each Sector Based on the Nature-Positive Economy Transition Strategy" (MOE)
- Examined evaluation standards for green infrastructure (MLIT)

①-3 Environment and Energy (Circular Economy)

- Supported the formulation of public-private partnership (PPP) procurement guidelines for waste-to-energy projects (MOE)
- Proposed and published a standard on test methods for bulk density of solid recovered fuel (SRF) (ISO18708) (MOE)
- Examined information disclosure schemes and circularity indicators for value chains related to the circular economy (MOE)
- Exchanged views with relevant organizations on international standardization (CAO)

② Food, Agriculture, Forestry, and Fisheries

- Registered a new work item proposal (NP) at ISO on test methods for freshness of fish (MAFF)
- Participated in Codex Alimentarius Commission subsidiary bodies on

international food standards (MHLW, MAFF, Consumer Affairs Agency)

③ Disaster Prevention and Mitigation

- Examined standardization strategies for the disaster prevention and mitigation domain in the "Working Group on Formulating an International Standardization Strategy for the Disaster Prevention and Mitigation Domain" (CAO, concerned government ministries and agencies)
- Organized issues related to disaster risk finance and the development and implementation of related standards (METI)
- Promoted standardization in flood disaster management (MLIT)

④-1 Digital and AI (Digital)

- Examined standardization strategies in the "Study Group on International Standardization Responses for Data Linkage Infrastructure" (METI)
- Engaged in activities at ISO/TC215 on a "model bridging healthcare professionals' healthcare processes and patients' self-care processes" (MHLW)

④-2 Digital and AI (AI)

- Promoted conformity assessment in the AI field. As part of the AI Basic Plan, participated in ISO/IEC JTC1/SC42 toward the development of international standards related to AI (METI)

⑤ Mobility

- Next-generation aircraft: Examined standards and specifications related to new environmental technologies (MLIT)
- Next-generation vessels: Examined the formulation and revision of safety standards for hydrogen and ammonia-fueled ships (MLIT)
- Ports: Participated in the Permanent International Association of Navigation Congresses (PIANC) (MLIT)
- Formulated a railway technology standardization business plan (MLIT)
- Logistics: Promoted the dissemination of cold chain logistics service standards (MLIT)

⑥ Information and Communications

- Participated in standardization bodies (ITU, IOWN GF, etc.) regarding Beyond 5G (MIC)

- Established a "Business Development-Oriented International Standardization and Intellectual Property Strategy Task Force" at the Beyond 5G New Business Strategy Center to discuss standardization strategies and human resource development (MIC)
- Examined international standardization of wireless LAN technology using simultaneous broadcast communication methods (MIC)

⑦ Quantum Technology

- Developed a med- to long-term international standardization strategy and roadmap for quantum technology (METI)
- Hosted the IEC/ISO JTC3 (Quantum Technologies) General Assembly in Tokyo (METI)
- Acquired the position of convener of a working group at IEC/ISO JTC3 to discuss performance evaluation indicators and methods (METI)
- Examined standardization of quantum sensing materials and devices, and quantum computers (METI)
- Examined recommendations on a common framework for quantum cryptography signals (MIC)

⑧ Bioeconomy

- Examined international standards strategies for the biomanufacturing sector based on the "Bioeconomy Strategy" (METI)
- Conducted hearings with research and development project operators under the Green Innovation Fund and the Biomanufacturing Revolution Promotion Project, among others (METI)

⑨ Long-term Care and Welfare

- Developed an international standard on the quality of long-term care (ISO/FDIS 25557) (MHLW)
- Held discussions in the domestic committee corresponding to ISO/TC314 (Ageing societies) (MHLW)

⑩ Infrastructure

- Developed human resources in the BIM/CIM field (MLIT)
- Infrastructure base: Examined evaluation indicators for water reuse systems and test method standards for water treatment membranes (MLIT)

- Examined the establishment of an international standardization working group within the Japan-ASEAN Smart Cities Network Public-Private Council (JASCA) on smart cities (MLIT)
- Promoted standardization of ports and terminals (MLIT)
- Promoted collaboration with the international standards body OGC on geospatial information (MLIT)
- Formulated a draft international standardization strategy for construction machinery operations (MLIT)

⑪ Fusion Energy

- Established a framework within QST in collaboration with industry and academic societies (MEXT)
- Collaborated with the American Society of Mechanical Engineers toward international standardization (MEXT)
- Examined tokamak standards (MEXT)
- Examined the revision and initial drafting of structural standards for fusion energy systems, magnets, vacuum vessels, and related components (MEXT)
- Manufactured test materials necessary for promoting international standardization (MEXT)

⑫ Space

- Conducted hearings with the Japan Aerospace Exploration Agency (JAXA) and private sector operators in examining the content and timelines of international standardization activities (CAO, MEXT, METI)
- Promoted international standardization of GHG estimation methods using satellite data (MOE)
- Promoted international standardization of Arctic satellite navigation (MLIT)

⑬ Semiconductors

(No standardization activities by ministries and agencies were confirmed in the FY2025 follow-up.)

⑭ Materials

- Conducted research and development on measurement and evaluation methods related to analytical accuracy and reproducibility of advanced materials (MEXT)
- Collected and accumulated scientific knowledge contributing to international

standardization (MEXT)

- Examined international standardization of quantum sensing materials and devices (METI)

⑮ Resources

(No standardization activities by ministries and agencies were confirmed in the FY2025 follow-up.)

⑯ Ocean

- Led the international standardization of VDES (navigational equipment) for practical implementation, and the amendment to the SOLAS Convention Annex permitting shipboard installation was approved by the International Maritime Organization (IMO) (MLIT)
- Continued engagement in discussions on conventions and standards at IMO (MLIT)

⑰ Medical Care and Healthcare

- Engaged with ISO13485, IEC60601, and ISO10993 (MHLW)
- Pharmaceuticals: Responded to international pharmaceutical regulatory harmonization based on the "Pharmaceuticals and Medical Devices Agency 5th Medium-Term Plan" (MHLW)
- Examined international standardization of DX integrating healthcare and self-care processes (MHLW)
- Examined international standardization in the construction of medical data linkage infrastructure (MHLW)
- Participated as Vice-Chair in UNESCO discussions on Brain-Machine Interfaces (BMI) (CAO, MEXT)