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On 1 April 2019, Japan announced the new name for the reign of the next Japanese emperor.

Known as the ‘Reiwa era’, which translates to “beautiful harmony”, Japan hopes this new era will invigorate appreciation of the country’s cultural assets.

In this vein, the Australian Government, too, is working to raise the profile of Australia’s national assets in Japan. In 2018, the highly successful Australia now campaign showcased to Japan contemporary Australia at its finest. Celebrating Australian innovation, lifestyle and creativity, over 420,000 people across Japan participated in Australia now events, supported by the Australian Government.

Throughout 2019 and 2020, the focus will shift to promoting Australia’s sporting excellence to Japan.

Under the AUS+RALLY sports diplomacy banner, the Australian Embassy in Tokyo will collaborate with Rugby Australia, the Australian Olympic Committee and Paralympics Australia to celebrate Australia and Japan’s shared sporting passions and the values that sport unlocks.

As we approach the major rugby event in Japan, I encourage you to use this Engaging Japan: Business Guide for the Wallabies’ Rugby Fans in Japan 2019 to familiarise yourself with the opportunities that the Japan market presents for your organisation.

Engaging Japan: Business Guide for the Wallabies’ Rugby Fans in Japan 2019 has been produced to bring the Australian business community travelling to Japan for the rugby games up to speed with the current business environment during this exciting year.

As this guide shows, there is a groundswell of change taking place in Japan impacting how it engages with the world.

Japan, with Australia, took a lead in concluding the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP).

Japan is the biggest direct investor in Southeast Asia, a region where Japanese companies are increasingly setting up key export hubs.

Pressures from an ageing and shrinking population have put policy makers on the front foot to drive increased investments in R&D and innovate. Japanese companies, too, have turned away from a business-as-usual approach to embrace innovation and look overseas to drive new growth.

Japan’s political stability and rule of law also provide an attractive place to do business for many Australian companies across a broad range of sectors.
WHY SHOULD AUSTRALIAN BUSINESSES ENGAGE WITH JAPAN?

Japan is at the crossroads of a major reset as it moves to become more assertive on the global stage, promoting free trade and showcasing its technological know-how.

Economically, Japan is undergoing its longest economic expansion since World War II. Corporate profits are at record highs.

Politically, it is bucking international trends as the Abe Government enters its seventh-consecutive year in office, providing a foundation for consistent and stable domestic and international policies.

Outwardly, Japan is newly focused on leveraging its technological know-how, reputation for quality products and desirability as a tourist destination to exert its soft power globally.¹

‘Japan’s role in the global free trade system has changed from that of a participant to a leader in building 21st century common trade rules, as well as a coordinator and standard bearer of the entire system.’

–Toshimitsu Motegi, Minister for Economic Revitalisation

Abenomics, the economic policies advocated by Prime Minister Shinzo Abe, has evolved from emphasising fiscal-monetary reforms to broader goals based around Japan’s Society 5.0 initiative, which aims to unlock the growth potential of the country’s small and medium-sized enterprises (SMEs) and aggressively attract foreign investment.²

Inward investment at 4 per cent of GDP is the lowest in the OECD.³ By 2020, the government intends to attract A$440 billion⁴ in FDI stock.

Japan boasts the third-largest economy in the world and will host the world’s largest rugby event from September to November 2019. This event is billed as the world’s third-largest global sporting event, behind the Olympics Game and soccer World Cup.

Additionally, the Tokyo 2020 Olympic and Paralympic Games is being viewed in Japan as a transformative event that will shape the next stage of Japan’s economic and social evolution.

While analysts are forecasting a temporary boost to GDP as a result of hosting the games⁵, the government has longer term aspirations. Specifically, increasing the number of annual inbound visitors from the current 31 million in 2018 to 60 million by 2030.⁶

Japan is also pushing ahead with plans to open the country up to immigration and companies are increasingly hiring overseas professionals.

These moves are unprecedented in the country’s history and are largely the result of intensifying demographic pressures.

Japan’s working-age population has been declining since 1994 and birth rates are amongst the lowest in the OECD.⁷ At the same time, the Japanese Government is rethinking how technology, AI and big data can be utilised in the era of ‘the 100-year life’ to ease the strain on nursing care services and other welfare systems.⁸

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Taking stock of Japan

- Japan is on the verge of the longest economic expansion since World War II.13
- Japan maintains its status as the world’s third-largest economy.14
- Corporate balance sheets are in good health.
- Japan invested A$240 billion in R&D ranking third globally both as a portion of GDP and spend (2016).15
- Japan has more equal wealth distribution than any OECD country.16

Further fiscal pressure is being exerted by Japan’s national debt, which at 234 per cent of GDP is the largest of all OECD countries.10 (Eighty-eight per cent of that debt is held domestically by the Bank of Japan and other institutions in Japan.)

The government is planning to lift the consumption tax from the current 8 per cent to 10 per cent in October 2019 to raise revenue to fund new social welfare initiatives.

As well as developing its own leading edge technology, Japan is hoping to attract overseas state-of-the-art healthcare innovations to address the challenges presented by the country’s rapidly ageing population. The government is intent on Japan becoming a global pioneer for other countries, sharing its demographic and societal innovations and solutions.12

These tectonic shifts offer opportunities to Australian business community looking to enter the market or expand their presence.

By 2040, Japan’s population is projected to shrink by 15 per cent. The number of people over 65 years of age will peak at 40 million17, and Japan’s social welfare bill is forecast to increase by 60 per cent on current spending.6

Japan’s declining population in perspective

<table>
<thead>
<tr>
<th>Year</th>
<th>Country</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012-17</td>
<td>Stockholm</td>
<td>1,067,630</td>
</tr>
<tr>
<td>2017-22</td>
<td>Havana</td>
<td>2,222,131</td>
</tr>
<tr>
<td>2023-27</td>
<td>Madrid</td>
<td>3,070,546</td>
</tr>
<tr>
<td>2028-32</td>
<td>Berlin</td>
<td>3,623,532</td>
</tr>
<tr>
<td>2033-37</td>
<td>Los Angeles</td>
<td>4,081,318</td>
</tr>
<tr>
<td>2038-42</td>
<td>Melbourne</td>
<td>4,404,281</td>
</tr>
</tbody>
</table>
Japan by the numbers

**Country ratings**
- Standard & Poor’s: A+
- Moody’s: A1

**GDP**
- A$7,099 billion (No. 3 in the world)
  - Real GDP growth 2018: 0.9% (Y-on-Y)
  - Growth rate: 1.8%
  - Unemployment Rate: 2.4%

**Population**
- 126.7 million

**Japan is globally**
- the 4th largest exporter
  - A$972 billion (2017)
- the 4th largest importer
  - A$885 billion (2017)

**Japan is Australia’s 2nd largest two way trading partner**
- A$72 billion (2017) +17% (Y-on-Y)

**Japan is Australia’s 2nd largest export market**
- (goods and services total)
  - Top 3 export items
    1. Coal
    2. Iron ores and concentrates
    3. Beef
  - A$51 billion (2017-2018)

**Australia is Japan’s 3rd largest merchandise import source**
- Japan’s top 3 import sources
  1. China
  2. US
  3. Australia

**Japan is Australia’s 2nd largest foreign direct investor**
- A$93 billion (2017)

**Wealth**
- Average salary: A$57,620
- Median wealth: A$145,405 (1st in Asia)
- Household savings as a % of yearly income: 183.8%
- Household debt as a % of yearly income: 110%
- Millionaires in Japan (thousand): 2,809

**Japanese visitors to Australia**
- 469,200 (2018)
  - +36% from 2013 to 2017
  - Japan is the largest foreign investor in Southeast Asia with investment in Thailand over 40% of its FDI

**An R&D and education powerhouse**
- No. 1: in intellectual property for electrical machinery, apparatus, energy
- No. 2: number of patent applications (10.9% of global total)
- No. 3: OECD PISA rankings for maths, science and reading (average score)

**An enviable lifestyle**
- Safe Cities Index 2017 (Economist Intelligence Unit):
  1. Tokyo
  2. Osaka
  3. Kyoto
  4. Osaka
- Quality of Life (Monocle, 2018):
  1. Tokyo
  2. Tokyo
  3. Kyoto
  4. Osaka

**Household savings as a % of yearly income:**
- 110%

**Household debt as a % of yearly income:**
- 110%

**Millionaires in Japan (thousand):**
- 2,809

**Unemployment Rate:**
- 2.4%

**Growth rate:**
- 1.8%
Snapshot of Japan’s diversifying global expansions

- Japanese companies continue to aggressively pursue outbound merger and acquisition (M&A) deals with 2018 seeing the largest number of deals to date – a record 777 worth A$245 billion.35
- JGoodTech – operated by SME SUPPORT JAPAN within the Ministry of Economy, Trade and Industry – is a global business matching service provided to 7,000 SMEs in Japan to tap into overseas markets.
- The Japan Agency for Medical Research and Development has established a Global Research Council to advance R&D international alliances and position Japan as a leader in solving global health issues.36
- The National Institute of Advanced Industrial Science and Technology – Japan’s leading artificial intelligence (AI) research institute – is expanding its base of global partners to connect industry, academia and government to bring about ‘societal innovation’ through AI.37

Japan rolls out the welcome mat

From National Strategic Special Zones to Invest Japan Business Support Centres (IBSC), national and local governments are actively encouraging overseas companies of all sizes to establish a presence in Japan.

The IBSC is a one-stop shop run by Japan External Trade Organisation (JETRO), the central government related organisation promoting FDI to Japan. It provides information and support to overseas companies looking to establish offices in Japan. Offices are located in Tokyo, Yokohama, Osaka, Nagoya, Kobe and Fukuoka. Free temporary office space is available for up to 50 business days. Visit JETRO IBSC’s website for details.

Capitalising on Japan’s world-leading strengths in R&D, its highly skilled workforce, commitment to growing high value-added industries and an affluent consumer base, the Japanese Government is providing incentives to overseas companies38 that include:

- A range of tax credits, access to low-interest loans and other incentives for locating in, and/or making capital investments within regional revitalisation areas and special zones.39
- Free business consulting services such as developing growth strategies, analysing market surveys and finding business partners.
- Easing visa restrictions for skilled professionals.
- Streamlining administrative procedures to be globally competitive.

The Tokyo One-Stop Business Establishment Center (TOSBEC), operated by the Japanese Government and the Tokyo Metropolitan Government, assists overseas companies with the administrative paperwork required to set up an office in Japan. It is located on the same floor as JETRO IBSC. Visit TOSBEC’s website for details.

In addition to support provided by the central government, local governments offer other support services.

For example, the Tokyo Metropolitan Government provides additional free bilingual business concierge services prior to, during and after establishing a business in Tokyo at the Business Development Center Tokyo (BDCT)40 while the Osaka Business and Investment Center (O-BIC) provides tax and other incentives to establish a presence in Kansai.

Misconceptions about Japan

- Japan has burdensome regulations: In 2013, the National Strategic Special Zones law was passed to relax regulations and liberalise agriculture, medical care and energy41 in a bid to encourage foreign investment to Japan.
- Japan is expensive: According to The Economist’s 2019 Big Mac Index42, Japan is a cheaper country to shop in than the Eurozone, Australia, US and the UK. A 2016 McKinsey & Company report43 argued the perception of Japan being expensive was largely due to Japan not effectively marketing its affordability abroad.
- Innovation in Japan is stagnating: Japan is home to nine of the Thomson-Reuters’ Top 100 Most Innovative Universities in 201844 and 13 of its companies are listed in the Thomson-Reuters’ Top 100 Global Tech Leaders.45
Japan Society 5.0

In collaboration with the Japan Business Federation, the government is leading efforts to harness Japan’s technological strengths to create new value and services through innovation to address domestic and global challenges.

Under the Society 5.0 initiative, cutting-edge technology in healthcare, big data, autonomous vehicles, fintech, AI, Internet of Things (IoT), drones and robotics will be used to transform all aspects of the economy and society.

Key areas identified for Japan to take a lead include:

- **Super smart cities:** The Compact · Plus · Network will utilise autonomous systems and data sharing to give people more options as to where they can live and work. Decentralised micro-grids and off-grid energy using non-traditional sustainable energy mixes will support these communities.

- **Decarbonisation:** By 2030, an estimated 50-70 per cent of new automobiles in Japan will use electric, fuel cell or other non-gasoline engines. Japan has declared its plans to become a hydrogen-based society, establishing 320 commercially operating hydrogen stations by 2025.\(^4\)

- **Under the banner of Japan 2035: Leading the world through health** databases and next-generation high-speed communication networks will be deployed to pioneer remote diagnosis and treatment, telesurgery-telemedicine and AI to aid doctors.

- **Digitising farming:** Sensors, big data analysis and AI will be used to help farmers develop larger scale and less labour intensive spaces including integration of farmgate-to-store supply chains.

Japan – adapting to an ever-changing global environment

**Committing to free trade**
A consistent advocate of free trade, Japan commenced the Japan-Australia Economic Partnership Agreement (JAEP) in 2015, ratified the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) in 2018, and in February 2019, the EU-Japan Economic Partnership Agreement entered into force.

**Attracting investment**
Inbound foreign direct investment into Japan – particularly from Asia – continues to hit record highs with 70 per cent of foreign-affiliated companies assessing “Japan as a highly profitable market”.\(^1\)

**Supporting foreign workers**
In April 2019, for the first time ever, Japan opened its doors to unskilled foreign workers, offering a new Specified Skills Visa. The Japanese Government is aiming to attract up to 345,000 foreign workers over the next five years.\(^4\) The Japanese Government is aiming to host 60 million visitors by 2030.

**Hosting international events**
Japan is hosting major international sporting events including the Rugby World Cup 2019, 2020 Tokyo Olympics and Paralympics Games and the 2021 World Masters Games. In 2025, Japan will host the Osaka-Kansai Expo.

**Establishing integrated resorts**
In 2018, the Japanese Government passed a bill to legalise gambling casinos. Three major ‘integrated resorts’ are expected to commence operations by 2025.

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\(^1\) Engaging Japan: BUSINESS GUIDE FOR THE WALLABIES’ RUGBY FANS IN JAPAN 2019

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JAEPa and CPTPP. Optimising Australia’s trade agreements with Japan

Australia and Japan have two free trade agreements – the Japan-Australia Economic Partnership Agreement (JAEPA) and the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) – that provide preferential market access for Australian exporters.

The DFAT Free Trade Agreement Portal helps Australian exporters and importers identify the FTAs and markets that best meet their needs. Please check it for the best options for your product/service.

For example, when the CPTPP entered into force in December 2018, tariffs on grapes were eliminated. However, under JAEPA, tariffs on grapes will not be eliminated until April 2024.

Japan import tariffs on grapes: JAEPA vs CPTPP

![Diagram showing tariff rates over time for grapes under JAEPA and CPTPP]

- Base Rate (%) before FTA
- Tariff Rate (%) under JAEPA
- Tariff Rate (%) under CPTPP
Snapshot of innovation in Japan

Private sector initiatives

**KDDI Open Innovation Fund**
- **Size of fund:** A$377 million
- **Areas of focus:** AI, IoT, big data, AV/VR, healthcare, robotics, sports, entertainment, etc.

**Mitsubishi Estate EGG Japan and Tokyo 21c Club**
- **Areas of focus:** Supporting healthcare and IT venture companies and professionals by hosting over 200 annual events, business seminars and workshops. Additionally, providing offices that come with services to support business development and can accommodate business expansion.

**NTT Docomo Ventures**
- **Size of fund:** A$893 million
- **Areas of focus:** Building partnerships with startups that possess technologies to create new innovations.

**Fujifilm Open Innovation Hub**
- **Areas of focus:** Providing business partners with first-hand experience of technologies and products under development by the Fujifilm Group to co-create and collaborate. Fujifilm Open Innovation Hubs are located in Tokyo, the Netherlands and Silicon Valley.

**NTT Data Open Innovation**
- **Areas of focus:** Generating win-win business scenarios by bringing together three groups: startups with the most advanced technologies and business solutions, big corporations from a range of industries, and NTT DATA itself.

**MUFG Innovation Hub**
- **Areas of focus:** Fintech, blockchain, robotics, AI and other cutting-edge technologies. MUFG Digital Accelerator assists with business plans, prototype building and business matching.

Public sector initiatives

**J-Startup**
A Ministry of Economy, Trade and Industry initiative combining public and private sector resources to assist 10,000 Japanese startups expand globally. It also assists overseas startups gain entry to the market by providing information and administrative support.

**Startup Fukuoka**
Fukuoka is a designated National Strategic Special Zone for global startups via the Global Startup Center. In addition to tax breaks and visa support for overseas startups, staff fluent in English are on hand to provide comprehensive support.

**Tokyo Startup Gateway**
An initiative to transform Tokyo into a global hub for entrepreneurship by supporting the startup ecosystem as a whole. From the ideation stage to fundraising and crowdfunding to improving team innovation, the Tokyo Metropolitan Government is aiming to provide a broad range of support services.

**Osaka Innovation Hub**
Designed to take the disruptive ideas of entrepreneurs and technologists to the world, the Osaka Innovation Hub (OIH) holds some 200 programs annually to scale up startup operations. OIH also holds workshops in Silicon Valley.

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**Engaging Japan: BUSINESS GUIDE FOR THE WALLABIES’ RUGBY FANS IN JAPAN 2019**
**Japan – gateway to the world**

Tokyo has direct flights to Sydney, Melbourne, Brisbane, Gold Coast, Cairns and Perth (from September 2019), and Osaka to Sydney and Cairns. From December 2019, seasonal direct flights from Sydney to Sapporo are also scheduled to commence.

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**Flight times to major cities from Tokyo International Airport**

<table>
<thead>
<tr>
<th>City</th>
<th>Flight Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sydney</td>
<td>9hr 30min</td>
</tr>
<tr>
<td>Perth*</td>
<td>10hr 10min</td>
</tr>
<tr>
<td>Seoul</td>
<td>1hr 55min</td>
</tr>
<tr>
<td>Shanghai</td>
<td>2hr 30min</td>
</tr>
<tr>
<td>Singapore</td>
<td>6hr 55min</td>
</tr>
<tr>
<td>London</td>
<td>11hr 50min</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>10hr 00min</td>
</tr>
<tr>
<td>Brisbane</td>
<td>9hr 00min</td>
</tr>
<tr>
<td>Kuala Lumpur</td>
<td>7hr 15min</td>
</tr>
<tr>
<td>Tokyo</td>
<td>10hr 00min</td>
</tr>
<tr>
<td>Melbourne</td>
<td>10hr 30min</td>
</tr>
<tr>
<td>Beijing</td>
<td>3hr 05min</td>
</tr>
<tr>
<td>Bangkok</td>
<td>6hr 10min</td>
</tr>
<tr>
<td>Taipei</td>
<td>2hr 40min</td>
</tr>
<tr>
<td>Sydney</td>
<td>9hr 15min</td>
</tr>
<tr>
<td>Brisbane</td>
<td>9hr 00min</td>
</tr>
<tr>
<td>San Francisco</td>
<td>9hr 15min</td>
</tr>
</tbody>
</table>

* from September 2019
WHERE IS THE ACTION
FOR THE LARGEST RUGBY EVENT IN 2019?

Japan consists of 47 prefectures each with their own unique charms, cultural, dialectal and culinary traditions.

International Comparison of regional GDP in Japan
(nominal, FY 2015)

(Unit: US$1 billion)

- **Hokkaido / Tohoku region**: 513.6 (Sweden: 497.9)
- **Chubu region**: 708.8 (Netherlands: 758.0)
- **Chugoku region**: 249.1 (Finland: 232.5)
- **Kyushu region**: 408.8 (Belgium: 455.2)
- **Kanto region**: 1,858.8 (Italy: 1,832.9)
- **Kansai region**: 692.7 (Switzerland: 679.3)
- **Shikoku region**: 118.0 (Hungary: 122.9)
Tokyo and the Kanto region
Kanto is located in the eastern part of Honshu, the main island of Japan, and is home to Japan’s capital, Tokyo. The region represents Japan’s largest urban agglomeration and is the major hub for Japan’s business and political activity, accounting for 45 per cent of Japan’s GDP. Forty per cent of the population lives here in just 19 per cent of Japan’s landmass.\(^5\) The population in the Tokyo metropolitan area has grown for 23 consecutive years up to 2018.\(^6\)

TOKYO
Hosting Australia v Wales match on 29 September
Tokyo is a financial centre containing a variety of industries, including a large concentration of the headquarters of Japanese corporates. Tokyo is also an international business hub: 75 per cent of overseas companies are located here.\(^5\)

YOKOHAMA
Hosting semi-final matches on 26-27 October and final matches on 1-2 November
Yokohama is the second-most populous city in Japan. Designated as the Life Innovation Comprehensive Special Zone for International Competitive Development by the government, Yokohama is developing biotechnology and life sciences industries by forming R&D centres and bioclusters. It also has a concentration of IT companies and is ranked in the top 5 cities in Japan.\(^6\)

Sendai and the Tohoku region
Tohoku, in Japan’s northeast, rose to world prominence in March 2011 when the Great East Japan Earthquake devastated the Pacific Coast. Even though recovery efforts are still in progress, production in manufacturing, agriculture and other key sectors has largely returned to pre-disaster levels.\(^6\)

The capital city of Sendai is home to numerous universities and R&D clusters, including the world’s most advanced next generation semiconductor memory R&D centre.\(^4\)

As with the rest of Japan, Tohoku has benefited from an influx of international tourists. Numbers grew by 49 per cent in 2017 on the previous year reaching 966,860 visitors.\(^6\)

Easy access by bullet train from Tokyo, World Heritage sites, abundant natural beauty and iconic festivals make Tohoku an attractive destination.

Osaka and the Kansai region
With Osaka at its economic centre, Kyoto to the north and the port city of Kobe to the west, Kansai is home to 22 million people – 17 per cent of Japan’s total - and 16 per cent of Japan’s total GDP.\(^5\)

Manufacturing in Kansai accounts for 20 per cent of the region’s GDP.\(^4\)

Kansai is one of the major hubs for the pharmaceutical industry, boasting large numbers of medical equipment manufacturers, medical research institutions and foreign medical companies. Some 23 per cent of industry-university joint research in Japan is conducted in Kansai, earning the region a reputation for life-science innovation.\(^5\)
Kansai’s economy has seen a growth in services exports – specifically the region’s major tourism assets of Kyoto, Nara and Kobe, with 17.7 million inbound visitors. It is the second-most visited destination after the Kanto region.

**Sapporo and the Hokkaido region**
Located in the northernmost part of Japan, Hokkaido is an important food supply region. It comprises one-fourth of Japan’s farmland and accounts for 13 per cent of Japan’s gross agricultural production and 20 per cent of its fishing industry.

The economy is supported by strong agricultural exports and record inbound tourist numbers. GDP growth returned to positive levels for the quarter ending June 2018.

Tourism is becoming an important industry in Hokkaido. The combined number of domestic and international tourists reached a record high of 56 million in 2017-18.

The growth in international inbound tourism is providing a much needed economic boost with the number of reaching 2.8m in 2017-18, up 21 per cent from 2016-17.

Inbound tourism growth is largely driven by low cost carrier access from Asia. Australian tourist numbers continue to remain strong particularly in winter due to Hokkaido’s famed powder snow.

**Fukuoka and the Kyushu region**
Kyushu remains home to many of Japan’s largest heavy industry production plants. Kyushu’s economy has enjoyed four years of growth, most recently at a pace greater than the national average.

One hundred and twenty-three publicly listed companies are headquartered in Kyushu. Of these, 29 have sales in excess of A$1 billion.

Kyushu is one of Japan’s leading regions for steel, automotive and semi-conductor production, as well as shipbuilding.

Kyushu is also a large agricultural producer, accounting for 39.3 per cent of Japan’s beef cattle production, 28 per cent of pork production and 47.7 per cent of chicken meat production.

**OITA**
**Hosting Australia v Uruguay match on 5 October**
Oita is an industrial city with iron and steel, oil, chemicals, shipbuilding, semiconductors, automobiles the main industries. In recent years, Oita has been focusing on establishing new industries, such as alternative energy, medical equipment and food manufacturing.

**SAPPORO**
**Hosting Australia v Fiji match on 21 September**
Sapporo is Hokkaido’s economic and logistics hub. It is home to numerous universities and public research institutions, and has an international port and international airport.
Business culture and etiquette

> **Quality and reliability**: Japanese consumers demand quality and reliability and spend more of their disposable income on consumer goods than other comparable markets. Japan has made a name for itself as a nation of quality and innovation and has staked its future on this value proposition.

> **Prepare to adapt your product**: Japan is a highly competitive market and exporters should be ready to adapt products to suit the market requirements. Australian companies offering unique Australian-made products which are not readily available in Japan will have a higher chance of success in Japan.

> **Patience with decision making**: Decision making in Japan is slower than in Australia. Be patient. Once Japanese people make a decision to do business with you, things will move quickly. This comes with a strong commitment and loyalty to selected business partners.

> **Japanese politeness**: It can be difficult to understand the true thoughts of Japanese business people because of their politeness. They may praise your product, which would lead you to assume that the negotiations went well. In reality, however, they may not be interested in doing business. You can minimise the chance of any misunderstanding by having a local person who understands Japanese business culture interpret for you.
Punctuality: Punctuality is a must. It is usual to arrive at a meeting 10 minutes ahead of time. If you are arriving late, it is polite to call ahead to inform the approximate time of arrival.

Business cards: Business meetings begin with the exchange of business cards. They are given and received with both hands and laid respectfully on the table. If time allows, have your business cards printed in English on one side and Japanese on the other.

Modesty: Japanese are polite and place importance on respecting age and social rank. You may be showered with extensive compliments while your host remains humble and plays down their achievements.

Gentle approach: Japanese try to avoid open conflict and prefer more gentle and persuasive presentations in meetings.

Speak clearly: English is not widely spoken, with some exceptions such as trading houses. If a meeting is conducted in English, be sure to speak slowly and clearly and avoid Australian idioms and jokes. If you are using an interpreter, make sure to brief them in advance about your business and what you are going to discuss.

Gifts: Not necessary. It is inappropriate to offer expensive gifts, particularly on first meetings; corporate promotional gifts, however, are acceptable.

Building relationships: Breakfast meetings before 9.00 am are uncommon. After 5.00 pm get togethers over drinks or meals are more common. Relationship building is important. Relationships are often developed through informal social networking.

Dress code: Dress codes vary between industries, but Japanese tend to dress more formally and conservatively than Australians. More companies in Japan are lately adopting casual office dress codes. During the summer months in particular, dress codes are being relaxed in many companies with so-called “Cool-Biz” – a campaign initially introduced by the Japanese Ministry of Environment that permits employees to remove their neckties, for example.

‘It doesn’t happen overnight. You need to establish a level of trust (with the Japanese), and it takes a lot of time.’
– Ray Power, General Manager, Nutrigreen Australia

‘If you’re living here, you’re living in their territory, so you need to abide by the rules, and understand their culture, even if you can’t speak Japanese. The main thing is to respect the culture that they have.’
– Frank Hart, President, Harnet Corporation
Getting your product to market

It is important to understand the various channels available in the Japanese market to sell products and determine the best entry point by conducting careful research.\(^7\)

<table>
<thead>
<tr>
<th>Using an agent</th>
<th>Using a distributor</th>
<th>Direct export</th>
<th>Online selling</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generally cheaper than a distributor.</td>
<td>You can pass a great degree of risk onto them.</td>
<td>Greater control of all aspects of the process including sales and marketing.</td>
<td>In 2018, 72 per cent of Japanese consumers purchased products online.</td>
</tr>
<tr>
<td>You have a greater control over terms of sale and marketing, and choice of customers to deal with.</td>
<td>A distributor has greater incentive to sell your product as they also have to cover the costs of holding stock.</td>
<td>Better margins, as middle men are avoided.</td>
<td>Japanese shoppers are choosing cross-border online shopping to source products not readily available in stores.</td>
</tr>
<tr>
<td>Direct contact between manufacturer and customer.</td>
<td>Only have to monitor distributor’s accounts rather than all customers.</td>
<td>More direct customer relationships.</td>
<td>Opportunities for product segments that are uniquely Australian, supported by strong brand positioning or providing products not available in the Japanese market.</td>
</tr>
<tr>
<td>It may involve tax implications (check the relevant laws for that area).</td>
<td>Less control over marketing, terms of sale etc.</td>
<td>Need to involve yourself with every aspect of the export process, including market research, marketing, distribution and sales and receivables.</td>
<td>Cross-border penetration is relatively smaller than China and US.</td>
</tr>
<tr>
<td>Maintaining stock inventory can be costly.</td>
<td>The credit risk is with the distributor rather than with customers.</td>
<td>Knowledge of Japan-specific import licences, certifications, labelling, requirements, standards and testing requirements required.</td>
<td>Need to allocate budget to localise and develop Japanese language marketing information, usually via a service provider (with no guarantee of sales).</td>
</tr>
<tr>
<td>An agent may be selling products that compete with yours.</td>
<td>Distribution agreements regulated by local completion law.</td>
<td>High expectation for free, fast and reliable delivery in Japan – difficult to achieve in cross-border ecommerce.</td>
<td></td>
</tr>
</tbody>
</table>

Japanese companies’ connections throughout Asia, North America, Europe and other regions through local offices, supply chains and foreign direct investment make having a Japanese business partner a valuable asset for Japan and global markets.

‘If your business can make it in Japan, other markets open up and you are very well positioned to do business anywhere.’
– Paul Smith, CEO Shinka Management\(^7\)

Getting your message across

Getting the market mix right in Japan requires a high degree of localisation and local knowledge. Japan has followed the rest of the world in increasing internet penetration rates – reaching 94 per cent or 118.9 million people out of a population of approximately 127 million in 2019\(^7\) – but there are Japan-specific market characteristics that Australian companies need to be aware of when formulating marketing strategies.
Nearly 29,000 Japanese companies are more than 100 years old. Detailed historical storytelling plays a large part in marketing in Japan. Know how to pitch your story.

Quality is also a key theme. Japan is a highly service-oriented market. Highlighting attention to every detail proves a company’s credentials for quality and is instrumental in gaining consumer trust.

Other Japan-specific aspects of marketing to be aware of:

- **English is not commonly spoken in Japan:** While advancements have been made in English language learning, Japan ranks 49th in English proficiency, below many neighbouring Asian countries. English wording is used in Japanese advertisements to capture attention but it is not used to communicate messages.

- **Simply translating content from English to Japanese is not recommended:** Messaging that works for an English-speaking audience is not likely to resonate in Japan. For example, translating irony, puns and humour from English to Japanese will neither be understood nor appreciated. Japanese copywriters are best placed to tailor your company’s slogans and catchphrases in Japanese to suit your specific market segment and demographic.

- **Print advertising is still a commonly used medium in Japan:** Japanese are avid readers of print newspapers with Japan producing four out of 10 of the world’s top selling newspapers, two of which hold the number one and two spots. Advertising spend on traditional media is on the decrease and online advertising on the increase, however the former is still the dominant medium in Japan.

- **Factual objectivity in advertising is required by law:** Claims to “being the best” or the “most popular product in the market” must be evidenced with reliable statistical data under Japan’s Act Against Unjustifiable Premiums and Misleading Representations.

Some of the most common marketing channels and techniques used in Japan include:

**Websites:** Considered a digital business card, a website is an essential channel working as a foundation for any marketing approach. A high-quality and comprehensive website galvanises a customer’s decision about doing business with you. As social media or newsletters become popular customer engagement tools, a website functions as the landing page giving customers access to more detailed information. As the number of smartphone and tablet users is increasing, website design must be responsive to this. Not many Japanese read English, so a Japanese language website is essential.

**Social media:** Social media has become an essential marketing tool not only for B2C but also B2B in Japan. Many Japanese companies utilise at least one or multiple social media channels to promote their services and products. Successful social media channels are Facebook, Twitter, Instagram and LINE. Each platform has a strong offering with different target audiences and sectors, so you need to determine which channels will work most effectively for your services.

**Monthly Users by Social Media Service**

<table>
<thead>
<tr>
<th>Social Media Service</th>
<th>Monthly Users (Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>LINE</td>
<td>90</td>
</tr>
<tr>
<td>twitter</td>
<td>80</td>
</tr>
<tr>
<td>Instagram</td>
<td>70</td>
</tr>
<tr>
<td>facebook</td>
<td>60</td>
</tr>
<tr>
<td>Tik Tok</td>
<td>50</td>
</tr>
<tr>
<td>Pinterest</td>
<td>40</td>
</tr>
</tbody>
</table>

**Video marketing:** Social video marketing is increasingly accounting for a larger proportion of digital marketing in Japan. YouTube has become one of the most popular platforms for sharing information.

**Influencers marketing:** Celebrity endorsements and influencers are a powerful promotional tool. In Japan, social media influencers play an important role with customers. An influencer’s posting is shared widely in social media and multiplies the impact of an advertisement. Compared to other countries, Japan has the highest ratio of celebrities used in advertising.

**Sponsorship:** Purchasing sponsorship for events or providing samples of your products if they are already in the market is expensive but can help to increase brand awareness in Japan. Advertising through sponsorship of events could be an opportunity for logo placement, media exposure and outreach to the event’s audiences.
Getting your pricing right

Japan is very competitive. Customers want to know the price upfront or at least an indicative price of a product, so it is essential to have pricing determined before you approach the Japanese market.

Australian exporters are advised not to use Australian price points as a guide when setting prices for Japan. Instead, consider where you would like to be positioned in the Japanese marketplace – lower, middle or upper end – and then invest time researching the prices of competitors.

The best strategy is to identify the preferred price position in Japan and then work backwards to see if you can deliver the goods or services at that price.

Be sure to consider all the possible costs when exporting, such as shipping ex-factory to port of departure, air or sea freight and insurance, import duty and taxes etc.

For further information on export pricing and quotation in general, please visit Guide to exporting.

Getting local legal and tax advice

Seek professional advice from specialist service providers operating in the market.

Many international accounting and legal firms can provide an overview on the taxation system and legal framework in Japan including:

- PwC: Starting Business in Japan
- KPMG: Taxation in Japan
- Baker & McKenzie: Doing Business in Japan
- Asialink Business: Japan Country Starter Pack (paywall)
- The Japan External Trade Organisation (JETRO) also provides a paper on laws and regulations on setting up business in Japan:

So - are you ready for Japan?

<table>
<thead>
<tr>
<th>Readiness Checklist</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Are you prepared and committed to adopt a long-term view in terms of time, resources and funding?</td>
</tr>
<tr>
<td>□ Do you have buy-in from senior executives of your company?</td>
</tr>
<tr>
<td>□ Can you clearly and concisely present competitive advantage of your product/service in the Japan market?</td>
</tr>
<tr>
<td>□ Do you understand your competitors in the Japan market?</td>
</tr>
<tr>
<td>□ Have you identified an appropriate niche for your product/service?</td>
</tr>
<tr>
<td>□ Do you have specific data, product samples and sales sheets to support your pitch?</td>
</tr>
<tr>
<td>□ Have you selected a distribution channel and know why it is the best option for you product or service?</td>
</tr>
<tr>
<td>□ Have you developed a Japan marketing strategy?</td>
</tr>
<tr>
<td>□ Is your marketing collateral free of Australian references, measurements and slang?</td>
</tr>
<tr>
<td>□ Have you developed a professional website?</td>
</tr>
<tr>
<td>□ Have you developed a pricing strategy tailored to the Japan market in JPY?</td>
</tr>
<tr>
<td>□ Are your pricing terms explained in a clear language that Japan businesses will understand?</td>
</tr>
<tr>
<td>□ Have you examined the regulations in Japan that could affect your product or service?</td>
</tr>
<tr>
<td>□ Do you have knowledge about the Japan laws surrounding intellectual property, incorporation, product liability and contracts?</td>
</tr>
<tr>
<td>□ Do you understand the differences in business culture and etiquette between Japan and Australia and willing to accept them?</td>
</tr>
</tbody>
</table>

Visit the About Exporting section on the Australian Trade and Investment Commission website for more information on how to expand your business by exporting. This section provides a step-by-step guide to exporting.
The RWC 2019 will be played from 20 September to 2 November in 12 locations across Japan. It is the first time it has been played in Asia, in a region outside of rugby’s traditional heartlands. Some 1.8 million spectators are expected to attend, including 400,000 visitors from overseas.

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Schedule and locations of Australian matches, quarter-finals, semi-finals and final matches.

<table>
<thead>
<tr>
<th>Date</th>
<th>Match</th>
<th>Venue</th>
</tr>
</thead>
<tbody>
<tr>
<td>21 September</td>
<td>Australia v Fiji</td>
<td>Sapporo Dome, Hokkaido</td>
</tr>
<tr>
<td>29 September</td>
<td>Australia v Wales</td>
<td>Tokyo Stadium, Tokyo</td>
</tr>
<tr>
<td>5 October</td>
<td>Australia v Uruguay</td>
<td>Oita Stadium, Oita</td>
</tr>
<tr>
<td>11 October</td>
<td>Australia v Georgia</td>
<td>Shizuoka Stadium Ecopa, Shizuoka</td>
</tr>
<tr>
<td>19-20 October</td>
<td>Pool D Quarter Final 3</td>
<td>Oita Stadium, Oita</td>
</tr>
<tr>
<td>26-27 October</td>
<td>Semi Finals</td>
<td>International Stadium Yokohama, Yokohama</td>
</tr>
<tr>
<td>1-2 November</td>
<td>Finals</td>
<td>International Stadium Yokohama, Yokohama</td>
</tr>
</tbody>
</table>

For full match schedule, visit [RWC 2019 website](#).

The Japan National Tourism Organisation has a special travel guide website, [DISCOVER JAPAN](#) dedicated to rugby visitors with information on how to get to host cities, places to go, things to do and where to stay.

**Trade shows and business events**

If you are looking to conduct business activities while visiting Japan, see the [Appendix](#) detailing the list of key trade shows and business events during this time.
Weather
Plan well for this time of the year. The weather in early-September can still be hot and humid. Average temperatures and humidity start to drop from mid-September. October and November are the most pleasant months for travelling in Japan as the weather is mild.

<table>
<thead>
<tr>
<th>City</th>
<th>Sapporo</th>
<th>Tokyo</th>
<th>Osaka</th>
<th>Fukuoka</th>
</tr>
</thead>
<tbody>
<tr>
<td>SEP</td>
<td>Average (Daytime High)</td>
<td>22 C</td>
<td>27 C</td>
<td>29 C</td>
</tr>
<tr>
<td></td>
<td>Average (Nighttime Low)</td>
<td>14 C</td>
<td>21 C</td>
<td>21 C</td>
</tr>
<tr>
<td>Rainy Days</td>
<td>30-35%</td>
<td>35-40%</td>
<td>30-35%</td>
<td>30-35%</td>
</tr>
<tr>
<td>OCT</td>
<td>Average (Daytime High)</td>
<td>16 C</td>
<td>22 C</td>
<td>23 C</td>
</tr>
<tr>
<td></td>
<td>Average (Nighttime Low)</td>
<td>7 C</td>
<td>15 C</td>
<td>15 C</td>
</tr>
<tr>
<td>Rainy Days</td>
<td>35-40%</td>
<td>30-35%</td>
<td>25-30%</td>
<td>20%</td>
</tr>
<tr>
<td>NOV</td>
<td>Average (Daytime High)</td>
<td>8 C</td>
<td>17 C</td>
<td>17 C</td>
</tr>
<tr>
<td></td>
<td>Average (Nighttime Low)</td>
<td>1 C</td>
<td>10 C</td>
<td>10 C</td>
</tr>
<tr>
<td>Rainy Days</td>
<td>45%</td>
<td>20-25%</td>
<td>20%</td>
<td>25-30%</td>
</tr>
</tbody>
</table>

Passports and visas
An Australian passport that is valid for at least six months beyond the expected date of entry is required for travel to Japan. Visas are generally not needed for business trips of up to 90 days duration for Australian citizens, unless you are engaging in paid activities in Japan. For more details, please visit the [Japanese Embassy's website](https://www.infoembassy.com/).

Money
Japan’s currency is the Japanese Yen (JPY). The exchange rate is approximately: 1 AUD = 79 JPY as of 8 April 2019. For up-to-date currency conversions, visit [OANDA currency converter](https://www.oanda.com/).

Credit cards may not be widely accepted in Japan. You may be required to pay cash for taxis and some meals in restaurants, especially in regional Japan. Tipping is not required in Japan.

Many automatic teller machines (ATMs) in Japan do not accept credit, debit and ATM cards issued outside of Japan. You can withdraw cash at Japan Post ATMs and in the Seven Bank. Recently some Family Mart convenience stores have also added English language ATMs.

Mobile phones and wi-fi
Please check with your service provider before departing Australia to ensure that your mobile phone will work in Japan. There are also mobile phone rental options available through private providers, which allow mobile phones to be picked up from, and returned to Tokyo International Airport (Haneda), Narita International Airport and Kansai International Airport. Check the official [Japan National Tourism Organisation’s website](https://www.jnto.or.jp/) for how to access free wi-fi while in Japan.

Disaster Preparedness
Japan is prone to natural disasters such as earthquakes, tsunamis and typhoons. It is important to take appropriate steps to help keep safe:

1. Arrange travel insurance.
2. Register your trip on [Smartraveller](https://www.smartraveller.gov.au/) and follow the Australian Embassy Tokyo’s [Embassy Facebook](https://www.facebook.com/embassytokyoaustralia/) and [Twitter](https://twitter.com/EmbassyTokyo) feeds for updates.
3. Be prepared
   > Have an emergency kit on hand and keep your passport in a water tight (i.e. ziplock) bag.
   > [Safety Tips App](https://appstore.com/safetytipsapp) - this push-enabled alert app for international tourists provides information such as earthquake early warnings, tsunami warnings and other weather warnings within Japan in English. The app includes functions such as an evacuation flowchart showing actions to be taken in the event of a disaster, communication cards for obtaining information and useful website links.
   > [Tokyo Disaster Prevention App](https://www.engagejapan.com/) - For those in Tokyo, download the Tokyo Disaster Prevention App (select English when the app is initially opened). This app can provide locations of operating evacuation centres in a crisis.
   > Keep a list of emergency numbers handy.
   > Discuss a contingency plan with your family or travelling companions in case a disaster strikes.
   > Consider how you will keep family or friends in Australia informed of your welfare and whereabouts.
   > Be alert to early warnings. Follow the advice and instructions of local authorities.
Who can provide further support?

Consular services for Australian citizens living or travelling in Japan are provided by the Australian Embassy in Tokyo, Consulate-General Offices in Osaka and Fukuoka, and the Consulate in Sapporo.

If you require consular assistance, you should contact the nearest Australian mission.

Australian Embassy in Japan
03-5232-4111
Monday-Friday 9:00-12:30 and 13:30-17:00 (Excluding Embassy holidays)

Australian Consulate-General Osaka
06-6941-9271
osaka.japan@austrade.gov.au
Monday-Friday 9:00-17:30 (Excluding Embassy holidays)

Australian Consulate-General Fukuoka
092-734-5055
fukuoka.japan@austrade.gov.au
Monday-Friday 9:00-17:30 (Excluding Embassy holidays)

Australian Consulate Sapporo
011-242-4381
sapporo.japan@austrade.gov.au
Monday-Friday 9:00-17:00 (Excluding Embassy holidays)

24-hour consular emergency assistance is available for the cost of a local call in Japan on 03-5232-4111 or if calling from Australia, dial 1300 555 135.

Lifeline services in English:
Contact TELL: 03 5774 0992 (9am-11pm every day).

Local authorities in Japan
Emergency Services:
Police: 110
Fire and Ambulance: 119
Tokyo English-Speaking Police: 03 3501 0110
(Monday-Friday 8:30-17:15)

Australian Trade and Investment Commission (Austrade)

The Australian Trade and Investment Commission (Austrade) is the Australian Government’s international trade promotion and investment attraction agency.

We deliver quality trade and investment services to businesses to grow Australia’s prosperity. We do this by generating and providing market information and insights, promoting Australian capability, and facilitating connections through our extensive global network.

To discover how we can help you and your business visit austrade.gov.au or contact us at info@austrade.gov.au or on 13 28 78 (within Australia).

Austrade Tokyo (Kanto, Chubu and Tohoku regions)
Cheryl Stanilewicz, Trade Commissioner
P +61 3 5232 3930
E cheryl.stanilewicz@austrade.gov.au

Austrade Osaka (Kansai, Chugoku and Shikoku regions)
David Lawson, Senior Trade Commissioner and Consul-General, Osaka
P +61 6 6941 9409
E david.lawson@austrade.gov.au

Austrade Fukuoka (Kyushu region)
Ian Brazier, Trade Commissioner and Consul-General, Fukuoka
P +61 92 734 5055
E ian.brazier@austrade.gov.au

Austrade Sapporo (Hokkaido region)
Ron Green, Trade Commissioner and Consul, Sapporo
P +61 11 242 4381
E ron.green@austrade.gov.au
Japan External Trade Organization (JETRO)
JETRO is a government related organization promoting foreign direct investment into Japan and assisting Japanese firms’ overseas business including export and investment. JETRO provides business support services to overseas companies planning to setting up a base in Japan or foreign-affiliated companies already operating in the country and looking to expand their existing business base or to establish additional locations.

JETRO Headquarters, Tokyo
E  https://www.jetro.go.jp/en/contact.html
P  +81 3 3582 5511
W  www.jetro.go.jp/en

JETRO SYDNEY
E  https://www.jetro.go.jp/australia/contact.html
P  02 9002 6200
W  https://www.jetro.go.jp/australia/

Australian and New Zealand Chamber of Commerce in Japan (ANZCCJ)
ANZCCJ provides members with an effective source of information, representation and commercial connections. ANZCCJ holds a variety of events throughout the year, including meetings with visiting Australian and New Zealand Government leaders, industry experts and political figures, informative seminars and social networking evenings. For more info, contact the Chamber:
E  info@anzccj.jp
P  +81 3 4400 2972
W  www.anzccj.jp/

Who does what to assist your business

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Austrade</strong></td>
<td>General information (including in-market briefing) about exporting and doing business in Japan.</td>
</tr>
<tr>
<td></td>
<td>Tailored trade services* to export your product/service to Japan.</td>
</tr>
<tr>
<td></td>
<td>*market research, potential partners/customers identification, setting up meetings with potential partners/customers. Offered on a fee for service basis.</td>
</tr>
<tr>
<td></td>
<td>Support for Japanese companies to source goods and services from Australia or expand business to Australia.</td>
</tr>
<tr>
<td><strong>JETRO</strong></td>
<td>Support in setting up an office or expanding your business in Japan.</td>
</tr>
<tr>
<td></td>
<td>Find out about government incentives for setting up an office in Japan.</td>
</tr>
<tr>
<td></td>
<td>Support for importing product/service from Japan.</td>
</tr>
<tr>
<td><strong>ANZCCJ</strong></td>
<td>Build a business network in Japan and join the network of Australia/New Zealand-Japan community.</td>
</tr>
<tr>
<td></td>
<td>Promote your business and increase exposure in Japan.</td>
</tr>
<tr>
<td></td>
<td>Receive practical information related to doing business between Australia/New Zealand and Japan.</td>
</tr>
</tbody>
</table>
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