Report on EU-Japan Cluster & Region Cooperation

April 2020 - Réka Lóčzi
Acknowledgement

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The EU-Japan Centre for Industrial Cooperation (https://www.eu-japan.eu/) European Commission (Directorate-General for Internal Market, Entrepreneurship and SMEs; DG GROW) and the Japanese Government (Ministry of Economy, Trade and Industry; METI). The Centre aims at promoting all forms of industrial, trade and investment cooperation between the EU and Japan and at improving EU and Japanese companies’ competitiveness and cooperation by facilitating exchanges of experience and know-how between EU and Japanese businesses.

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Photo by: Kosuke Imagawa
Executive summary

This report is the result of a research conducted under the Minerva Fellowship scheme at the EU-Japan Centre for Industrial Cooperation. The objective of this report is to provide an analysis of the practices, successes and challenges of existing EU-Japan region-to-region, cluster-to-cluster and region-to-cluster cooperation, hereafter referred to as “region & cluster cooperation”. Moreover, this report will serve to give the EU-Japan Centre for Industrial Cooperation, hereafter referred to as “the Centre”, practical advice on ways to improve this type of cooperation. The scope of the research includes Japanese prefectures, EU regions, Japanese and EU regional agencies such as regional business/innovation/development agencies, Japanese and EU cluster organizations and networks, Japanese cluster promotion associations, municipalities, sector associations/consortia and R&D institutes.

Regions and clusters play an important role in the development of SMEs. Inter-regional and interclustering initiatives are a few of the many agents supporting SMEs to grow and internationalize, as SMEs in most cases do not have the network, the know-how and the resources to internationalize on their own. To support existing region & cluster cooperation to further industrial collaboration for SMEs, the research also aims to investigate the benefits for SMEs participating in EU-Japan region & cluster cooperation schemes. Hereby, the focus will be on cooperation within the field of regional innovation and business networks. The reason for this focus is that cooperation in regional innovation and business networks are one of the useful tools to enhance the quality of research output in both EU and Japan regions, thus enhancing the global competitiveness of both the EU and Japan as well as the SMEs participating in the cooperation schemes by developing solutions for industries and societal issues.

In order to provide an overview of the current state of region & cluster cooperation, a survey and multiple interviews have been conducted. Although this type of cooperation in the EU seems to be concentrated in countries with long-standing relationships with Japan and especially in Germany, a great potential for region & cluster cooperation has been identified. EU surveyed stakeholders from a variety of industries that do not have any region & cluster cooperation with Japanese entities as of the moment, are generally interested in developing such cooperation activities. Moreover, Japanese surveyed and interviewed stakeholders from a variety of industries who have ongoing region & cluster cooperation activities are generally interested in expanding their activities through cooperation with other EU entities.

The main findings on the analysis of the practices, successes and challenges of existing EU-Japan region & cluster cooperation and the benefits of SMEs within these cooperation schemes are the following: 1) EU-Japan region & cluster cooperation involving SMEs most often come in the form of region-to-region, cluster-to-cluster and region-to-cluster cooperation; 2) all case studies are positive about their cooperation schemes with their EU or Japanese counterpart; 3) challenges most commonly mentioned by both Japanese and EU survey respondents and interviewees are a lack of funding, cultural differences and a language barrier; 4) benefits for SMEs as mentioned most commonly by Japanese and EU interviewees are their development and their increased opportunities for internationalization.

Ways to improve these types of EU-Japan region & cluster cooperation has been identified through the same survey and interviews as mentioned above. General recommendations for the Centre would be to focus on the creation of partnering opportunities by organizing events, an online platform, etc. while enhancing the supply of logistical support and market information for especially Japanese stakeholders and providing training programs to better understand the Japanese counterpart to a broader range of participants for EU stakeholders.
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<td>BMBF</td>
<td>Bundesministerium für Bildung und Forschung: Federal Ministry of Education and Research, Germany</td>
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<td>CEEJA</td>
<td>Centre Européen d’Etudes Japonaises d’Alsace: European Centre for Japanese Studies in Alsace, France</td>
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<td>CF</td>
<td>Cohesion Fund</td>
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<td>EAFRD</td>
<td>European Agricultural Fund for Rural Development</td>
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<td>EC</td>
<td>European Commission</td>
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<td>ECCP</td>
<td>European Cluster Collaboration Platform</td>
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<td>EEN</td>
<td>Europe Enterprise Network</td>
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<td>EIT</td>
<td>European Institute of Innovation and Technology</td>
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<td>EJRC Helpdesk</td>
<td>EU-Japan Regional Cooperation Helpdesk</td>
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<td>EMFF</td>
<td>European Maritime and Fisheries Fund</td>
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<td>ERDF</td>
<td>European Regional Development Fund</td>
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<td>ESF</td>
<td>European Social Fund</td>
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<td>ESIF</td>
<td>European Structural Investment Fund</td>
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<td>EPA</td>
<td>Economic Partnership Agreement</td>
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<td>EU</td>
<td>European Union</td>
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<td>HCNF</td>
<td>Healthcare New Frontier</td>
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<td>INOEL</td>
<td>Innovation Center for Organic Electronics</td>
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<td>JCC</td>
<td>Japan Cosmetic Center</td>
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<tr>
<td>JETRO</td>
<td>Japan External Trade Organization</td>
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<tr>
<td>JST</td>
<td>Japan Science and Technology Agency</td>
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<tr>
<td>MAFF</td>
<td>Ministry of Agriculture, Forestry and Fisheries</td>
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<td>METI</td>
<td>Ministry of Economy, Trade and Industry</td>
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<td>MEXT</td>
<td>Ministry of Education, Culture, Sports, Science and Technology</td>
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<td>MIC</td>
<td>Ministry of Internal Affairs and Communications</td>
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<td>MOFA</td>
<td>Ministry of Foreign Affairs</td>
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<td>MoU</td>
<td>Memorandum of Understanding</td>
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<tr>
<td>NUTS</td>
<td>Nomenclature of Territorial Units for Statistics</td>
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<tr>
<td>OECD</td>
<td>Organisation for Economic Co-operation and Development</td>
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<td>OES</td>
<td>Organic Electronics Saxony</td>
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<td>RIM Plus</td>
<td>Regional Innovation Monitor Plus</td>
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<td>SPA</td>
<td>Strategic Partnership Agreement</td>
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<td>WHO</td>
<td>World Health Organization</td>
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<td>YU-FIC</td>
<td>Yamagata University Flexible Electronics Japan-Germany International Collaborative Practical Utilization Consortium</td>
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<td>YU-FOC</td>
<td>Yamagata University Flexible Organic Electronics Practical Key Technology Consortium</td>
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1. Introduction

1.1 Background and aim of the report

Japan and the EU have developed a solid diplomatic and trading relationship since the 1990’s. With respect to industry cooperation, a Regulatory Cooperation Joint Agreement was adopted in 2015, and in technology cooperation, an EU-Japan Science and Technology Cooperation Agreement was signed in 2009\(^1\). On 17 July 2018, the Economic Partnership Agreement (EPA) between the EU and Japan was signed. It is the biggest trade deal that the EU has signed to date and represents nearly 30% of global GDP and 40% of global trade. It is also the largest open-trade zone in the world, covering 600 million people\(^2\). The cooperation allows for better mutual understanding of respective policies, including those related to small businesses and government procurement\(^3\). Negotiations for this EPA opened on 29 November 2012, in parallel to the negotiations between the EU and Japan on a Strategic Partnership Agreement (SPA), which was also signed on 17 July 2018. This partnership agreement is the first-ever bilateral framework agreement between the EU and Japan and aims to ensure closer political and economic cooperation on a whole host of bilateral, regional and multilateral issues\(^4\).

Another partnership signed recently between the EU and Japan is the Partnership on Sustainable Connectivity and Quality Infrastructure. This partnership was signed on 27 September 2019 and portrays the willingness of the EU and Japan to work together on all dimensions of connectivity, bilaterally and multilaterally, including digital, transport, energy, people-to-people exchanges and EU-Japan cooperation in third countries\(^5\). Moreover, Japan and the EU also signed Japan and the EU also cooperate in research and innovation through a co-funding scheme under The Japan Science and Technology Agency (JST) and Horizon 2020\(^6\).

In this context, the EU-Japan Centre for Industrial Cooperation, which promotes all forms of industrial, trade and investment cooperation between the EU and Japan, seeks to promote EU-Japan region & cluster cooperation and EU-Japan cooperation in third countries, fully exploiting the abovementioned partnership agreements\(^7\).

Meanwhile, the European Center for Japanese Studies in Alsace (CEEJA) in the EU, together with the prefectures of Gifu and Iwate in Japan recently developed the EU-Japan Regional Cooperation Helpdesk (EJRC Helpdesk). The objective is promoting cooperation in terms of industry, trade, investment, innovation, tourism, and people mobility, through a platform mobilizing EU regions and

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\( ^1 \) European Cluster Collaboration Platform, 2019: “Discussion paper on Japan”, pp. 4-10  

\( ^2 \) EU-Japan Centre for Industrial Cooperation: EU-JAPAN TRADE DEAL: INTERVIEWS BY THE EU-JAPAN CENTRE GENERAL MANAGER, EU-Japan Centre for Industrial Cooperation website:  

\( ^3 \) European Commission: EU – Japan cooperation, EC website:  
https://ec.europa.eu/growth/industry/international-aspects/cooperation-governments/eu-japan_en

\( ^4 \) EUR-Lex: EU-Japan Strategic Partnership Agreement, EUR-Lex website:  
https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=LEGISSUM%3A4359401

\( ^5 \) Ministry of Foreign Affairs (MOFA) of Japan: THE PARTNERSHIP ON SUSTAINABLE CONNECTIVITY AND QUALITY INFRASTRUCTURE BETWEEN JAPAN AND THE EUROPEAN UNION:  

\( ^6 \) European Cluster Collaboration Platform, 2019, pp. 4-10

\( ^7 \) EU-Japan Centre for Industrial Cooperation: EU-JAPAN TRADE DEAL: INTERVIEWS BY THE EU-JAPAN CENTRE GENERAL MANAGER
clusters and Japanese prefectures and clusters. Cooperation will be bilateral between European and Japanese stakeholders, but it may also include EU with Japan jointly operating vis-à-vis in third countries, e.g. in Africa and South East Asia, Latin America and the EU’s neighbouring countries⁸.

Against this backdrop, it is important to understand the current state of EU-Japan region & cluster cooperation and EU-Japan cooperation in third-countries. This report will focus on the state of EU-Japan region & cluster cooperation. To assure this report will provide the Centre with a practicable overview and advice, the research will be split up into an introductory chapter, an analytical chapter and an advisory chapter.

The introductory chapter of this study will draw the background of the report. It will discuss cluster and regional development policies, programmes, initiatives, important bodies and stakeholders in the EU as well as in Japan. While this part of the report includes many examples that can serve as an inspiration for the development and implementation of cluster policies and programmes, it will not cover all forms of cluster and regional development policies, programmes, etc. It should be seen as a practical toolbox with new ideas and material.

The analytical chapter of this study will consist of both primary and secondary research and it will mainly serve as a base for further analysis and as a base for the advisory part of the study. First, it will identify general interest, practices and case studies in EU-Japan region & cluster cooperation. Some case studies are highlighted based on the benchmarking of measurable results of the cooperation concerned. Second, it will map out 1) underlying drivers for EU-Japan region & cluster cooperation and 2) challenges faced during EU-Japan region & cluster cooperation and 3) benefits of EU-Japan region & cluster cooperation for SMEs involved.

The advisory chapter of this research will deal with the provision of advice on how the EU-Japan Centre for Industrial Cooperation can adjust its services to better serve EU and Japanese SMEs, regions/prefectures and clusters involved in or interested in EU-Japan region & cluster cooperation.

1.2 Methodology

The methodology used for the study, included the review of existing online reports, the conduction of a survey and interviews with Japanese and EU stakeholders.

In order to create a better understanding of the current state of regional development and cluster policy frameworks within the EU and Japan and to create a backdrop for this research, an empirical research on available official reports and relevant websites of the European Commission (EC) and several ministries of the Japanese government has been conducted.

Thereafter, a survey was conducted in order to identify and to gather information about ongoing EU-Japan region & cluster cooperation. All stakeholders’ responses to the survey were gathered to constitute the database of the following report. Partnerships identified by the European Cluster Collaboration Platform (ECCP) that are not identified by the survey are included in the analytical chapter as well. Case studies highlighted in this report were selected based on their relevance, an

⁸ EU-Japan Centre for Industrial Cooperation: WHAT THE EJRC HELPDESK CAN DO FOR YOU, EU-Japan Centre for Industrial Cooperation website: https://www.eu-japan.eu/eu-japan-regional-cooperation-helpdesk
existence of strong interest in long-term continuation of the cooperation and the involvement of SMEs in the cooperation activities.

Finally, the standardized support services demand as filled in by the survey respondents was mapped against the services offered by the Centre to form the basis for the advisory chapter. It also highlights the most relevant customized requests given during the survey and the gaps between the supply and demand of support services offered by the Centre. This should then facilitate the Centre to adapt its support services for especially the newly created EJRC Helpdesk according to these findings.

1.3 Definition of clusters and regions

1.3.1 Clusters

The general definition for a cluster used in the EU is “a group of firms, related economic actors, and institutions located in a specific geographic area and has reached a sufficient scale to develop specialized expertise, services, resources, suppliers and skills”. Clusters are referred to both as a concept and a real economic phenomenon and an example could be Silicon Valley in California, US.

The Japanese definition of a cluster is somewhat vague compared to the definition of clusters in the EU. Some Japanese (cluster) organizations however, do match the EU equivalent as of definition and activities. In Japan’s case, most of the cluster structures could be described as a R&D centre that will coordinate collaboration between private companies, universities and public entities in order to realize a specific research projects for a limited time that usually funded by public funds. It is often believed that because Japanese clusters work towards a very specific goal within a given project on a short term. Another type of clusters in Japan is acting more as a communication network, such as consortia for a specific industry with the aim to share information and do not have any actual physical entity. Furthermore, some regional areas with a concentration of companies operating within a within a specific sector are considered as industrial clusters. Although they do not have a cluster organization to coordinate all companies, they are supported by local or regional development agencies. In some cases, Regional Industrial Promotion Agencies are the bodies that support such companies in their internationalization process by a cluster department within the agency entity through services provided via the internet. These agencies themselves often rely on cooperation with regional Ministry of Economy, Trade and Industry (METI) offices or on the Japan External Trade Organization (JETRO) for international cooperation programmes.

1.3.2 Regions

The definition of regions as used for the EU refers to the current 'Nomenclature of Territorial Units for Statistics' (NUTS) 2016 classification levels 1 and 2. The NUTS classification is a hierarchical system for dividing up the economic territory of the EU and the UK for the purpose of: 1) the collection, development and harmonization of European regional statistics, 2) socio-economic analyses of the

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10 EU-Japan Centre for Industrial Cooperation: HIGH TECH CLUSTER SUPPORT, EU-Japan Centre for Industrial Cooperation website: https://www.eu-japan.eu/high-tech-cluster-support
regions, and 3) framing of EU regional policies\textsuperscript{11}. The system was drawn up by Eurostat (the statistical office of the European Union) and is being used in EU legislation since 1988\textsuperscript{12}.

The NUTS classification subdivides each Member State into regions at three different levels, covering NUTS 1, 2 and 3 from larger to smaller areas:

- NUTS 1: major socio-economic regions
- NUTS 2: basic regions for the application of regional policies
- NUTS 3: small regions for specific diagnoses

It should be noted that the current NUTS 2016 classification is valid until 1 January 2021. From then, that there will be a newer classification: the NUTS 2021 classification\textsuperscript{13}.

The definition of regions as used for Japan refers to the 47 prefectures under the prefecture system as established by the Meiji government. This system was established in 1871 and consisted of initially over 300 prefectures, but this number was reduced to 72 in the latter part of 1871, and 47 in 1888\textsuperscript{14}.

### 1.4 Policy overview

#### 1.4.1 Background

Inside and outside of the EU, policies and strategies supporting clusters and regional development are common. In the EU, cluster policies and strategies are designed and implemented according to each regions specific context, following specific government policies that facilitate the creation, development and dynamics of clusters and cluster initiatives\textsuperscript{15}. Outside Europe, objectives sometimes go beyond competitiveness. In Japan, SME support and innovation are high on the agenda like in the EU, but at the same time, there is a bigger emphasis on achieving regional development\textsuperscript{16}.

The next sections of the report will give an overview of the cluster programmes and initiatives and regional development policies. While it includes many examples, it will neither cover all forms of policies, programmes or initiatives.

\textsuperscript{11} Eurostat: NUTS - NOMENCLATURE OF TERRITORIAL UNITS FOR STATISTICS, BACKGROUND, Eurostat website: https://ec.europa.eu/eurostat/web/nuts/background


\textsuperscript{13} Eurostat: NUTS - NOMENCLATURE OF TERRITORIAL UNITS FOR STATISTICS, BACKGROUND


\textsuperscript{15} European Commission Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, 2016. “Smart Guide to Cluster Policy, Guidebook Series How to support SME Policy from Structural Funds”, pp. 11-13

\textsuperscript{16} European Observatory for Clusters and Industrial Change, 2019. “Cluster programmes in Europe and beyond”, pp. 65-69
1.4.2 Cluster policies and initiatives in the EU and in Japan

EU

The EC doesn’t have an overarching cluster policy for all of its member-states. Member-states have their own national as well as regional policies and programmes in support of clusters, but this section of the report will only discuss initiatives on the EU level due to the length of this report.

The EC encourages the application of best practices from one member-state to other member-states to ensure a European “added value” to what is going on at national level. Furthermore, the EC aims for the improvement of the understanding of cluster development in the EU in general and wishes high quality services to be available to clusters.

Against this background, there have been launched several cluster support initiatives for cluster development. Three main goals of these initiatives are 1) investing in cluster excellence, 2) promoting cluster collaboration and 3) creating cross-sectoral value chains.

Initiatives supporting the first goal, investing in cluster excellence, are for example the Knowledge and Innovation Communities by the European Institute of Innovation and Technology (EIT) and the Cluster Excellence Programme by Competitiveness of Enterprises and Small and Medium-sized Enterprises (COSME).

Initiatives supporting the second goal, promotion of cluster collaboration, are for example the European Cluster Collaboration Platform (ECCP), the Cluster Internationalization Programme (COSME) and the European Strategic Cluster Partnerships (under COSME) and Interreg (ESIF).

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17 European Commission Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, 2016, pp. 18
20 Knowledge and Innovation Communities by the European Institute of Innovation and Technology: Knowledge and Innovation Communities, EIT website:  https://eit.europa.eu/our-communities/eit-innovation-communities
22 EU-Japan Centre for Industrial Cooperation Seminar Report, 2011, pp.5
23 European Cluster Collaboration Platform: A vibrant platform at the service of cluster organisations, ECCP website:  
24 European Cluster Collaboration Platform: Cluster Internationalisation, ECCP website:  
25 European Cluster Collaboration Platform: European Strategic Cluster Partnership for Going International, 
26 European Commission: Interreg : European Territorial Co-operation, EC website:  

Initiatives supporting the third goal, creation of cross-sectoral value chains, are the European Observatory for Clusters and Industrial Change\textsuperscript{27}, the S3 Platform\textsuperscript{28} and the Horizon 2020 INNOSUP Programme\textsuperscript{29}.

**Japan**

In Japan, the importance of regional innovation through scientific advancement has gained recognition because of the **industrial decline of Japanese regions caused by globalization**. As a reaction on this phenomena, national level cluster plans have been designed and implemented by the Japanese Government with the aim **increase innovation and eventually, to stimulate job creation**. The main actors in cluster policy making and the implementation of it are the Ministry of Economy, Trade and Industry (METI), the Ministry of Education, Culture, Sports, Science and Technology (MEXT) and regional or prefectural authorities\textsuperscript{30}. The Japan External Trade Organization (JETRO) is also an important actor in the Japanese regional and cluster landscape. In the following section initiatives by every main actor organization will be explained.

METI has developed the Industrial Cluster Policy, an initiative that aims to improve Japan’s competitiveness by forming industrial clusters and runs from 2001\textsuperscript{31}. MEXT likewise designed a cluster support policy called the Knowledge Cluster Initiative, which ran throughout 2002 until 2013 and was designed to cooperate with the Industrial Cluster Project of METI. MEXT also launched the Project for Developing Innovation Systems in 2010\textsuperscript{32}.

Although the majority of the abovementioned initiatives have ended, other financial supporting programmes that could be utilized by existing clusters have been launched more recently by several organizations. These programms are annually budgeted and aim to provide funding though incentives and subsidies in order to develop projects to improve regional industries. Examples are 1) the Regional Innovation Ecosystem Creation Programme supported by METI, MEXT, the Ministry of Agriculture, Forestry and Fisheries (MAFF) and the Ministry of Internal Affairs and Communications (MIC)\textsuperscript{33}; 2) the Regional Core Business Creation Support Programme supported by the Bureau of

\textsuperscript{27} European Cluster Collaboration Platform: European Observatory for Clusters and Industrial Change, ECCP website: https://www.clustercollaboration.eu/eu-initiatives/european-cluster-observatory
\textsuperscript{28} S3 Platform: https://s3platform.jrc.ec.europa.eu
\textsuperscript{33} Ministry of Education, Culture, Sports, Science and Technology: “地域イノベーション・エコシステム形成プログラムについて”: https://www.mext.go.jp/content/1413403_1.pdf
Economy, Trade and Industry in each respective region\textsuperscript{34}; 3) the Centre of Innovation Programme, supported by MEXT\textsuperscript{35} and 5) the Regional Tie-up Programme, supported by JETRO\textsuperscript{36}.

1.4.3 Regional development policies in the EU and in Japan

EU

In the EU, regional development policy aims to support job creation, business competitiveness, economic growth, sustainable development and to improve citizens’ quality of life and is the EU’s main investment policy. More specifically, the EU regional development policy serves as the necessary investment framework in order to meet the goals of the Europe 2020 Strategy for smart, sustainable and inclusive growth in the EU.

Regional policy is delivered through mainly the European Regional Development Fund (ERDF) and the Cohesion Fund (CF). These two funds are part of a larger set of funds: the European Structural and Investment (ESI) Funds, which next to the two formerly mentioned funds includes the European Social Fund (ESF), the European Agricultural Fund for Rural Development (EAFRD) and the European Maritime and Fisheries Fund (EMFF)\textsuperscript{37}.

The ERDF focuses its investments in the following key priority areas: 1) innovation and research, 2) digitalization, 3) support for SMEs and 4) low-carbon economy and aims strengthen the economic and social cohesion within the EU though balancing out inequalities in regional development\textsuperscript{38}.

The CF aims to reduce the economic and social inequalities between all Member States in the EU through the allocation of financing activities to Member states whose Gross National Income GNI per habitant is less than 90\% of the EU average\textsuperscript{39}.

The ESF aims mainly at boosting employment through the creation of jobs, drawing more people to the working force, supporting business and help people in their chosen careers\textsuperscript{40}.

The EAFRD aims at improving the vibrancy and economic viability of rural communities by rural development measures. For the period of 2014-2020, the main objectives are 1) foster the

\textsuperscript{34} Ministry of Economy, Trade and Industry: “平成 30年度「地域中核企業創出・支援事業」の採択を決定しました”: https://www.meti.go.jp/press/2018/05/20180515006/20180515006.html

\textsuperscript{35} Japan Science and Technology Agency: INDUSTRY-ACADEMIA COLLABORATIVE R&D PROGRAMS; Center of Innovation (COI) Program, JST website: https://www.jst.go.jp/EN/platform/coi.html


\textsuperscript{38} European Commission: European Regional Development Fund, EC website: https://ec.europa.eu/regional_policy/en/funding/erdf/


\textsuperscript{40} European Social Fund: WHAT IS THE ESF?, ESF website: https://ec.europa.eu/esf/main.jsp?catId=35&langId=en
competitiveness of agriculture, 2) ensure the sustainable management of natural resources and climate actions, 3) achieve equality in territorial development of rural economies and communities.\textsuperscript{41}

The EMFF is a fund created for fishermen and aims to 1) help fishermen in the transition to sustainable fishing, 2) support coastal areas and communities in the diversification of their economies, 3) finance projects with the goal to create more jobs and improve quality of life in coastal areas and communities, 4) support sustainable aquaculture development and 5) make access to finance for applicants more easy.\textsuperscript{42}

\textit{Japan}

According to the Organisation for Economic Cooperation and Development (OECD), regional development policy is part of the \textbf{National Spatial Strategy}, a long-term national plan adopted in 2015. The plan is set up through collaboration between several ministries, backed up by consultations from the National Land Council bringing together parliamentarians, academics, representatives of the private sector, elected officials from prefectures and cities and others. In this plan, the national and prefectural governments work together through a network approach to form \textit{regional plans and legislations related to depopulation, regional revitalization, disaster resilience, environmental sustainability as well as competitiveness and innovation}. Within this network approach, systems of cities are part of regional policies, as the policies are building on the economic benefits of the connections and complementarities especially between large metropolitan areas and smaller cities.

A heavy \textbf{emphasis lies on the management of the demographic changes} due to rapidly ageing society, following by disaster resilience following the great earthquake in 2011.\textsuperscript{43} Part of the demographic challenge Japan is facing, is the rapid population shrinkage in rural areas. Metropolitan areas draw young people from rural areas, which has resulted in a quarter of the total population in Japan living in the Greater Tokyo metropolitan area and its neighboring prefectures Chiba, Kanagawa, and Saitama. Therefore, the central piece of the Abe governments is regional revitalization. Measures include initiatives with the aim to revitalize the rural regions through enhancing the competitiveness of Japanese agriculture, increasing entrepreneurship in rural regions, creating a nationwide network of village hubs to serve localities with medical care and crucial services and through investing in transport infrastructure for supporting the interaction amongst regional centres.\textsuperscript{44}

The three main objectives of the rural policies designed by the Japanese government are facing the demographic challenges, ensuring thriving yet sustainable economies and preserving heritage. For the implementations of the policies, The Office of the Headquarters for Overcoming Population Decline

\textsuperscript{41} European Commission: Rural Development, \textit{EC website}: \url{https://ec.europa.eu/info/food-farming-fisheries/key-policies/common-agricultural-policy/rural-development#legalbases}

\textsuperscript{42} European Commission: European Maritime and Fisheries Fund (EMFF), \textit{EC website}: \url{https://ec.europa.eu/fisheries/cfp/emff/}


\textsuperscript{44} The Government of Japan: Regionalism Revitalized Japan, \textit{JapanGov website}: \url{https://www.japan.go.jp/en/regions/regionalism_revitalizes_01.html}
and Vitalizing Local Economy, housed in the Cabinet Secretariat, aims to address the challenges mentioned before in each region through region-specific sustainable societies⁴⁵.

2. Analysis of EU-Japan cluster & region cooperation

2.1 Background

Compared to other world economies, EU and Japan region & cluster collaboration has been relatively slow to emerge. Since 2008, EU-Japan cluster cooperation at the institutional level is established through the EU-Japan Centre for Industrial Cooperation by the launch of a Helpdesk for Clusters. This is a service for the benefit of EU and Japanese clusters that aims to help interested clusters from the EU and Japan identify potential cooperation partners in the reciprocal regions. The Centre also organizes regular match-making missions to Japan for EU clusters. A Memorandum of Understanding (MoU) was signed between ECCP and the Centre in 2012, showing that EU-Japan cluster cooperation is clearly established. On the Japanese side, EU-Japan region & cluster cooperation has mainly been pushed by JETRO with its RIT programme⁴⁶.

This chapter will discuss ongoing EU-Japan region & cluster cooperation, case studies of EU-Japan region & cluster cooperation and underlying drivers, challenges and benefits of EU-Japan region & cluster cooperation. First, existing EU-Japan region & cluster cooperation identified by online reports and papers is being discussed (2.2.1). Subsequently, existing EU-Japan region & cluster cooperation identified by the survey as well as general interest in EU-Japan region & cluster cooperation will be discussed (2.2.2). Thereafter, case studies identified by the survey and interviews with EU and Japanese stakeholders will be discussed (2.3). Next, other relevant cooperation identified by the survey and the interviews will be discussed (2.4). Finally, this chapter will discuss the underlying drivers for EU-Japan region & cluster cooperation, challenges faced during EU-Japan region & cluster cooperation and benefits of EU-Japan region & cluster cooperation for SMEs involved (2.5).

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⁴⁵ Organisation for Economic Cooperation and Development, 2019
⁴⁶ European Cluster Collaboration Platform, 2019, pp. 4-10
2.2 Identification and characteristics of EU-Japan region & cluster cooperation

2.2.1 EU-Japan region & cluster cooperation identified by the ECCP

➢ Toyama Pharmaceutical Association, Toyama Prefecture, Japan - Polepharma, Île de France, France

Characteristics of the counterparts

<table>
<thead>
<tr>
<th>Toyama Pharmaceutical Association</th>
<th>Polepharma</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Toyama Pharmaceutical Association is an organization in the pharmaceutical industry with the aim to understand the circumstances surrounding the pharmaceutical industry, and to contribute to the sound development of this industry in Toyama Prefecture and the improvement of public health. Against this backdrop, the associations activities include:</td>
<td>POLEPHARMA is a French biomedical cluster that aims to stimulate the economic and industrial development of the players in the French pharmaceutical sector through actions for promoting competitiveness, innovation and employment attractiveness in the Central regions of France: Val de Loire, Normandy and Ile de France. Their services include:</td>
</tr>
<tr>
<td>• Information collection</td>
<td>• Network access/consultancy</td>
</tr>
<tr>
<td>• Ensuring quality of medicines</td>
<td>• Support at major trade events</td>
</tr>
<tr>
<td>• Promotion of research and development</td>
<td>• Skills development</td>
</tr>
<tr>
<td>• Sales expansion</td>
<td>• Expertise management</td>
</tr>
<tr>
<td>• International exchanges</td>
<td>• Business coaching</td>
</tr>
<tr>
<td>The associations members include pharmaceutical related companies in Toyama prefecture(^{47}).</td>
<td>• Communication tools access</td>
</tr>
<tr>
<td></td>
<td>• Career opportunities(^{48})</td>
</tr>
</tbody>
</table>

Characteristics of the cooperation

<table>
<thead>
<tr>
<th>Activities</th>
<th>Sector</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Co-development, technology exchange, promotion of the Toyama brand</td>
<td>Health/Medical products/Beauty</td>
<td>2014</td>
</tr>
</tbody>
</table>

Details of cooperation

The partnership between Toyama Pharmaceutical Association and POLEPHARMA started in 2014, but there has been no MoU signed. The partnership was initiated by the JETRO regional office in Paris which was at the time looking for parties interested in partnering with Japanese industries. The first visit was made by a delegation from Toyama to Paris. In 2015, a French delegation visited Japan with the aim of strengthening the partnership. The goal of the partnership is to help the Toyama Pharmaceutical Association to internationalize and to promote the Japanese brand abroad though


\(^{48}\)Polepharma, Missions POLEPHARMA, Polepharma website: [https://www.polepharma.com/le-cluster/](https://www.polepharma.com/le-cluster/)
promoting high-quality pharmaceutical manufacturing, encouraging co-development and technology exchange on both medicine as such and manufacturing processes\textsuperscript{49}.

- Kobe Biomedical Innovation Cluster Hyogo Prefecture, Japan - Life Science Nord, Germany

**Characteristics of the counterparts**

<table>
<thead>
<tr>
<th>Kobe Biomedical Innovation Cluster</th>
<th>Life Science Nord</th>
</tr>
</thead>
</table>
| The Kobe Biomedical Innovation Cluster brings together industrial, academic and government organizations for the creation of a new research and development institution on the Kobe Port Island for the advancement of medical technology. The cluster aims to revitalize the area’s economy, to promote the health and welfare of the citizens and to make international contribution to the biomedical industry\textsuperscript{50}. | Life Science Nord is the regional branch network for medical technology, biotechnology and pharmaceuticals for the states of Hamburg and Schleswig-Holstein. The cluster is an important innovation and economic factor in the states mentioned. The aim of the cluster is to promote cooperation between business, science and politics in a targeted manner and thus make a significant contribution to innovation and added value in the region and to the international visibility of the life science location in northern Germany\textsuperscript{51}. Their services include:  
- Network access  
- Provision of up-to-date knowledge on key areas such as regulatory affairs, CE documentation, financing, etc.  
- Advisory services  
- Support for participation in trade fairs and congresses  
- International partnering  
- Marketing  
- Career opportunities |

**Characteristics of the cooperation**

<table>
<thead>
<tr>
<th>Activities</th>
<th>Sector</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizing matchmaking events, supporting technology transfers, commercialization of innovation</td>
<td>Life Science</td>
<td>2015</td>
</tr>
</tbody>
</table>

\textsuperscript{49} European Cluster Collaboration Platform, 2019, pp. 7  
\textsuperscript{50} Kobe Biomedical Innovation Cluster, 2014: “Kobe Biomedical Innovation Cluster” \url{https://www.city.kobe.lg.jp/information/project/iryo/english/img/iryou_e.pdf}  
\textsuperscript{51} Life Science Nord: Gemeinsam für innovative Medizin, Life Science Nord website: \url{https://lifescienciernord.de/de/%C3%BCber-uns/unsere-organisation.html}
Details of cooperation

The cooperation between the Kobe Biomedical Innovation Cluster and Life Science Nord was initiated by the JETRO RIT program and started in 2015. After a few delegation visits by Life Science Nord as well as the Kobe Foundation for Biomedical Research and Innovation (after April 2018 known as Kobe Biomedical Innovation Cluster52), a MoU was signed. The cooperation aims to, beyond matchmaking events, support technology transfers and introduce innovation on both the markets53.

➢ Hitachi Regional Technical Support Centre, Ibaraki Prefecture, Japan – Automotive, Baden-Württemberg, Germany

Characteristics of the counterparts

<table>
<thead>
<tr>
<th>Hitachi Regional Technical Support Centre</th>
<th>Automotive Baden-Württemberg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hitachi Regional Technical Support Centre is a core facility with the aim to help advance and revitalize industry in Ibaraki prefecture54. For this, Hitachi Regional Technical Support Centre implements various projects in the context of seven different core areas:</td>
<td>Automotive Baden-Württemberg is a cluster boasting firms devoted to designing and manufacturing high-end vehicles and vehicle components in Baden-Württemberg. The aim of the cluster is to create sustainable development and safeguarding Baden-Württemberg as an innovative hub for manufacturing. Their services include:</td>
</tr>
<tr>
<td>• Creation of new industries</td>
<td>• Organizing conferences, workshops, and seminars</td>
</tr>
<tr>
<td>• Assisting the development of new products and technologies</td>
<td>• Initiating issue-specific workgroups</td>
</tr>
<tr>
<td>• Developing human resources, including engineers</td>
<td>• Mediating and/or establish cooperation projects</td>
</tr>
<tr>
<td>• Providing sales and management support and assist with finding new business partners</td>
<td>• Offering training programmes in innovative technologies and process-related issues</td>
</tr>
<tr>
<td>• Educating companies in the area</td>
<td>• Subsidizing participation at trade fairs, congresses, etc.</td>
</tr>
<tr>
<td>• Supporting overseas business expansion</td>
<td>• Providing information and knowledge transfer in respect of current trends and technologies</td>
</tr>
<tr>
<td>• Assisting start-ups55</td>
<td>• Providing information on current promotion programs</td>
</tr>
</tbody>
</table>

52 Foundation for Biomedical Research and Innovation at Kobe: About us, FBRI website: https://www.fbri-kobe.org/english/about/  
53 European Cluster Collaboration Platform, 2019 pp. 7  
56 Automotive BW, “How we see ourselves”, Automotive BW website: https://www.automotive-bw.de/gb/
Characteristics of the cooperation

<table>
<thead>
<tr>
<th>Activities</th>
<th>Sector</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fostering match-making, creation of contacts</td>
<td>Industry</td>
<td>2015</td>
</tr>
</tbody>
</table>

Details of cooperation

A MoU has been signed between the counterparts in 2015 in order to cooperate in the automotive industry. In order to foster **matchmaking and networking**, two visits have been made, one in both countries.

➢ **Nagasaki Dejima Incubator, Nagasaki, Nagasaki Prefecture, Japan - Scotland House, United Kingdom**

Characteristics of the counterparts

<table>
<thead>
<tr>
<th>Nagasaki Dejima Incubator</th>
<th>Scotland House</th>
</tr>
</thead>
<tbody>
<tr>
<td>In order to increase innovation activity throughout Japan the Japanese national</td>
<td>Scotland House is a platform based in London for Scottish companies looking</td>
</tr>
<tr>
<td>government started a program to support local SMEs in every prefecture. Nationwide, 32</td>
<td>to trade development, investment and partnership opportunities. It also houses</td>
</tr>
<tr>
<td>incubators were established, of which one of them was the Nagasaki Dejima Incubator.</td>
<td>Scotland House Partners, the Scottish Government, Scottish Enterprise,</td>
</tr>
<tr>
<td>The incubator was established in cooperation with Nagasaki University, the University</td>
<td>Highlands and Islands Enterprise, and VisitScotland in London.</td>
</tr>
<tr>
<td>of Nagasaki, the Nagasaki Institute of Applied Science, Nagasaki City, Nagasaki</td>
<td>The services provided by the platform are:</td>
</tr>
<tr>
<td>Prefecture and SME related company organizations, and brings together about 20</td>
<td>❗ Co-working spaces</td>
</tr>
<tr>
<td>companies.</td>
<td>❗ Meeting rooms</td>
</tr>
<tr>
<td>❗ Online member network</td>
<td>❗ Member events</td>
</tr>
</tbody>
</table>

Characteristics of the cooperation

<table>
<thead>
<tr>
<th>Activities</th>
<th>Sector</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Networking</td>
<td>Environment/Energy</td>
<td>2015</td>
</tr>
</tbody>
</table>

Details of cooperation

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After the Japanese government launched a funding project for the creation of new forms or power in order to deregulate the Japanese electricity market, an energy hub between the Scotland House and the Nagasaki Dejima Incubator was created in 2015 by the Japanese Cabinet Secretary for Culture and the Scottish External Affairs Fiona Hyslop. The goal of this hub between the Japanese and the Scottish counterpart is to make space available in the Nagasaki Dejima Incubator for Scottish companies and stakeholders in order to let them build relationships with Japanese offshore renewables and marine energy sector stakeholders60.

- Fukushima Prefecture, Japan – The State of North Rhine-Westphalia, Germany

**Characteristics of the counterparts**

<table>
<thead>
<tr>
<th>Fukushima prefecture</th>
<th>The State of North Rhine-Westphalia</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Fukushima prefecture government, after the 2011 earthquake and the nuclear disaster, has focused on the creation of the renewable energy industry in the area, and aims to become a pioneer in this field under the &quot;Fukushima Renewable Energy Promotion Vision&quot; scheme. Against this backdrop, the Energy Agency Fukushima has been established to boost the number of companies in the renewable energy industry as well as to increase jobs and output volume in the industry in the prefecture61. Furthermore, the Fukushima prefecture government promotes the participation of Fukushima companies in renewable energy by supporting the development of research into technical and products62.</td>
<td>The state of North Rhine-Westphalia boasts a dense network of research institutes as well as numerous companies offering innovative energy products and services for increasing energy efficiency and utilizing renewable energies. The state actively promotes renewable energies and to achieve Germany's climate protection goals, the state has introduced its own Climate Protection Law. This provides for a reduction of greenhouse gas emissions by the year 2020 of at least 25 percent and by the year 2050 of at least 80 percent compared to 199063.</td>
</tr>
</tbody>
</table>

**Characteristics of the cooperation**

<table>
<thead>
<tr>
<th>Activities</th>
<th>Sector</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promotion of use of renewable energy, hosting trade fairs, joint research</td>
<td>Environment/Energy</td>
<td>2014</td>
</tr>
</tbody>
</table>

---

60 European Cluster Collaboration Platform, 2019, pp. 8
Details of cooperation

From 2014 onwards, Fukushima prefecture and the State of North Rhine-Westphalia are working together on the promotion of the use of renewable energy. An MoU was signed on 2014 and the underlying driver to start the cooperation came from Fukushima prefecture, as the prefecture was aiming to introduce technologies in the renewable energy sector from Germany, a leader in the field. The counterparts take turns in hosting fairs featuring renewable energy businesses. Additionally, they promote joint research among businesses64.

➢ Osaka Bio Headquarters, Osaka prefecture, Japan – BioXClusters+, EU

Characteristics of the counterparts

<table>
<thead>
<tr>
<th>Osaka Bio Headquarters</th>
<th>BioXClusters+</th>
</tr>
</thead>
<tbody>
<tr>
<td>In order to promote the further development of the life sciences industry in Osaka Prefecture, a prefectural industry-academia-government collaboration called Osaka Bio Headquarters has been commissioned by the Osaka Prefecture Life Science Industry Division of the Osaka prefecture government. The aim of the organization is to further develop the health and medical-related industries in the region. The organization is responsible for:</td>
<td>The BioXClusters’ alliance, formed since 2012 by Biocat (Catalonia), BioM (Bavaria), BioPmed (Piedmont) and Lyonbiopole (Auvergne Rhone-Alpes), has deployed strategic partnerships over the years with organizations outside Europe to offer internationalization services to healthcare SMEs. The main services BioXClusters+ offers to its member companies:</td>
</tr>
<tr>
<td>• Implementing business development</td>
<td>• Market information and informative materials about the target country, the local market, major players, and specific opportunities.</td>
</tr>
<tr>
<td>• Commanding a wide range of external and internal networks</td>
<td>• Guidance on how to start a business in the target country and about local funding opportunities</td>
</tr>
<tr>
<td>• Reinforcing overseas transmissions</td>
<td>• Matchmaking service/access to knowledge networks66</td>
</tr>
<tr>
<td>• Networking with overseas clusters</td>
<td></td>
</tr>
<tr>
<td>• Transmission of newsletters</td>
<td></td>
</tr>
<tr>
<td>• Participation in international conferences65</td>
<td></td>
</tr>
</tbody>
</table>

Characteristics of the cooperation

<table>
<thead>
<tr>
<th>Activities</th>
<th>Sector</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Matchmaking events, Business mission to Japan,</td>
<td>Life Science</td>
<td>2016</td>
</tr>
</tbody>
</table>

64 European Cluster Collaboration Platform, 2019, pp. 8
66 BioXClusters, “bioXclusters internationalization Support to SMEs – Call for expressions of interest”, BioXClusters website: https://bioxclusters.eu/
Details of cooperation

The EU and Japan face similar challenges regarding an ageing population and the increasing demand for personalized health care. Since Japan has shown interest in business and research cooperation with the EU, this has reinforced the attractiveness of the Japanese markets to EU SMEs. Therefore, BioXClusters+ decided to turn to the Japanese market and to do so, it received a grant from the European Commission under the COSME Cluster Go International program in 2014. Eventually, an MoU was signed in 2016. Activities within the cooperation scheme consist of mainly matchmaking events and business missions\textsuperscript{67}.

\textsuperscript{67} European Cluster Collaboration Platform, 2019, pp. 16
2.2.2 EU-Japan region & cluster cooperation identified by the survey

Approximately 500 Japanese and EU stakeholders were contacted. Stakeholders were selected on the basis of their internationalization strategy and therefore have a higher disposition to hold an EU-Japan agreement. Stakeholders were mainly identified through reviewing websites, online reports and Europe Enterprise Network (EEN) contacts.

Japanese stakeholders were identified through the Cluster mapping in Japan report made by the EU Japan Centre for industrial cooperation in 2013 and complemented by the 2016 updated version of the report and through existing EEN contacts. The EU stakeholders were identified through online reports, data provided by the ECCP website and data provided by the Regional Innovation Monitor Plus (RIM Plus) of the EC.

The following table shows how many EU and Japanese stakeholders were contacted, how many stakeholders have filled out the survey and how many stakeholders indicated that they have ongoing EU-Japan region & cluster cooperation by type of stakeholder:

<table>
<thead>
<tr>
<th>Category</th>
<th>EU</th>
<th>Japan</th>
<th>of stakeholders</th>
<th>of answered stakeholders</th>
<th>of stakeholders with cooperation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clusters</td>
<td>83</td>
<td>29</td>
<td>28</td>
<td>8</td>
<td>12</td>
</tr>
<tr>
<td>Regions/prefectures</td>
<td>170</td>
<td>14</td>
<td>24</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Municipalities</td>
<td>2</td>
<td>14</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Regional promotion agencies</td>
<td>205</td>
<td>23</td>
<td>29</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>Chambers of Commerce and Industry</td>
<td>45</td>
<td>2</td>
<td>11</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Total</td>
<td>505</td>
<td>68</td>
<td>92</td>
<td>14</td>
<td>26</td>
</tr>
</tbody>
</table>

Table 1: Number of contacted stakeholders/answered stakeholders/ stakeholders with cooperation

As can be seen in Table 1, **28.26% of the EU survey respondents indicated to be engaged in EU-Japan region & cluster cooperation** and 57.14% of the Japanese survey respondents indicated to be engaged in EU-Japan region & cluster cooperation. Based on data from Table 1, Figure 1 has been composed to visualize the existence of EU-Japan region & cluster cooperation amongst the survey respondents.

Furthermore, Figure 2 has been composed to visualize the composition of EU survey respondents by type of organization and Figure 3 has been drafted to visualize the composition of Japanese survey respondents by type of organization.

---

23
**Types of cooperation counterparts of survey respondents**

It should be noted that despite the focus on identifying EU-Japan region & cluster cooperation, some EU survey respondents indicated to be engaged in EU-Japan region & cluster cooperation whereas the Japanese counterpart was not a prefecture or a cluster.
Amongst the 26 EU survey respondents who indicated to be engaged in EU-Japan region & cluster cooperation, 8 survey respondents indicated to be engaged in cooperation with at least one Japanese prefecture, 4 survey respondents indicated to be engaged in cooperation with at least one Japanese cluster, and 16 survey respondents indicated to be engaged in cooperation with at least one other type of Japanese entity. Most commonly mentioned counterparts other than prefectures and clusters are national industry associations, private companies, municipalities, foundations, universities and technology and research institutes. For a visualization of this data, see Figure 4.

Amongst the 8 Japanese survey respondents who indicated to be engaged in EU-Japan region & cluster cooperation, 5 survey respondents indicated to be engaged in cooperation with at least one EU cluster and 3 survey respondents indicated to be engaged in cooperation with at least one other type of EU entity. Most commonly mentioned counterparts other than regions and clusters are national business and investment agencies, trade show organizations, research institutes and municipalities. Cooperation with regional business/development/innovation agencies and regions has not been identified amongst the Japanese survey respondents. For a visualization of this data, see Figure 5.
Activities

Types of activities within cooperation schemes have been divided into 6 categories, based on the range of activities mentioned by all survey respondents. These activity types are as follows:

1. Joint R&D projects
2. Business/commerce cooperation activities
3. Information exchange activities
4. Conferences/trade fairs participation/organization
5. Delegation visits
6. Cultural exchange activities

It is important to note that the business/commerce category includes multiple kinds of activities. Activities classified in this category are business matchmaking, business missions and market access and distribution assistance. Furthermore, the exchange of information category amounts to, apart from exchanging information, organizing seminars, workshops, networking and education and training. The delegation visits category refers to political delegation visits with the purpose of strengthening political ties between the cooperating organizations. Finally, the culture exchange category amounts to exchanges in tourism and sports.

Amongst the 26 EU survey respondents who indicated to be engaged in cooperation with at least one Japanese entity, 9 survey respondents are engaged in joint R&D projects, 19 stakeholders are engaged in business/commerce cooperation activities, 15 stakeholders are engaged in information exchange activities, 4 stakeholders are engaged in the joint organization/participation in conferences/trade fairs, 3 stakeholders are engaged in political delegation visits and 2 stakeholders are engaged in cultural exchange activities. For a visualization of this data, see Figure 6.

Amongst the 8 Japanese survey respondents who indicated to be engaged in cooperation with at least one EU entity, 4 survey respondents are engaged in joint R&D projects, 6 survey respondents are engaged in business/commerce cooperation activities, 4 survey respondents are engaged in information exchange activities, 1 survey respondent is engaged in the joint organization/participation in conferences/trade fairs, 1 survey respondent is engaged in political delegation visits and 1 survey respondent is engaged in cultural exchange activities. For a visualization of this data, see Figure 7.
Existence of interest in EU-Japan region & cluster cooperation

EU as well as Japanese survey respondents without any ongoing EU-Japan region & cluster cooperation were asked if they would be interested in EU-Japan region & cluster cooperation.
Amongst the 66 EU survey respondents who indicated that they are not currently engaged in EU-Japan region & cluster cooperation, 83.33% indicated to be interested in cooperating with Japanese prefectures/clusters. On the other hand, amongst the 6 Japanese survey respondents who indicated that they are not currently engaged in EU-Japan region & cluster cooperation, none would be interested in cooperating with EU regions/clusters.

In addition, survey respondents without current EU-Japan region & cluster cooperation who indicated to have no interest, were asked to specify the reason for their disinterest. Uninterested EU survey respondents mentioned either that they have no strategic focus on Japan or that there is no demand for such cooperation from their SMEs. Uninterested Japanese survey respondents mentioned that there is no strategic focus on the EU.

Both EU and Japanese survey respondents who indicated not to be engaged in EU-Japan region & cluster cooperation were moreover asked if they were engaged in such cooperation in the past. In case they answered affirmatively, they were asked to specify the reason for the termination of the cooperation.

The majority of survey respondents from both the EU and Japan without any ongoing EU-Japan region & cluster cooperation indicated that they did not have such cooperation in the past. Survey respondents who indicated to have only been engaged in EU-Japan region & cluster cooperation in the past, most commonly specified that the reason the activity has ceased was that either the funding had stopped or that the cooperation activity was time specific. One Japanese survey respondent specified that there was no interest from the Japanese side in continuing cooperation.
2.3 Case studies

As cluster-to-cluster and region-to-region cooperation cases were rare amongst the survey responses, but the case studies below are a selection of the following types of cooperation:

1. There is at least one EU region/regional agency and at least one Japanese prefecture involved in the cooperation, hereafter referred to as EU-Japan region-to-region cooperation.
2. There is at least one EU cluster and at least one Japanese cluster involved in the cooperation, hereafter referred to as EU-Japan cluster-to-cluster cooperation.
3. There is at least one EU region/regional agency and at least one Japanese cluster involved in the cooperation, and vice versa: there is at least one EU cluster and at least one Japanese prefecture involved in the cooperation, hereafter referred to as EU-Japan region-to-cluster cooperation.

Survey respondents with an ongoing and relevant type of cooperation with either EU or Japanese counterparts were invited for an interview to gather more in-depth information about their current cooperation activities. Consequently, based on the following criteria case studies were benchmarked to be highlighted in the report:

- Cooperation activities concern **region-to-region, cluster-to-cluster and region-to-cluster cooperation**
- A **strong interest** in long-term cooperation is identified
- **SMEs are actively involved** in the cooperation

Through the responses to the survey and the in-depth information gained through the conduction of interviews, 1 case within the EU-Japan region-to-region cooperation category has been identified, 6 cases within the EU-Japan cluster-to-cluster cooperation category have been identified and 2 cases within the EU-Japan cluster-to-region cooperation category has been identified.

Other case studies in which EU as well as Japanese SMEs are involved to a high degree in cooperation activities will be found in the other case studies section of this report. Although they are not as relevant for the purpose of the report as the EU-Japan region & cluster cooperation case studies, they do contain valuable information on the underlying drivers, benefits and challenges for EU-Japan cooperation with the involvement of SMEs.

The content of the case studies in this section of the report, including names of the interviewees, has been disclosed upon approval of the interviewees on a case by case basis.
2.3.1 EU-Japan region-to-region cooperation

City State of Hamburg, Germany – Fukushima prefecture, Japan

Sector: Energy

An interview with Mr. Kolja Harders, Ms. Britta Puchert, Director of Foreign Trade Division and Assistant for Asia respectively of the Authority for Economic Affairs, Transport and Innovation of the Senate of the Free and Hanseatic City State of Hamburg was conducted in order to discuss the region-to-region cooperation between the City State of Hamburg and Fukushima prefecture.

About the city state of Hamburg Authority for Economic Affairs and the Foreign Trade division

Hamburg is a city state, governed by the Senate. It represents the Free and Hanseatic City of Hamburg in dealing with the other federal states, the federal government and other countries. The Departmental Authorities in the senate of the city state of Hamburg correspond to ministries in German area states. The Departmental Authority for Economic Affairs, Transport and Innovations mission is to strengthen the regional economy and to foster technical progress. Important aspects are research and development and future-oriented sectors and clusters.

The Department for International Economic Relations within the Authority for Economic Affairs, Transport and Innovation includes the divisions for Foreign Trade, European Union and Environmental Economic Policy. The Foreign Trade Division of the Economic Authority coordinates the Senate's foreign trade activities and it also represents Hamburg's foreign trade interests vis-à-vis the federal government and the EU. Additionally, the unit looks after foreign delegations and organizes the business senator's trips abroad. The division also accompanies businesses, among which SMEs, in their internationalization through the organization of outbound business missions, matchmaking and information events, delegation visits with clear goals and through providing advice. Business missions to foreign countries are often targeted on one or two industries.

About Fukushima prefecture and it's revitalization strategy on renewable energy


After the Great East Japan Earthquake and the nuclear disaster, Fukushima continues to make progress toward a new future. Recovery from the disaster, growth of new industries, and technology development are the focus areas of the prefectural government\(^{72}\). According to JETRO’s mapping tool, Fukushima prefecture’s well-developed industries are Life sciences, Electronics and Environment and Energy. Fukushima is one of the country’s major "prefectures producing medical devices", supported by the prefecture’s Utsukushima Next Generation Medical Industry Agglomeration Project. Furthermore, the prefecture is working on the concentration of the robotics industry with a focus on technologies that can be used in disaster response, medical care, agriculture and physical distribution, supported by the Fukushima Innovation Coast Scheme by METI\(^{73}\). Additionally, the prefecture is aiming to become a pioneer in the field of renewable energy\(^{74}\) through the development of technologies in the field, supported by the National Institute of Advanced Industrial Science and Technology (AIST), an academy, industry and government collaboration, as well as the Support Program for Local Innovation Strategy by MEXT.

Results of the interview

The City State of Hamburg, Germany, cooperates with several Japanese counterparts. Counterparts mentioned in the survey are Osaka city, Tokyo city, Kobe city, Hyogo prefecture, Chiba prefecture, Fukushima prefecture, Energy Agency Fukushima, METI, NEDO, MLIT and the Sakura Foundation. Although Mr. Harders has expressed that the state of Hamburg is generally open for but not focused on signing MoUs or letters of intention within the framework of collaboration, it is common for them to sign MoUs (or letters of intention) with Asian counterparts. This is also the case for Japan, with which MoUs have been signed on different institutional levels such as on the political level, regional level, cluster level as well as on the company level. In this interview, the focus was on discussing the regional level cooperation activities of the State of Hamburg and Fukushima Prefecture.

The cooperation activity with Fukushima Prefecture began in 2012 with an energy industry factfinding mission by the State of Hamburg to Tokyo right after the Fukushima disaster with the help of METI, NEDO and TEPCO. During the fact finding mission, political stakeholders of the institutions mentioned gathered and the Japanese side was interested in the renewable energy industry of the State of Hamburg. At the time, the State of Hamburg was the first entity to meet Japanese political stakeholders after the Fukushima disaster and was able to promise fruitful collaboration with Japanese entities although nowadays cooperation activities between German and Japanese entities in the field of renewable energies are common. The underlying driver for the State of Hamburg to visit Japan specifically was that Germany and Japan in general had a trustworthy relationship in advance. According to Ms. Harders, this could be explained by the fact that Japan and Germany are to some extent natural partners because of a similarity in culture. This has resulted in the Japanese trusting German collaboration counterparts and Germans having sympathy for Japanese collaboration counterparts since a long time already. After the first visit to Tokyo, the State of Hamburg kept close

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contact with the Energy Agency Fukushima and through them, the State of Hamburg and Fukushima prefecture began cooperating on a regional level in the field of wind energy and hydrogen. In the case of cooperation between the State of Hamburg and Fukushima prefecture, an MoU without a deadline as long as there is a continued interest from companies in both regions has been signed with the sole purpose to provide a framework for the cooperation activities on a political level.

The goal of the cooperation between the State of Hamburg and Fukushima prefecture is to internationalize local SMEs and to let SMEs from both regions collaborate. This is being realized by organizing business meetings for companies of both regions meet during matchmaking and information events as well as conventions. Furthermore, the regions plan fact finding missions on the political as well as on the business level and delegation visits with clear goals. The focus however is on the internationalization of the SMEs in both regions and thus on the commercial aspect of the cooperation.

Challenges faced in the cooperation activities related to the internationalization of companies can be divided in roughly two categories, according to Mr. Harders. These are conflicts in culture and conflicts in interests. Cultural conflicts include differences in decision making and language barriers. Often, SMEs from the State of Hamburg and in general, do not have sufficient funding resources, the cultural know-how and the right human recourses to internationalize on their own. They depend on fast turnover and short-term visions in order to grow, Mr. Harders explained. In the case of SMEs in the State of Hamburg, company members do not know the Japanese culture, and according to Mr. Harders, there is a strong belief that Japanese companies are highly hierarchic and that a lot of time is needed to create a trustworthy relationship with the counterparts prior to actual collaboration activities to take place. The perceived time it takes to reach a collaboration framework with Japanese counterparts often results in German companies regarding engagement with Japanese counterparts as too much of an investment. Furthermore, the perception that Japanese lack knowledge of the English language and thus there is a need for an expensive interpreter is discouraging for SMEs in the State of Hamburg. The other challenge, a conflict of interests, arises from the fact that the SMEs in the State of Hamburg mainly have the goal to sell their products on the Japanese markets. On the other hand, Japanese counterparts are more interested in collaboration with the goal to get an idea on German technology in the energy industry in order to produce similar products themselves rather than buying German technology. However, as Ms. Puchert added, although the Japanese and German counterparts face some conflicting interests, collaboration is still seen as fruitful as Japanese counterparts prove themselves to be trustworthy partners and the German counterparts are also interested in the Japanese way of developing the best products. Despite all this, the Japanese energy market is not yet that open for foreign products yet. Furthermore, German companies trying to enter the Japanese market face fierce competition because the Japanese energy market is dominated by mainly large companies. This, as Mr. Harders explained, is already changing as the main trade partner in the energy industry, the US, has reduced its activity on the Japanese market and together with the signing of the free trade agreement between the EU and Japan, this leaves space for EU companies to enter the Japanese energy industry markets.

Benefits of the cooperation between the State of Hamburg and Fukushima prefecture as stated by Mr. Harders is that both parties are benefiting from the internationalization of their companies as this is their goal being reached. Increasingly, companies in Japan are opening up for cooperation activities with German counterparts as the State of Hamburg and Fukushima prefecture are paving the way open for these companies to do so on a regional level. This, according to Mr. Harders, has resulted in
an increased amount of innovation through partnering in high tech. Furthermore, bilateral relations between the State of Hamburg and Fukushima prefecture have been bettering and this has given the two parties the incentive to also engage with each other on geopolitical questions.
2.3.2 EU-Japan cluster-to-cluster cooperation

*BioM, Germany - Osaka BioHeadquarters, Japan*

**Sector: Biotechnology**

An interview Ms. Maria Lamottke, Chairwoman of the Board of Directors at Bicoll Biotechnology of Bicoll GmbH, Germany has been conducted in order to discuss the cluster-to-cluster cooperation between BioM and Osaka BioHeadquarters from an SME point of view. The buildup for this cooperation activity also involved the partnership between Osaka prefecture and BioM, which is discussed in another interview later in this report under the EU cluster-Japanese prefecture section.

**About Bicoll GmbH**

Bicoll is an SME part of the BioM Cluster in the State of Bavaria, Germany in the biopharmaceutical industry sector, offering pre-clinical support in the areas of Drug Discovery from Natural Products as well as Medicinal Chemistry.

The company provides efficient, multi-disciplinary approach to **drug discovery, dedicated to the discovery and optimization of the highest quality lead compounds**. Through expertise and experience in high tech natural product chemistry and medicinal chemistry, the company **increases quality and quantity of the drug discovery pipeline of its partner’s candidates portfolio**.

Bicoll offers a small molecule drug-like compound library from endemic Asian plants with enhanced probability of biological activity to its global clients in drug discovery and related innovative fields, like plant protection and nutraceuticals. The technological focus is set on making compounds from natural resources (plants) compatible with the clients’ screening systems. The technology allows it to serve biological screening approaches (whole cell, whole organism) as well as biochemical high-throughput-screening set-ups (e.g. protein-protein interaction with FRET-read-out)\(^75\).

**Results of the interview**

According to Ms. Lamottke, cooperation activities in research in the biopharmaceutical industry are quite common. This could be explained by a big interest from Japan, being a big player in the global context in the biopharmaceutical market, in research driven cooperation with foreign entities.

Bicoll GmbH is involved in a project which was **initially set up by the BioM cluster**. The projects participants consist of **two German and two Japanese entities**. The participants on the German side are Bicoll GmbH (Planegg) and Charité University (Berlin). The participants on the Japanese side are EVI Japan (Fukushima) and Showa University (Tokyo). The project officially started entities in **July 2019** through the organization of BioM, a biotech cluster consisting of Bavarian biotechnological enterprises, service providers, suppliers, consultants, investors, etc\(^76\), but has been **active for 3 years in order to**

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\(^75\) Bicoll Group LinkedIn: [https://www.linkedin.com/company/bicoll/](https://www.linkedin.com/company/bicoll/)

identify and to approach the Japanese partners with the help of BioM. Although the project was set up with the help of the BioM cluster, currently the entities are working together independently. The duration of the project is set to last until the end of 2021 according to a signed MoU between all entities.

According to Ms. Lamottke, Japan was initially not a priority market for Bicoll GmbH and most of their partners are from within the EU, such as companies in Germany and France, as well as the USA even though Bicoll GmbH was aware of Japanese research organizations that were looking for research partners abroad. The reason why Bicoll GmbH did not earlier reach out to Japanese entities is that, as Ms. Lamottke explained, the expected language barrier was being seen as an obstacle. This, however changed when BioM initiated the participation in a funded project for partnerships with Japanese entities, because BioM already was active in Japan as they had been active in Osaka prefecture because of an earlier cluster project with Osaka BioHeadquarters that ran until 2018, in which Bicoll GmbH was involved. Upon the end of the previous cluster project, the company applied for continuation of their cooperation with their Japanese counterparts, as the program was initially designed to continue collaboration amongst the participating entities by formulating their own projects after the end of the cluster collaboration. This new joint research project would be supported by funds from the Federal Ministry of Education and Research (BMBF), which was the driver for Bicoll GmbH to take part in the project. In February 2017, the Federal Cabinet adopted the new strategy of the Federal Government for the internationalization of education, science and research, which is led by the BMBF was worked out. This strategy builds on the Federal Government's internationalization strategy from 2008, responding to the new trends and challenges with a major impact on international cooperation in education, science and research. The strategy focuses on increasing globalization, digitization, the further development of the European Research Area and the development of new, global innovation centres outside of the established science locations. Since the counterparts in projects set up by BioM in the context of the funding needed to be Japanese, Bicoll GmbH opened its doors for collaboration with Japanese entities.

The goal of the cooperation is to develop useful research outcomes for patients and to develop products for the market through joint research. As of this moment, the partnership aims to develop and create a protein chip functioning as a twin of a patient, that can be used for medicine testing instead of the patient himself/herself. According to Ms. Lamottke, Bicoll GmbH didn’t have the knowledge and experience on all aspects of this type of research, so finding partners with who the company could combine its expertise and experience was a big driver in continuing the collaboration as was set up by BioM previously. Since the current joint research project has only started in 2019, which makes the duration of the joint research project three months at the time of the interview, there has been no great successes in terms of research outcomes yet, according to Ms. Lamottke. Another factor that plays a role is that the pace in which the project was high for the both parties to come to terms on how to conduct the joint research with what goals they would like to proceed the project. Furthermore, defining the goals and methods is difficult because the cooperation counterparts are made up of different types of organizations (universities and companies) which on themselves have different goals. Another challenge mentioned by Ms. Lamottke was the fact that BioM is less involved in the joint research project, which means that all counterparts have to continue

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the aspects of the collaboration with less mediation of BioM. Moreover, because the effort spent so far has mainly been spent by the German side of the collaboration, it is hard for Bicoll GmbH to estimate how well the Japanese side of the project knows how to organize similar incentives. Ms. Lamottke also mentioned that she took part in a 2-day training at the The European Institute of Innovation and Technology (EIT) dealing with Japanese business culture in order to be able to understand the Japanese counterparts. However, a similar initiative on the Japanese side in order to understand the German way of business has not been made. This however, would have been useful according to Ms. Lamottke.

Despite the challenges Bicoll GmbH faces during the joint research project, the company hopes for a long-term partnership with the Japanese entities as the company sees many benefits of the cooperation. An important reason for this is, as Ms. Lamottke mentioned, that the company hopes that they can create further partnerships and access the Japanese market through this partnership, which would otherwise be extremely difficult due to the fact that the theme of the research is very specific and thus not easily exchangeable.
BioM, Germany – Kawasaki King Skyfront, Japan

Sector: Life science

An interview with Mr. Naekura, Assistant Manager of Kawasaki City Coastal Area International Strategy Headquarters, International Strategy Promotion Department; Mr. Kono, Life Science Chief Coordinator / Vice Producer of the Regional Ecosystem Formation Program at Kawasaki Institute of Industrial Promotion, New industry Division; and M. Kidera of the Kawasaki Institute of Industrial Promotion, New industry Division was conducted in order to discuss the cluster-to-cluster cooperation activity between BioM and Kawasaki King Skyfront.

About Kawasaki City Coastal Area International Strategy Headquarters and King Skyfront

Kawasaki City has long supported and developed Japan’s economy as one of the world’s leading industrial cities. In particular, the Kawasaki coastal area occupies almost 20% of the city area and plays a major role in driving the Japanese economy. Through several initiatives and projects, the Kawasaki City Coastal Area International Strategy Headquarters has been developing and internationalizing Kawasaki city and especially the coastal area. With the aim to 1) support citizen services and employment at the centre of becoming and remaining a powerful industrial city as well as 2) become a region that can be an example to the world as an industrial base (including companies and various other stakeholders), Kawasaki City Coastal Area International Strategy Headquarters has developed a 30 years Coastal Vision, that started from 2019. In this strategy, against a backdrop of an ageing society and a concentration of the population towards the Tokyo area, Kawasaki City emphasized the importance of the coastal area with its King Skyfront as an international strategic base for life science, hydrogen and new industry projects. In this sense, the coastal area will be targeted for the creation of development and employment in the area through an increase in sales and investments by companies. Consequently, this process will drive improvements of citizen services and an increased income of the working people.

King Skyfront is an innovation hub for the creation of new industries and advanced R&D in the fields of life science and environment, located in the Tonomachi area. It plays an important role in Japan’s growth strategy through its contribution to solutions to a variety of issues including health, medicine, welfare, and environment while also creating global businesses in these fields. King Skyfront consists of small and big companies and research institutes, functioning as a biotech cluster.

About BioM

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BioM, or BioM Biotech Cluster Development GmbH, was founded in 1997 under the authorization of the Bavarian Ministry of Economic Affairs and forms the Bavarian regional network organization of the biotechnology sector. The cluster counts approximately 270 biotechnological and pharmaceutical companies, mainly located in the metropolitan area of Munich. The cluster’s specialization is the development of innovative therapeutics and diagnostics, especially for personalized healthcare. The cluster management offers a broad range of information about the sector for prospective customers from home and abroad, in addition access to training sessions, events and network meetings for experts as well as for SMEs. The cluster also provides consulting and specialized coaching, training and mentoring programs, tailored to the needs of especially SMEs within the cluster network82.

Results of the interview

Kawasaki city and German biomedical cluster BioM have signed a MoU for the first time in 2017. According to Mr. Naekura, Mr. Kono and Mr. Kidera, networking activities in the biomedical industry between Japanese and EU entities are not rare, as the importance of collaboration with clusters is getting more and more well known as something beneficial. Also, on the local level, there are many networking activities taking place in Kawasaki city between Japanese and foreign clusters and companies.

The underlying drivers for internationalization with EU counterparts in general from Kawasaki cities viewpoint was the formation of King Skyfront and its strategic location. King Skyfront is located close to Haneda airport, Tokyo city and Yokohama city and in order to create more innovation, a cooperation with foreign entities was a goal from the start. This could be facilitated by the relocation of the National Institute of Health Science to King Skyfront, which already had an international network, facilitating easy connection to foreign entities. Moreover, the attraction of large companies and/or their research institute. The build-up to the cooperation between Kawasaki city and BioM started in February 2017 with the visit of Kawasaki city to BioM in Germany. At that time, Kawasaki city visited several biomedical clusters in Germany and in the US. The reason why they chose the EU and the US was that, especially in the EU, cluster landscapes were relatively well developed. Within the EU, Kawasaki city was especially targeting German clusters because of the fact that Germany as well as Japan had some similar industries, such as the automotive industry. Furthermore, German clusters had funding available for cooperation activities with Japanese entities because of the internationalization program by the BMBF. However, because the communication and the organization of meetings etc. between Kawasaki city and BioM was smoother than with the other clusters, including Biocom in the US and because BioM showed most interest in cooperation with Kawasaki city, both parties agreed on starting cooperation afterwards. The high interest of BioM in cooperation with Kawasaki city can be explained by, according to Mr. Naekura, Mr. Kono and Mr. Kidera, the fact that BioM was looking for one more Japanese partner next to Osaka, whom they were already cooperating with. After the initial visit of Kawasaki to BioM in February 2017, BioM made a visit to Kawasaki city in July 2017. Upon this event, Kawasaki city and BioM signed their first MoU. This MoU had a duration of 2 years, so a new MoU was signed afterwards. The new MoU has a duration

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of 3 years. Although Kawasaki city aimed for an MoU of 5 years, the funding program on the German side only allows 3 years of cooperation under the funding of the Bavarian Ministry of Economic Affairs.

The **goal of the cooperation is to establish entry points** for Bavarian life science companies in the Kawasaki region and for Kawasaki life science companies to establish an entry point in the region of Bavaria respectively. Furthermore, the parties aim to create a general framework for further sector-specific agreements and to create joint programs. Moreover, the cooperation aims to **build a long-term relationship** for the benefits of each regions enterprises as well as the exchange of sector-specific knowledge and advice. Against this backdrop, activities within the cooperation scheme consist mainly of **joint R&D projects** as well as **business matching**.

**Challenges** faced during the cooperation as mentioned by Mr. Naekura, Mr. Kono and Mr. Kidera is the **creation of concrete results** out of the matchmaking processes and joint R&D projects as set up by Kawasaki and BioM. Another challenge for the side King Skyfront is that **SMEs and venture members are often not interested in internationalization**. This could be explained by the fact they don’t have enough resources to do so and because of their short-term focus, according to Mr. Naekura, Mr. Kono and Mr. Kidera. Even through some SMEs and ventures are interested in the idea for internationalization, they often regard internationalization as too risky.

The **benefits** of the cooperation, as stated by Mr. Naekura, Mr. Kono and Mr. Kidera is that the cooperation itself helps King Skyfront with its **recognition worldwide**. Through the partnership, King Skyfront is able to improve its global position and to brand itself as an international cluster. Perhaps even more important is the **access to networking opportunities** for the King Skyfront members through their participation in seminars in which oversea partners members are present too. Another benefit of the cooperation is the **cost advantage** that member companies involved in cooperation with foreign entities gain from having more orders.
Basque Energy Cluster, Spain - Fukushima Energy Agency, Japan

Sector: Energy

An interview Mr. Marcos Suárez García, Project Manager of Basque Energy Cluster, Spain was conducted in order to discuss the cluster-to-cluster cooperation activity between the Basque Energy Cluster and Fukushima Energy Agency.

About Basque Energy Cluster

The Basque Energy Cluster is a non-profit organization set up in 1996. The mission of the organization is to improve the global competitiveness of the Basque energy sector companies though facilitating industry-driven collaboration along the entire value chains and pursue public-private partnerships. The Basque Energy Clusters vision is to contribute to the positioning the Basque Country as one of the European references in the energy industry sector in specific energy fields. The cluster counts more than 170 members located in the Basque Country, including leading companies in the energy sector as well as agents of the Basque Science, Technology and Innovation Network and public administration bodies related to the energy sector.

The Basque Energy Clusters main activities consist of the organization and coordination of all kind of meetings and joint activities between its members and external stakeholders. Furthermore, the Basque Energy Cluster actively organizes periodical meetings and manages workshops in order to identify requirements, opportunities and points of common interest. Also, specialist organizations with the right knowledge and greater general perspective of each area within the cluster coordinate, guide and follow-up the collaboration projects and activities launched by the involved Working Groups. The cluster also helps its members to identify emerging technologies and business opportunities though the analysis of market opportunities and activities of the energy sector

About Fukushima Energy Agency

As stated previously, Fukushima prefecture has placed importance on the development of the regional renewable energy industry after the Great East Japan Earthquake and the nuclear accident. In order to achieve this goal, the prefecture has commissioned the Fukushima Energy Agency in 2017 with the goal to increase the number of companies in the renewable energy industry and thus is planned to be the main driving force behind the prefecture’s goal. The activities of the Fukushima Energy Agency consist of focused and continuous support for the creation of joint projects between industry and academia, networking opportunities (networking events, seminars and study tours), market development, overseas expansion and to coordinate exhibitions. As the agency also promotes the utilization of research outcomes through an industry-academia-government network, the agency

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has similar responsibilities of a cluster management organization. Therefore, the Fukushima Energy Agency is in this report regarded as a cluster organization.

Results of the interview

Mr. Suarez has the impression that cooperation with Japanese entities in the field of renewable energy is rare in Spain. Regarding cluster associations, he is only aware of their own case. This fact may be due to the fact that the Basque Country is the main industrial regions in terms of renewable energy in Spain. In Europe, cooperation with Japanese entities in this area is less unusual.

The Basque Energy Cluster has a yearly renewable MoU with Fukushima Energy Agency, signed in 2019. Due to the natural disaster in 2011, the Japanese Government selected Fukushima as a leading region for the development of renewable energy in the country. In this sense, the regional energy agency is rather new as it was established in 2017 and the region still does not have a strong network of companies working in some of the renewable energy fields, such as wind energy. On the contrary, the Basque country is one of the regions with more tradition in this area. The build-up to the signing of the MoU started with the visit of the Basque Minister of Economic Development and Infrastructure, Arantxa Tapia to Fukushima in late 2018, initiated by the Basque County. The aim of the visit was to promote the Basque Countries commerce in Japan and to identify areas of possible technological cooperation through meetings with management staff of various companies in the automotive, renewable energy and society 5.0 sectors. A few months later, early 2019, a delegation from Fukushima Energy Agency, a young cluster actively looking for opportunities, visited the Basque country in coordination with Basque Trade and Investment. Upon this occasion, the delegation expressed its strong interest in cooperation. Later in 2019, Fukushima Energy Agency visited the Basque Country again upon which the Basque Energy Cluster and the Fukushima Energy Agency confirmed their willingness to cooperate, especially in wind, solar and hydrogen. The two associations signed a MoU in May 2019, while later that year the Governors from both Fukushima and Basque Country signed another MoU covering both the energy and other sectors.

Although Japan was not necessary a priority country for cooperation for the Basque Energy Cluster in the field of energy, the relationship highlighted the interest of the Japanese market as an opportunity for expansion. Hence, Fukushima would be an interesting partner for the internationalization of the Basque Energy Cluster. After the clusters connected, several companies within the Basque energy Cluster were interested in collaboration with the Fukushima Energy Agency.

The cooperation is based on finding each regions strengths and weaknesses while exchanging information. As Fukushima Energy Agency is mainly interested in the wind energy there is a focus on the preparation on the formation of joint venture companies in this field. Thus far, no joint venture companies have been established yet, but the first are expected to be started in the near future. Moreover, activities in hydrogen and solar energy are expected to take place in the form of joint R&D projects and ventures. Since the cooperation activity is still new, there has been no tangible results so far, but Mr. Suarez Garcia is positive that there will soon be some outcomes as a high amount of cluster

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partner companies of both the Basque Energy Cluster and the Fukushima Energy Agency have high interest in collaboration. This process gets facilitated by the fact that comparatively, the way of doing business in the Basque Country has some connections with the way of doing business in Japan which makes cooperation easier. What would facilitate an even better cooperation environment, would be the acquisition of more knowledge of the counterparts. In this sense, training programs could be helpful. The main challenge mentioned was the language barrier, but this is often being solved by the mediation of an interpreter.
**Organic Electronics Saxony, Germany - Yamagata University Innovation Center for Organic Electronics, Japan**

**Sector: Electronics**

An interview with Mr. Tatsuhiro Takahashi, YU-FIC Director of Operations, Japan has been conducted in order to discuss the cluster-to-cluster cooperation activities between the OES cluster in Germany and Yamagata Universities INOEL under the framework of the Flexible Electronics Japan-Germany International Collaborative Practical Utilization Consortium (YU-FIC) framework, as well as other types of long standing cooperation activities between Yamagata prefecture and the State of Saxony, Germany.

**About Yamagata University Innovation Center for Organic Electronics (INOEL)**

The Yamagata University Innovation Center for Organic Electronics (INOEL) was established in 2013 and has the goal to **promote the research and development of practical technologies of organic electronics through promotion of academia-industry collaboration in order to address corporate needs.** The center thus aims to develop global cutting-edge practical technologies of organic electronics which can be commercialized directly by collaborating companies. To facilitate this process, the Center has professors with vast business experience in the field of organic electronics at private companies, so they can contribute to the goal of the Center from a viewpoint of business. As for the funding, INOEL has a self-supporting accounting system in which they acquire private finance and external funds in order to exist. INOEL works within six domains of research & development, namely 1) organic EL (OLED), 2) organic transistors (OTFTs), 3) organic photovoltaics (OPVs), 4) flexible technology (flexible substrates, gas barrier, flexible encapsulation, etc.), 5) inks and 6) batteries. As Mr. Takahashi explained, **INOEL acts as the cluster organization of a national cluster in the organic electronics field**, as their member companies and R&D Centers are located across Japan⁸⁷.

**About Organic Electronics Saxony (OES)**

Organic Electronics Saxony (OES) is a **German cluster founded in 2008 with members in the organic sector with the aim to strengthen the organic center regionally, in Saxony, as well as globally.** The state of Saxony and especially the region of Dresden has a high concentration of companies and research institutes in organic semiconductor R&D and manufacturing. The cluster consists of more than 39 companies and 16 research institutes covering the whole value chain starting at universal fundamental research up to high end technological products. The Organic Electronics Saxony cluster management provides its members a competence network to concentrate their interests and supports each member individually by applying and coordinating regional, national and European level projects, organizing conferences, workshops and symposia, supporting especially SMEs, placing financial support. Representing the regional organic and printed electronics community, providing

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training and education and lobbying within the regional and national government and the European Commission.\[88\]

**Results of the interview**

The State of Saxony and Yamagata prefecture have several cooperation projects. According to Mr. Takahashi, Yamagata prefecture is a leading electric and electricity industrial area in Japan. Against the backdrop of Yamagata Universities focus strategy to become a world leading centre for organic electronics, the cluster was formed with the help of MEXT and METI through the Japanese Governmental Strategy for Strategic International Innovation Promotion Areas. This national strategy aimed to create economic growth in certain areas by using the potential of universities. Within this framework, Yamagata prefecture has been active on the international stage through two strategic cluster-to-cluster collaborations. One of the collaboration activities has been set up through the **Cluster Internationalization Program by BMBF** with the goal to accelerate product development and one of the collaboration activities has been set up by the **RIT program by JETRO** with the goal to stimulate the regional economy of Yamagata Prefecture by internationalization of SMEs. The first collaboration participants are OES and Yamagata Flexible Organic Electronics Practical Foundation Technology Consortium (YU-FOC), with Yamagata University at its core. The second collaboration participants are the Saxony Economic Development Cooperation and the Regional Industrial Cluster Yonezawa for New Industry Creation. During this interview, the collaboration between OES and Yamagata University has been discussed.

**YU-FIC** is the name of the Flexible Electronics Japan-Germany International Collaborative Practical Utilization Consortium, a collaboration led by INOEL in Japan and the OES in Germany.\[89\] The underlying drivers for the start of this cooperation came from both sides, as INOEL as well as OES were looking for partners to complete their supply chain. Initially, INOEL has visited many other regions to identify potential cooperation partners, but OES (at the time participating in the internationalization program of the BMBF and was likewise searching for partners) was regarded as the best fit, as stated by Mr. Takahashi. This strategic cluster-to-cluster cooperation has been active since 2010 and has the goal to accelerate product development in the organic electronics field. The cooperation activities between the Japanese and the German counterparts are settled through several MoUs on the **project level** as well as between **entity level** (INOEL and OES) and on the **cluster level**. The cooperation was set up because of both parties the perception of a business interface and willingness to collaborate on innovation leadership from both the German and the Japanese side, through the German side’s participation in the internationalization program of the BMBF. Mr. Takahashi moreover mentioned that INOEL as well as OES were looking for ways to complete the supply chain, which would be possible through cooperation with each other especially in the field of development and commercialization of (flexible) organic printed electronics. Through cooperation, INOEL and OES aim to develop prototype **products** in this field ready for **commercialization**, for example a flexible printed sensor that can be used for measuring body temperature, pulse and breathing. The management of both counterparts meets twice a year face-to-face, one time at the annual nanotech event held in Tokyo and one time in Dresden. Moreover, skype meetings with the management members take place every two weeks.

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Additionally, the counterparts organize strategic intercultural training sessions by Mr. Dominik Gronarz, cluster manager of OES and owning an instructor license.

**Challenges** faced during the cooperation activities as mentioned by Mr. Takahashi was mainly related to **miscommunication on the business level** on the topic of the prototypes and occasional delays in sending them due to a language barrier on the Japanese side. Mr. Takahashi stated that when such problems occur, the cluster management teams on both sides of the collaboration helps to resolve them. Furthermore, Mr. Takahashi mentioned that some of the companies within the clusters in Germany and in Japan are **seemingly competitors**, which is why some companies are initially not willing to cooperate. When this type of problems occurs, the management of both cluster organizations act as mediators to identify each company’s concerns and merits. This helps, according to Mr. Takahashi, because companies that are seemingly competitors often realize that they are not with the intervention of such mediation activities. Moreover, Mr. Takahashi mentioned that **overtakings in management structures** sometimes pose difficulties to the cluster-to-cluster cooperation. Additionally, the **lack of funding on the Japanese side** on the cluster-to-cluster collaboration projects poses a challenge to the activities within YU-FIC, which has been funded mainly by the German side.

Despite the challenges faced, Mr. Takahashi is positive about YU-FIC and **hopes on furthering the collaboration** between INOEL and OES in aspects like the **tackling of common social issues** like aging. Furthermore, Mr. Takahashi expressed his hopes to be able to convince Japanese (government) organizations such as MEXT, METI, JST and NEDO of the importance of funding opportunities for group-to-group collaboration activities like YU-FIC, through meetings with key persons.
Power Electronics Cluster, Germany - New Generation Power Electronics and System Research Consortium of Japan (NPERC-J), Japan

Sector: Electronics

An interview Mr. Peter Rechberger, Project and Innovation Manager at European Center for Power Electronics, Germany has been conducted in order to discuss the cluster-to-cluster cooperation activities between the Power Electronics Cluster, Germany and the New Generation Power Electronics and System Research Consortium of Japan (NPERC-J), Japan.

About the Power Electronics Cluster

The Bavaria region has a large amount of companies and institutes in growth industries in the areas of mechanical engineering, electrical engineering, and the automotive sector. The vast presence of these areas in the region have resulted in a large amount of jobs directly involved in research and development, production, sales, and services in the field of power electronics, a key technology for the aforementioned growth industries. Against this backdrop, the Cluster Power Electronics, located in the Bavaria region, organizes specialist events, initiates and supports cooperation and research projects, sponsors joint trade fair participation and executes qualification measures. Furthermore, the cluster is involved in recruitment measures for secondary education students, teachers, and university students90.

The cluster is part of the European Center for Power Electronics e.V. (ECPA), an industry driven research network with the aim to promote education, innovation, science, research and technology transfer in the area of Power Electronics on the EU level through competitive research, education and advanced training as well as public relations for power electronics in Europe. The network was founded in 2003 on the initiative of the 8 leading companies of power electronics industry.

About the New Generation Power Electronics and System Research Consortium of Japan (NPERC-J)

The New Generation Power Electronics and System Research Consortium of Japan (NPERC-J) is an organization founded in 2014, that creates open innovation with academia as well as industry members in the field of ICT and electronics through research consortium activities on a national scale91. Academia members and industry members collaborate to decide on research themes and targets through research surveys and road-mapping activities. R&D results made by collaborative projects amongst academia members are then openly transferred to the industry members. The focus topics of the research consortium is on non-and pre-competitive research areas, including reliability science, future power devices and materials, power converters and power network systems. The

goal of NPERC-J is to realize a low carbon society through energy saving, environment preservation and economic development.\footnote{New Generation Power Electronics and System Research Consortium of Japan: “Philosophy of NPERC-J”, NPERC-J website: \url{http://www.nperc-j.or.jp/organization_en/}}

Results of the interview

The Power Electronics Cluster has an ongoing cooperation activity with the New Generation Power Electronics and System Research Consortium of Japan (NPERC-J) on the organizational level.

According to Mr. Rechberger, cooperation with Japanese entities in the power electronics sector isn’t rare in Germany and in the sector as a whole as well. Mr. Rechberger explained that the reason for this is that Japan has an extensive research presence in this field, in Japan as well as in the EU. There are lots of German power electronics related companies in Japan, and the same applies to vice versa. It should be noted though, that according to Mr. Rechberger, German power electronic companies in Japan are, interestingly enough, relatively closed off of research and invocation activities and consortia in Japan, whereas Japanese power electronic companies in Germany are not.

The \textbf{underlying drivers} to start the cooperation for the German side was the fact that \textit{Japan has a high amount of technological experience} with high requirements in the power electronics field. Furthermore, Mr. Rechberger mentioned that \textit{Japan has a well-developed power electronics research landscape}. This made Japanese entities like NPERC-J an attractive potential partner for the Cluster Power Electronics. The cooperation activity was initiated by the German side, through the BFMR internationalization program with the help of the contacts of the ECPA. The president of the ECPA had \textit{long standing contacts with NPERC-J} already, because previously, NPERC-J had a project with Siemens AG which is one of the industrial members of the ECPA. Against this backdrop, an informative cluster symposium was held by the German Embassy in collaboration with MEXT and NEDO about the general activities of clusters. This event also connected the German clusters interests with the Japanese side’s interests, as it was clear that they would be interested in collaboration activities with Germany in the technology sector. After the cluster symposium in 2015, an \textbf{MoU was signed between the Cluster Power Electronics and NPERC-J and the cooperation activities started in 2016}. The MoU has \textbf{no intended deadline}, but the project set up by the parties lasts until 2024.

The cooperation has two phases, in which the \textbf{first phase} mainly served to strengthen ties in the form of discussions on hard as well as soft topics on how to cooperate and what market segment to target, Japanese business seminars and the creation of a joint roadmap. During the second, current phase, cooperation takes place in the form of joint R&D projects, exchanges between researchers, information and material. The \textbf{goal of the cooperation is to work along with the joint roadmap with specific projects, which are to be found along the way}, as explained by Mr. Rechberger. There have been no concrete results in the context of R&D outcomes so far, as the second phase started only recently. At the moment, two projects are running simultaneously, both following the joint roadmap and running well so far. Furthermore, both in Germany and Japan tech workshops and conferences are being organized. The last conference held in Osaka went well according to Mr. Rechberger.

According to Mr. Rechberger, \textbf{challenges} were mainly faced during the first phase of the cooperation. Often, the German side had to get used to repeating themselves for the Japanese side’s confirmation.
on their understanding of their ideas. Furthermore, Mr. Rechberger mentioned that it was difficult to get used to having meetings in which no concrete decisions are made. Sometimes, after meetings the German side has the impression that the Japanese side had agreed with something discussed during meetings but later it often turned out that the ideas discussed were off the table after all. In other words, it was difficult to find common denominators. Added should be, as Mr., Rechberger stated, that these problems could also have been arisen because NPERC-J was a brand-new organization and could possibly have been dealing with internal challenges as well. However, Mr. Rechberger shared that after the basic decisions had been made, the cooperation became much easier.

As for the benefits of the cooperation, Mr. Rechberger shared that there were many. The exchange between information and new materials that might be relevant to the market in the future is one of the main benefits. Furthermore, Mr. Rechberger stated that is very positive about the creation process of the joint roadmap, because both parties had different ideas on which type of technologies will be relevant for the market in the future. This way, both parties have heard new ideas which they didn’t think of themselves without the discussions with their counterparts.
Cosmetic Valley, France - Japan Cosmetic Center (JCC), Japan

Sector: Cosmetics

An interview with Ms. Matsunaga and Ms. Paro of Japan Cosmetic Center was conducted in order to discuss the cluster-to-cluster cooperation activities between Cosmic Valley, France and the Japan Cosmetic Center (JCC), Japan.

About the Japan Cosmetic Center (JCC)

The Japan Cosmetic Center is located in Karatsu City, Saga Prefecture. It is a local association in the cosmetics field through cooperation between industry, academia, and government, and it aims to create a globally strong cluster in the cosmetics industry, utilizing the local resources. The Center also aims to contributing to the regional revitalization of Saga prefecture through the establishment of companies, academic research and human resource educational institutions and the creation of domestic and overseas economic transactions. JCC has more than 170 members and 26 support organizations, including 14 different universities and governments (as of March 2020).

About Cosmetic Valley

Because of the existence of a high concentration of companies in the cosmetics industry in and around Paris from the 1970s onwards, the first network in the cosmetics industry was set up in 1994 by the ones who were involved. The network was supported by local authorities, the Regional Council and the City of Chartres, and it was eventually recognized as a cluster in 2005 with the embarkation of a new economic policy by the State with the aim to create competitiveness clusters. Since then, universities and other training bodies joined, bringing in their expertise. Nowadays Cosmetic Valley spreads across three regions: Centre, Ile-de-France and Upper Normandy93 and became a leader in perfumery cosmetics resources and contributes to the development of the perfumery cosmetics sector. Cosmetic Valleys mission is to develop the perfumery cosmetics sector in France and in doing so, the cluster is committing to a joint approach based with a focus on innovation and overseas market expansion. Activities of the cluster organization are networking activities, research and innovation project support, overseas market expansion support for companies and training94.

Results of the interview

The build-up to the cooperation between the Japanese and the French cosmetics clusters started with the visit of the former president of the Cosmetic Valley, Mr. Muller, in 2012. The underlying driver for his visit as well as the start of the cooperation between JCC and Cosmetic Valley later was his specific interest in Japan and its unique resources and cosmetic ingredients. Mr. Muller is also the CEO of his own natural cosmetics company in France and at that time he was looking for ways to expand his

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business to Asia. When he first visited Karatsu in order to meet some of the companies that work in the cosmetics business, like Bloom Co. Ltd, that has been operating in Karatsu for a long time as cosmetic analysis facility and cosmetic import representative, Mr. Muller was impressed by the **characteristics of Karatsu city**: he saw a great value in the area since Karatsu has a very **suitable environment for the cultivation of ingredients that can be used for the development of natural cosmetics**. Karatsu city at the time already had a quite developed cosmetics industry, and the geographical location of Karatsu is attractive for the international business as it lies close to Asian countries reducing the logistic lead time from and to Japan. Mr. Muller saw the potential of the area for the formation of a cosmetics cluster, which was why he suggested the idea to the local government. In 2013, a first cooperation agreement between Karatsu city and the Cosmetic Valley was signed. After that, thanks to the support of the local government of Karatsu city and Saga prefecture, Japan Cosmetic Center (JCC) was officially established, and the relationship between Karatsu city and the Cosmetic Valley continued together with the will of strengthening their future exchange cooperation. This took the form of the signing of a **MoU** between the Cosmetic Valley and the JCC in **2015**. In the same year, JCC started the cooperation with other cosmetics clusters: Beauty Cluster Barcelona, Spain; Polo Tecnologico della Cosmesi, Italy. One year later in 2016, the JCC also signed cooperation agreements with the Taiwan Beauty Valley, Taiwan and with the Thai Cosmetic Cluster, Thailand.

There is **no deadline** on the cooperation agreement between JCC and the international clusters. The mission and vision of JCC as well as the local government (Karatsu city and Saga Prefecture) specifically go together with the needs of JCC cluster members and the local industry. The aim is to build a common industry platform that provides services to the local companies and boosts their business, attracting also new companies with the same vision to join the cluster.

For what concerns the mission and expected goals from the cooperation between the Cosmetic Valley and JCC, the first main goal is to create business matchings between the respective member companies and to **promote general business exchange** among the two countries. Some of the outcomes are, for example, **joint research projects** with overseas partners. It’s the case of the R&D joint venture and project between Matsumoto Trading Co, Ltd. and Alban Muller International SAS for the development of new local and original cosmetic ingredients in Japan. Another outcome of the cooperation between Cosmetic Valley and JCC has been the **growth of the network with other cosmetic clusters** that were connected to the Cosmetic Valley and the setup of an ongoing project to create a community of all cosmetic clusters around the world with annual events, meetings and common projects. Furthermore, the business matching of the respective members leads to successful import and export contracts of French and Japanese cosmetics.

Looking back over the past years, from JCC perspective, there have been not so many **challenges** faced during the cooperation activities. If JCC had to mention one, they could say it is the similarity between both clusters members, which sometimes poses difficulties since the companies usually have the same goals (mainly the sales of products) which may result in **competition**. However, some of these matching brought to the cooperation of similar companies with the exchange of complementary technologies. Other challenges arise from the fact that **SME members within JCC often lack the know-how** on how to approach other companies for collaboration, which is why JCC extensively helps them through the process. The **benefits** of the cooperation activity between JCC and Cosmetic Valley, as mentioned by Ms. Matsunaga and Ms. Paro, are diverse. One of the most important benefit from the viewpoint of JCC is that, as a relatively young cosmetic cluster as compared to Cosmetic Valley, **JCC can learn a lot from Cosmetic Valley** and have a growth model to follow. Plans for the future to further
the cooperation between both clusters activities exists in the form of the preparation of a new project that will start this fiscal year and aims to create a support system of new startup companies in the IT-cosmetic business.
2.3.3 EU-Japan region-to-cluster cooperation

**Medicen Paris, France – Osaka prefecture, Japan**

**Sector: Life science**

An interview with Ms. Blandine Hirtz, International Project Manager at Medicen Paris, was conducted in order to discuss the cluster-to-region collaboration activities between Medicen Paris Region and Osaka Prefecture.

**About Medicen Paris**

Medicen is one of Europe’s largest cluster in Life Sciences and Healthcare, founded in 2005. The cluster connects leading research institutes, innovative SMEs, large companies, hospitals, incubators and regional authorities of the Paris region. The goal of the cluster is to define excellent innovation policy, to develop growth and employment, to strengthen the international competitiveness and attractiveness of the French health ecosystem.

The cluster has around 250 members, of which 200 SMEs to be categorized under five different technological areas: diagnostics, biomarkers, companion diagnostics, reagents and laboratory equipment⁹⁵.

**About Osaka prefecture and it’s industries**

According to JETRO’s mapping tool, Osaka prefecture has a well-developed energy and life science industry. The environment and energy industry, especially hydrogen and fuel batteries, is highly concentrated in the Osaka bay area and a succession of proactive investments on equipment in the battery industry is due to be made in the future, which will hopefully stimulate the development of the industry. The development of the energy industry is backed by the prefectural government in their 2016 “H2Osaka Vision”, a roadmap on efforts in the area of hydrogen and fuel batteries for the future. Moreover, Osaka prefecture aims to develop new energy-related industries and a low-carbon society through the Battery Strategy Research Center.

As for the life science industry, Osaka prefecture has a concentration of world-class research facilities such as Osaka University, the National Cerebral and Cardiovascular Center and the National Institute of Biomedical Innovation, Health and Nutrition, located mainly in the northern part of the prefecture. Additionally, many pharmaceutical manufacturers are located in Osaka City. The prefectural government has been promoting the life science industry throughout Osaka prefecture in accordance with the “Osaka Bio Strategy”. This strategy contains a roadmap with the goal to create active industry-academia-governmental collaboration in the life science industry based on the presence of the universities and was formulated in 2008. Against this backdrop, a variety of initiatives are being implemented including the establishment of funds, facilitation of clinical tests and reformation of

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regulations. At the same time Osaka Bio Headquarters was commissioned by the prefectural government. The organization is led by the prefectural governments’ Life Science Industry Division, and its activities include the management of networks, business development, overseas market expansion, information services and participation in international conferences.

Results of the interview

Medicen Paris is collaborating with many Japanese partners, such as Link-J, Kawasaki city, Kobe city and Osaka prefecture. During the interview, the collaboration activities with Osaka prefecture were covered.

According to Ms. Hirtz, collaboration between Japanese and EU entities as well as Japanese and French in life science and healthcare is common. One example of another French cluster that has collaboration activities with Japanese partners is BioPol, as Ms. Hirtz mentioned.

Medicen Paris established contacts in Japan through two separate EU programs: the LASER-GO GLOBAL project and the EIT Health Start.Global Project. The first project is a co-funded program by the COSME programme of the EU, launched in 2018 through collaboration of partners from Lithuania (Coordinator), France, Austria, Spain and Germany. The aim of the project was to create a pan-European network in the field of cross-sectional health-photonics technology representing companies and research institutions in the fields of medicine, biotechnology and photonics. The project activities consisted of the creation of business opportunities for the partners in the targeted export markets, among which Japan. The other target targeted export markets were Australia, New Zealand, Canada (Quebec), Israel, Singapore, South Korea and the USA. The realization of the creation of opportunities was done by sharing experiences on emerging markets, setting up trade missions for SMEs and representing EU entities and products at events to initiate leads and sales. The second project was a EIT Health funded training course developed by BioM within the EIT Health’s framework of its Accelerator programme called “GoGlobal” launched in 2019. The training course targeted EU life science SME executives and provided them with information on the Japanese and South Korean business environments and markets, specifically on regulatory aspects, language and cultural challenges, business conventions and market needs, opportunities and competitors as well as access to appropriate customer networks and funding and financing opportunities.

The underlying driver for participation in the two projects targeting the Japanese market (amongst others) was that the companies of Medicen Paris showed their interest in expanding their businesses to the country. Japan was targeted by these companies because both the EU and Japan as well as the USA and China have a well-established biotechnology and healthcare industry and are big players globally. The companies were also interested in the sharing of knowledge.

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98 Osaka Bio Headquarters: “What is Osaka Bio Headquarters?”
Through the Start.Smart.Global project, various companies of Medicen Paris went to Bio Japan, an annual partnering event for the global biotechnology aiming at business development, licensing, and alliance management professionals, R&D personnel, and biotech company executives\(^\text{101}\). Here, contacts with JETRO, Kawasaki city and with Link-J were established. Through the LASER-GO GLOBAL project, some of Medicen Paris’ companies went to Japan for a European Biotech and Pharma Partnering Conference in Osaka in 2019 in order to develop networks amongst Japanese businesses and other entities such as universities. Here, long-term contact between Medicen Paris and Kobe city as well as Keio University was established. This process was facilitated by the contacts of BioM, as they already had an established network in Japan. Cooperation activities between Medicen Paris and Osaka prefecture also started through the same activities.

The cooperation with Osaka prefecture, although not recorded in an MoU, consists of activities in the fields of joint R&D projects (individual collaborations) and business matching. The goal of Medicen Paris in these activities is to help their SMEs develop through knowledge sharing as well as setting up business missions and meetings during events. Results so far by the collaboration between Medicen Paris and Osaka prefecture have been collaborative agreements signed between companies in France and Japan. Challenges mentioned by Ms. Hirtz during the collaboration between Medicen Paris and Osaka prefecture is the communication. Here, according to Ms. Hirtz, notable information is often required by Osaka prefecture but sometimes Medicen Paris cannot provide those. Another problem Medicen Paris faces is the lack of understanding of the goals of Osaka prefecture and the time it takes to communicate because of the strong hierarchy on the Japanese side. It should be noted, however, that according to Ms. Hirtz, these communication problems are of minor concern. The benefits, however, are more obvious as Ms. Hirtz explained. These are the constant contact with the Japanese counterparts and resulting from that, the ability to rely on them for help with setting up meetings and the access to contacts and information whenever member companies or other members from Medicen Paris visit Japan and vice versa.

BioM, Germany – Osaka prefecture, Japan

Sector: Life science

An interview with Ms. Takeuchi Mieko, Life Science Industry Division Promotion Group, Growth Industry Promotion Office, Commerce and Industry Labor Department of Osaka prefecture was conducted in order to discuss the cluster-to-region cooperation activities between BioM and Osaka prefecture.

Results of the interview

Osaka Prefecture is cooperating with several EU counterparts in the life science industry. The EU counterparts involved are BioM Germany and BioXclusters. According to Ms. Takeuchi, cooperation between entities in the Kansai region including Osaka, Kyoto and Kobe are common in the field of life science and especially in pharmaceuticals, medical devices, health-related products, etc. On the national level however, Ms. Takeuchi couldn’t state anything about to what extent cooperation between Japanese entities and EU entities in the life science industry is common.

The cooperation between Osaka prefecture and BioM started in 2008 when Osaka prefecture attended a trade fair on Germany and met the representative of BioM there for the first time. Since the first meeting on the trade fair, Osaka prefecture and BioM have continuously organized more meetings afterwards at annual trade fairs in the US, in the EU and in Japan initiated by the manager of BioM and the coordinator of Osaka Bio Headquarters. Additionally, the counterparts have continued to exchange information through email. For Osaka Bio Headquarters, the underlying driver for their engagement with EU entities was that one of their goals is to support the overseas business expansion of the regional SMEs in the fields of life science. As the EU is advanced in this field, the EU was regarded as an important partner by Osaka prefecture and by Osaka Bio Headquarters.

Following the exchange of information and the meetings organized between Osaka prefecture and BioM, a MoU was signed in 2012 and with BioXclusters in 2016. Both MoUs have been renewed several times and the current deadline of the MoUs with both EU counterparts are set at October 2022. The goals of the cooperation activities with both EU counterparts is to 1) improve the awareness of each region's new technologies, industrial developments and academic potential in order to allow all network stakeholders to investigate collaboration potentials, 2) initiate industry-industry and industry-academia partnerships between entities in the involved regions, including joint research projects, drug development partnerships and cooperation in the field of marketing with a focus on companies including start-ups in biotech and pharma and research institutions, and 3) exchange best practices in technology transfer and biotech SME support between both network organizations. The activity within the framework of the cooperation in order to accomplish the goals is the organization of a biotech and pharma partnering conference for EU member countries and Japan in Osaka since 2016 on the day before BioJapan, Asia's Premier Partnering Event for the Global Biotechnology Industry. This annual event is being organized by EU clusters such as BioM and BioXcluster and Osaka Bio Headquarters, in cooperation with the EU-Japan Centre for Industrial Cooperation. This event is of important value for especially clusters from the EU when they visit Japan in order to meet potential partners and according to Takeuchi, through this event, several joint research projects have been launched.
**Challenges** faced by Osaka prefecture during the cooperation activity with BioM and BioXclusters, as mentioned by Ms. Takeuchi, is the need to constantly devising ways to hold business meetings in Osaka on an ongoing basis. Furthermore, as business matches are being organized at the event, the counterparts need to deal with the possibility of mismatching. In order to tackle this challenge, as Ms. Takeuchi explained, information on participating companies are being collected in advance and EU participants are asked whether they are sellers or buyers, what kind of strengths they have and what kind of companies they are looking for in order to search the right Japanese partner. Furthermore, interviews with participating European clusters and companies after the business meetings are being held in order to understand their needs better for the plan of next year’s event.

The **benefits** of the cooperation activity are the fact that **joint research projects** between and EU entities and Japanese entities are taking place. According to Ms. Takeuchi, Osaka prefecture is hopeful that this will improve the services provided by mutual cooperation organizations to members who support the business development of SMEs in the region and that this will deepen mutual understanding of the culture and business environment of Japan and EU countries. This is why Osaka prefecture is willing to expand their cooperative relationships with more EU clusters.
2.4 Other relevant types of EU-Japan cooperation as identified by the survey

**State of Brandenburg, Germany – Japan**

**Sector:** Several sectors, including energy, automotive, IT, medical care, environmental technology, tourism

An interview with Ms. Kirstin Wenk, Deputy Head of Department International Business, European Services at Brandenburg Economic Development Corporation, Germany was conducted in order to discuss the cooperation activities between the Brandenburg Economic Development Agency and Japan.

**About the Brandenburg Economic Development Agency (WFBB)**

Brandenburg Economic Development Corporation (WFBB) is the central contact point in the German State of Brandenburg for investors, entrepreneurs and technology-oriented business Start-ups. The agency offers services for business and employment promotion on an individual level, confidentially and free of charge through with expert knowledge, using close contacts, network partners and tailor-made service packages. The several services compromise help with setting up businesses, expansion of businesses, innovation, internationalization and networking, the provision of referrals for acquiring skilled labour as well as continuing education of employees, the provision of advice on questions regarding financing and promotion, as well as the provision of information on bureaucratic procedures.

Moreover, the Brandenburg Economic Development Corporation is also involved with implementing the State of Brandenburg’s regional energy strategy and approach their tasks within this strategy interdisciplinary. Therefore, the agency provides a basis for the development of energy related economic clusters in Brandenburg and the German Capital Region

**Results of the interview**

As told by Ms. Wenk, the International team serves as the regional contact point for Europe Enterprise Network (EEN) of the State of Brandenburg. Ms. Kirstin Wenk, in charge of Asia, Africa and Australia, has been dealing with Japan for a few years, including several visits in order to find a way to bring companies of the State of Brandenburg to Japan with the goal to foster export and import to and from Japan and to internationalize businesses, through business missions.

In this context, Ms. Wenk organized business missions to Japan in 2013 and in 2019 to Tokyo, Osaka, Kyoto and Saitama prefectures. Both missions were one to one and a half week long and the programs consisted of both framing programs for all participating companies and individual programs, tailored to each company’s interests/needs. Both times, an amount of 10-20 companies and research institutes from the State of Brandenburg took part in the missions. As reported by Ms. Wenk, these business missions were supported by funding from the EU in the context of the EFRD program and by the State of Brandenburg’s market entry program. The focus of the missions was initially on the energy

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sector, due to the fact that the State of Brandenburg has a high concentration of energy-related companies, which would match well with Japan because Japan was regarded as a pioneer in this sector. However, this wasn’t accomplished in the last mission in November 2019, as **many companies of different industrial sectors (automotive, IT, medical care, environmental technology, tourism) were interested in the mission to Japan** as well. Simultaneously to the last mission, a political delegation of Brandenburg also visited Saitama city to in order to celebrate the State of Brandenburg and Saitama prefectures twenty years of partnership.

The objectives of the participating companies were diverse, ranging from getting to know the Japanese market to establishing partnerships with Japanese companies. According to Ms. Wenk, the last business missions were successful, as **participating companies’ feedback has been positive**, as every company has been able to make strides. Some companies have found business partners, some companies have made strides in market entry. **Challenges** faced during setting up the event as stated by Ms. Wenk have been the **high cost and expenditures** for example traveling and room rents for companies and the **language and cultural barrier**.
BusinessOulu, Finland – Sendai city, Japan

Sector: ICT, Healthcare

An interview with Mr. Yasufumi Shiraiwa, Section Manager, Planning Section on the Aging Society Issues at City of Sendai, Former Section Director, Industrial Promotion Section at City of Sendai, Japan was conducted in order to discuss the municipality-to-municipality cooperation activities between the city of Oulu and the city of Sendai.

About Sendai city and the ICT industry

Sendai City has a high concentration of higher education institutions, including Tohoku University. One important characteristic of this university is their active promotion of joint research with the industry. Since the city has an abundant intellectual and human resources pool, many companies in the software and digital contents industries have located their bases in Sendai city. The city of Sendai boasts the Sendai-Finland Wellbeing Center103, which is a Sendai-based nonprofit organization that promotes a better quality of life for all generations between Finland and Japan. The organization was established in 2005 and is operated by Sendai Industrial Promotion Organization104.

About BusinessOulu

BusinessOulu is a public utility of the City of Oulu and is responsible for implementing the city's industry and employment policies through the promotion of activities for enterprise, employment and business in the region according to the principles agreed on by the City Board. Business policies of the City of Oulu aim to provide companies and entrepreneurship with an active environment that promotes the creation, operation, growth and competitiveness of companies, along with regional employment. BusinessOulu, together with the City Board, is responsible for developing and realizing this policy, which is implemented in collaboration with regional business operatives.

The organizations activities include development services for companies and promoting the internationalization of companies in addition to international business marketing of the city and attracting investment to the region105.

Results of the interview

Sendai city holds two cooperation agreements with Oulu city. The first agreement made is a Co- Incubation Agreement between Oulu and Sendai since 2005 and is signed by the mayor of Sendai,

the mayor of Oulu, the head of the Sendai Industrial Promotion Organization and the head of Business
Oulu. The second agreement made is an agreement between the cities of Sendai and Oulu and the
Oulu University of Applied Sciences for game and entrepreneurial education. The last cooperation
also includes an extended cooperation agreement between the Oulu University of Applied Sciences
and Tohoku University. According to Mr. Shiraiwa, cooperation agreements of this type are nor rare
throughout Japan, especially not in recent years as they have been increasing.

The buildup to the first cooperation agreement between the City of Oulu and Sendai started in 2001,
when the Finnish government approached the Japanese government with their wish to let Finnish
cities cooperate with Japanese cities on the field of elderly care and ICT through the exchange of ideas
and knowledge on these topics. A big underlying driver for the Finnish government for the approach
was the fact that one year before, the public elderly care insurance system was introduced in Japan
and in this context, the Finnish government saw opportunities to enter the Japanese elderly care
market with emerging Finnish SMEs and research institutes. Upon this, Sendai city received an
invitation to cooperate with Oulu city. Sendai city then won the competition for the partnership with
Oulu city in 2003. The first joint project started two years later, in 2005. A few months after the start
of the first project, a cooperation agreement was signed between Sendai and Oulu. Sendai city didn’t
aim for cooperation with EU entities before the invitation to cooperate with Oulu city, but saw the
opportunity to learn how the Finnish succeeded in ICT industries and its efficient use in elderly care
through the exchange of research cooperation which would in its turn result in innovation. The
cooperation is ongoing and has no deadline. The main activities within the cooperation scheme are
mainly business matching of SMEs in Sendai and in Oulu, facilitated by the Industrial Promotion
Section at City of Sendai and Business Oulu. In the period of 2005-2010, this activity resulted in about
35 matches and in the period after 2011, 45-50 new matches for business cooperation has been made.
Furthermore, there has been a few joint research projects between several universities in Sendai and
in Oulu in the field of elderly care and ICT technologies. Despite the focus on commerce in the first
cooperation agreement between Sendai and Oulu is on business cooperation, the cooperation activity
also includes more sister city-like cultural activities such as the Air Guitar Championship in Sendai.

The second cooperation agreement between Oulu city and Sendai city began when Ms. Takako
Uchida, Coordinator of International Affairs with Japan at Business Oulu and Mr. Shiraiwa met in Oulu
in 2013 when Mr. Shiraiwa was visiting with the purpose to find cooperation opportunities for
businesses in Oulu and Sendai. During this visit, NOKIA was seemingly doing less good and
unemployment in the Oulu region became an issue. At the same time, Sendai city had similar
economic issues because of the aftermath of the Great Eastern Japan Earthquake in 2011. Against this
background, a new cooperation project had been set up and started in 2014 by a former engineer of
NOKIA in Oulu to target unemployment and students through the creation of a game and
entrepreneurship education course at the Oulu University of Applied Sciences, which in its turn signed
a cooperation agreement with Tohoku University in Sendai last year, in 2019. This cooperation allows
exchanges between professors and students in a business development program.

Furthermore, the city of Sendai hosts a conference on disaster risk management every other year.
Last year in November 2019, SMEs from Finland, of which some from Oulu, were invited by City of
Sendai through JETRO. They participated in the conference as well as a hackathon event supported by
NOKIA. Upon this, Sendai city and the winner in the event agreed to cooperate on the development
of application which would enable Sendai City to provide real-time information for the visitors in
affected areas in the case of a natural disaster.
Mr. Shiraiwa is content with the cooperation activities between the city of Sendai and Oulu Business. He mentioned that the **language barrier is the main challenge** faced during the cooperation on the organizational level as well as the company level due to a lack of practice of the usage of the English language on the Japanese side. However, often this language barrier is lifted by the mediation of interpreters, a solution widely used in Japanese international cooperation projects according to Mr. Shiraiwa.
Demola Global, Finland– Hokkaido University, Japan

**Sector: various**

Two interviews: one with Mr. Itsuro Sugimura, Demola Hokkaido Operator Facilitator, Unit Manager at Hokkaido University Industry-Academia, Deputy Division Manager of the Hokkaido Regional Collaboration Promotion Organization and one with Mr. Ville Kairamo, CEO of Demola Global were conducted separately in order to discuss the cooperation activities between Demola Global and Hokkaido University.

**About Demola**

Demola is an international innovation challenge platform, consisting of students and companies. The platform and it’s trademark is owned by Demola Global, which was established in Finland in the Tampere region. The idea behind the start of the platform, as explained by Mr. Kairamo, came from a Finnish company that wanted to develop new ways of thinking, especially through connecting universities and corporations. The results of a survey they conducted showed that 90% of the participating businesses were trying to exploit universities in their human resources in some way. This gave the company the incentive to start to connect businesses and universities through a platform, Demola. The aim of the platform is to stimulate university students to create a better future through bringing together students, universities and leading companies in 18 countries: Finland, Sweden, Denmark, Norway, Spain, France, Lithuania, Latvia, Hungary, Portugal, Mexico, Namibia, South Africa, Slovenia, Japan, China, Nepal and Tunisia.

The main activity of the platform consists of eight-week projects in which company experts and university students collaborate on solving a complex innovation challenge set by the companies through creating solutions such as new service concepts and demos. This process is globally standardized and professionally facilitated. Furthermore, Contracts, intellectual property rights and other legal requirements are in place and meet international business standards and practices.106

In Japan, Demola has two member universities: Hokkaido University and Otaru University of Commerce. Hokkaido University was the first Asian university to join the platform. According to Mr. Kairamo, Japan was a target country for Demola because of the fact that businesses in Finland are interested in collaboration with entities like businesses and universities in Asian countries but are quite passive to start cooperation activities with them. As Demola aims for diversity, the participation of Japan is a strategic way to connect their businesses with Japanese counterparts.

**About Hokkaido University**

Hokkaido University, formerly operating as Sapporo Agricultural College, is one of the seven Japanese national universities, founded in 1876. The institution is noted in various subjects ranging from social

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106 Demola: “About us”, Demola website: [https://www.demola.net/about](https://www.demola.net/about)
and natural sciences to humanities. In 2015, Reuters included the organization in top 100 world’s most innovative universities. Hokkaido University main campus is located in the centre of Sapporo and has a good reputation for welcoming international students from more than 85 countries to combine best practices and to stimulate cultural exchange. Its teaching is based on the idea to turn the institution into a place, which will bring positive change to the world.

Hokkaido University has 34 faculties in a variety of disciplines, including law, medicine and economics and business administration. Hokkaido’s strongest research fields are chemistry, earth and ocean sciences and material sciences. The institution’s facilities range from hospitals, childcare centres, gardens and parks to experimental forests and parks108.

Results of the interviews

Demola Hokkaido is working together with the Finnish Demola site (Demola Global), since 2018. The site has been set up by the initiative of Hokkaido University. The university has close connections with Finland, as they have several partnerships with Finnish universities (University of Oulu, University of Helsinki, University of Lapland, Aalto University and University of Turku). Furthermore, Hokkaido Universities office to Europe is located in Helsinki, in the Tampere region, which’s aim is to broaden the links of Hokkaido University with Finnish universities as well as European and Russian Universities109. The Demola concept was introduced to Hokkaido through the exchange program contractors within Hokkaido Universities office in Helsinki and soon after, Hokkaido University decided to aim to become a member. Upon this, Mr. Kairamo of Demola Gobal came to Japan to explain the idea of the platform, where after a few visits to Demola Global in Finland by a Japanese delegation were made. Consequently, a cooperation agreement was signed in 2018. Although this MoU has a term of only one year, it is renewable, and Mr. Sugimura stated that he is convinced that the parties will agree to renewing the contract for a long time.

The underlying drivers to start the cooperation for Hokkaido was the access to the extensive Demola network through which Hokkaido companies and university students could internationalize. It would also open up many opportunities for students in the entrepreneurial education track at Otaru University of Commerce. Furthermore, as the culture in Hokkaido and the culture in Finland are similar according to Mr. Sugimura, Hokkaido expected the cooperation between Hokkaido and Finland to be pleasant. The latter was also a reason for Demola Global to reach out to Hokkaido specifically, over other regions in Japan.

There are several activities in the context of the cooperation. Through the network, SMEs as well as students from Hokkaido take part in the innovation challenge projects. Furthermore, SMEs from Hokkaido are being connected to international partners and Hokkaido University as well as Otaru University of Commerce conduct joint research projects with universities overseas. Moreover, university students from the participating universities are offered opportunities to do an internship at one of the Demola partner companies abroad. At the moment, activities within the Demola Hokkaido scheme are mainly outbound, but Mr. Sugimura explained that foreign student inbound projects are

being set up as of this moment. The goal of the Japanese participation in the Demola platform, as explained by Mr. Sugimura, is to develop an innovation mindset in companies and universities in Hokkaido and to open up opportunities for internationalization of students and globalization of Hokkaido SMEs.

The participation of Hokkaido in the Demola platform has had several beneficial results, according to Mr. Sugimura as well as to Mr. Kairamo. Through the joint projects with partners abroad, product development concepts as well as concept editing and education for employees has occurred through the participation of 15 companies and about 90 students from Hokkaido University and Otaru University of Commerce since the signing of the cooperation agreement in 2018, according to Mr. Sugimura. He continued to explain that also students now have more opportunities to enlarge their networks, connect with startups and to learn about the entrepreneurial mindset from an international point of view. The interview with Mr. Kairamo indicated that furthermore, matchmaking between Japanese and Finnish companies through Demola have resulted in 10 partnerships so far. Moreover, Japanese businesses that once participated in the Demola projects, keep coming back for continued participation in the projects. Thus, companies also benefit from the programs because they through the opportunities to talk to young people, they can develop innovative thinking skills and they have the opportunity to form partnerships through matchmaking services by Demola. Universities taking part in the program benefit from increased skills of their students which helps them with the recruitment process when they graduate. Furthermore, the students and researchers at the universities are exposed to new ways of thinking, which enabled to improve the participating universities global position as well as to boost the number of patents.

Challenges faced are mainly the language barrier, as explained by Mr. Sugimura. Students participating in the innovation challenge programs with foreign students and companies often are not able to keep up with discussions by the working groups. This is also the case for many Hokkaido companies taking part in these programs. Mr. Kairamo mentioned that from the Demola Global point of view, the main challenge is funding. As of the moment, Demola has a participation fee for its business members, which is a new concept to the Japanese member companies. Mr. Kairamo stated that although it is a universal problem that the industry side is often hesitant to cooperate with universities if they have to pay for it due to the act, they are not sure what’s in it for them, this is especially so in Japan.
Business Oulu, Finland - Kanagawa prefecture, Japan

Sector: Life science

An interview with Ms. Sato, Ms. Tanabe. Mr. Miura and Mr. Niizawa, members of the Advanced Medical Industry Group, Healthcare New Frontier Promotion Headquarters Office, Policy Bureau, Kanagawa Prefectural Government was conducted in order to discuss the cooperation activity between Business Oulu and Kanagawa prefecture.

About Kanagawa prefecture and KPG's Healthcare New Frontier (HCNF) Policies

The Healthcare New Frontier (HCNF) is a policy package designed by Governor Kuroiwa of Kanagawa Prefecture, which includes a bundle of healthcare, industrial and regional policies. Against the backdrop of a super-aged society in Japan and in other countries, HCNF aims for disease prevention to achieve a healthy longevity of the citizens of the prefecture through the development of the advanced medical technologies industry (including healthcare robots and healthcare ICT) and the advanced medical industry in the prefecture. Through the creation of innovative sites such as the Biomedical Cluster Kanagawa, the Life Innovation Center in the Tonomachi area, Kanagawa Prefecture has developed its advanced medical technologies industry and has introduced a new concept on physical and mental health called ME-BYO.

ME-BYO is a concept to indicate all changes of people's physical and mental conditions between healthy and sick, considering that their status changes continuously between these two conditions, as opposed to viewing health and sickness as two separate conditions. In order to visualize people’s ME-BYO status as to where in the healthy-sick spectrum they stand and encourage behavioral changes towards healthier side, Kanagawa Prefecture has been working towards the establishment of ME-BYO Index with the World Health Organization (WHO). The idea behind the ME-BYO concept is that the Japanese people, against the backdrop of a rapidly ageing society, need to improve their awareness and understanding of self-help through the continuous monitoring of their health. This approach on its turn aims to serve as a countermeasure against the draining public finances available for medical treatment expenses and the collapse of the government administration. In addition, the ME-BYO concept approach has the goal of allowing Japan to serve as a pioneer of ageing societies through representation of the healthcare sector as an opportunity for Japanese companies to enter markets overseas. Against this backdrop, Kanagawa Prefecture has established a global collaboration platform with both public and private sectors from the EU (Finland, Germany), the UK, Asia (Singapore, China and India) as well as the USA.

Results of the interview

Kanagawa Prefecture has been in cooperative relationships with Business Oulu (Finland), Oulu University (Finland) and with CWC Nippon (Finland) in the life science and medical development fields since 2014. Apart from these EU entities, Kanagawa Prefecture holds several MoU and cooperation relationships with other foreign entities such as the WHO, the Cell and Gene Therapy Catapult, UK; Scottish Development International; the State of Baden-Württemberg, Germany; the State of Liaoning, China; the Ministry of Ayush, India; the State of Maryland, US; the State of Massachusetts, US; Stanford University School of Medicine, US; and the Agency for Science, Technology and Research
(A*STAR), National University of Singapore (NUS), National University Health System (NUHS), Singapore. It could be said, according to Ms. Sato, that cooperation in the field of medical development and life science with EU entities and other foreign entities is not rare in Kanagawa prefectural as well as in Japan.

The **underlying driver** for the start of the cooperation activity between Kanagawa Prefecture and the Finnish entities was **Kanagawa Prefecture’s the Healthcare New Frontier (HCNF)**. The cooperation started through **pre-existing contacts** networks amongst academia as a result of the cooperation between the Yokohama National University and Oulu University from 2009 onwards. As the abovementioned healthcare policies of Kanagawa Prefecture were a **good match with the healthcare policies of Oulu city**, Kanagawa Prefecture and Oulu city were keen on cooperating with each other in the fields of life science and medical development. At the time, the City of Oulu had a strong presence in the **ICT, healthcare and medical sector and was aiming to internationalize**, a goal held in common with Kanagawa Prefecture. Through the established network channels several business missions by Business Oulu and Kanagawa delegations were organized, which resulted in the signing of a **MoU with a duration of five years and renewable on both parties’ consent in 2014**. Kanagawa sent Japanese business delegations to Oulu twice, in 2014 and in 2016, and Oulu business delegation came to Kanagawa once in 2017.

The **goal of the cooperation**, as stated in the MoU, is to **collaborate in scientific and technological developments as well as business activities** between public and private sector institutions such as universities, research centres, particularly through **business transactions and/or technology transfer** in eHealth and the biomedical industry. Moreover, the partners aim to create new opportunities for the collaboration in science, technology and innovation and to promote collaboration through cooperative actions and initiatives focused particularly in the following areas and sectors: 1) healthcare products, applications and services; 2) biomedical and pharmaceutical products, application and services; 3) innovation for creative social systems based on the ME-BYO and the OuluHealth Ecosystem concepts and; 4) robotics including applications and technologies such as AI for healthcare.

The activities within the cooperation scheme consist of **business networking and business missions** supported by funding from Oulu as well as collaboration in the forms of joint research projects and education. On the research project area, there is a **keen interest in collaboration in the area of cohort research** using the biobank of Oulu and cohort research data in Kanagawa between the two parties, involving Oulu University. Results of the cooperation so far as mentioned by Kanagawa Prefecture are good relationships with Oulu University. Through the master’s program, the school provides innovative education including public health, technology business, administration and practical training in health-related fields taught in both English and Japanese. This master program is the first of its kind in Japan, according to Kanagawa Prefecture.

**Challenges** as mentioned by Kanagawa Prefecture throughout the cooperation activities are the **lack of funding from the Japanese side** as well as the fact it is often **difficult to get results in business matching** as it takes a long time for the companies to develop their partnership. Furthermore, Kanagawa Prefecture mentioned that the **lack of know-how within Japanese SMEs** on how to expand their businesses overseas poses a challenge in their internationalization. Additionally, lots of Japanese companies on the Japanese side face a **language barrier** when they start overseas operations. These factors pose the major challenge when it comes to the internationalization of businesses in the
healthcare sector from Kanagawa, although they would be interested in internationalization, according to Kanagawa Prefecture.

In general, however, Kanagawa Prefecture has a very **positive** attitude towards the cooperation activities with the City of Oulu, as it has certain **benefits** for their public as well as private stakeholders. These benefits are the **opportunity to promote Kanagawa Prefecture’s healthcare policies** beyond borders through overseas collaboration. Furthermore, the cooperation scheme has **enhanced the business opportunities** from both Oulu City and Kanagawa Prefecture through business exchanges and market expansion in the field of healthcare and life science.
2.5 Underlying drivers, challenges and benefits for SMEs

The underlying drivers, challenges and benefits have been identified through survey responses from all types of stakeholders from the EU and from Japan as well as through the interviews. Information about underlying drivers for all types of cooperation has been identified through survey responses as well as through interviews. Information about challenges has been identified in the same way. Information about benefits for SMEs involved in cooperation as well as for the organizations involved has been identified through interviews.

2.5.1 Underlying drivers

EU

EU survey respondents mentioned many different types of underlying drivers. The majority of the EU survey respondents who are engaged in some cooperation with Japanese entities mentioned their wish to support their regional SMEs in their internationalization process, to let them collaborate with Japanese companies and to ease their market access to the Japanese market. Other underlying drivers mentioned by EU survey respondents are the aim to access the counterparts’ network, to complete supply chains, to exchange information, to enhance innovation in the region, and to enhance regional development.

EU interviewees also mentioned several underlying drivers to start cooperation with Japanese entities. It is interesting to note that most organizations of EU interviewees already had contacts in Japan, and some of them mentioned longstanding trustworthy relationships between Japan and their region/country/cluster as one of the underlying drivers to start cooperation (City State of Hamburg, Bicoll GmbH, Basque Energy Cluster, Power Electronics Cluster). Moreover, the aim to support their region’s SMEs in their internationalization process and to help them enter Japanese markets through cooperation with Japanese entities was often mentioned as an underlying driver (Basque Energy Cluster, Medicen Paris, State of Brandenburg). In some cases, interviewees mentioned that Japan has a well-developed industry in the field of the EU organization in question as an underlying driver (Bicoll GmbH, Power Electronics Cluster). Furthermore, the availability of funding on the national level through projects with Japan has been mentioned once as an underlying driver (Bicoll GmbH). A strong interest from the Japanese side was also mentioned once (Basque Energy Cluster).

Japan

Amongst the Japanese survey respondents, the most commonly mentioned underlying driver was the aim to support local/regional SMEs in their internationalization process and to let them collaborate with EU companies. Another underlying driver mentioned was the aim to enhance innovation in the respective prefecture.

Japanese interviewees also mentioned their aim to support SMEs in their area in their internationalization process and/or overseas business expansion as an underlying driver to start cooperation with European entities (Osaka prefecture, Kanagawa prefecture, Hokkaido University). In one case, this type of underlying driver was mentioned in combination with the fact that the country of the EU counterpart has a well-developed industry in question (Osaka prefecture). Other underlying drivers mentioned were the aim to enhance innovation in the area through cooperation with their EU counterpart (Kawasaki city, Sendai city), the existence of similar goals for the industry in question of both EU and Japanese counterparts involved (Sendai city, Kanagawa prefecture,
Kawasaki city), the aim to complete the supply chain (YU-FIC), the aim to access the network of the EU counterpart (Hokkaido University), the availability of funding for joint projects from the EU side (Kawasaki city) and a strong interest in cooperation from the EU counterpart (JCC, Sendai city).

2.5.2 Challenges

**EU**

Amongst the EU survey respondents, several types of challenges have been identified. However, the most commonly mentioned challenges can be categorized into 1) cultural barriers, 2) language barriers and 3) matters related to funding. Within the cultural barrier category, the amount of time needed to create a trustful relationship prior to starting any collaborative activities and the amount of time needed for negotiations to create a beneficial cooperation framework for both sides are most commonly mentioned challenges. In the language barrier category, all EU survey respondents facing this type of challenge mentioned the lack of English language mastery of their Japanese counterpart. In some cases, this type of challenge is solved by hiring an interpreter, but this is often costly. Within the funding category, the majority of EU survey respondents indicated that SMEs face difficulties in obtaining enough funding for frequent visits to Japan in order to find partners and to establish trustful relationships. As SMEs lack the amount of money needed for these activities, they have to depend on external funding sources. Furthermore, EU survey respondents also mentioned they face challenges in finding funding from both sides of the cooperation. In some cases, cooperation fully relies on funding from the EU side. Other challenges identified unrelated to the previously mentioned categories are a lack of contacts in Japan, difficulties in entering the Japanese market because of protectionism and a lack of know-how related to legislative matters.

A majority of the EU interviewees also mentioned they were facing challenging situations during cooperation with Japanese counterparts because of cultural differences (City State of Hamburg, Power Electronics Cluster, Medicen Paris, State of Brandenburg). Another challenge mentioned by multiple European interviewees was a language barrier between the cooperation counterparts on the regional level and/or the SMEs involved (City State of Hamburg, Basque Energy Cluster, State of Brandenburg). Other challenges mentioned by the interviewees are a lack of funding for SMEs in their internationalization process (City State of Hamburg, State of Brandenburg), difficulties in entering the Japanese markets due to protectionism for the industry in question (City State of Hamburg), conflicts in interests (City State of Hamburg, Bicoll GmbH, Power Electronics Cluster), doubts if the Japanese counterpart knows how to organize similar incentives as the European counterpart (Bicoll GmbH) and general communication problems not resulting from a language barrier or cultural differences (Medicen Paris).

**Japan**

Amongst Japanese survey respondents, the most commonly mentioned challenges were matters related to funding and the identification of good business partners for SMEs as well as for other entities such as research institutes and R&D centres. Here, difficulties in especially finding matching needs and seeds between the EU and the Japanese potential counterparts was perceived as a challenge. Another commonly mentioned challenge by the Japanese survey respondents was the language barrier between the EU and the Japanese cooperation counterparts.
The challenge mentioned by the majority of Japanese interviewees was the existence of a language barrier caused by the Japanese side of the cooperation (YU-FIC, Sendai city, Hokkaido University, Kanagawa prefecture). Furthermore, lack of funding from the Japanese side of the partnership and a lack of resources for the internationalization of SMEs was mentioned multiple times (YU-FIC, Kanagawa prefecture, Kawasaki city). Another challenge mentioned multiple times is the **lack of know-how on internationalization processes within Japanese SMEs and institutions** (JCC, Kanagawa prefecture). Furthermore, **competition that arises due to a high degree in similarity between EU and Japanese SMEs** has been mentioned multiple times (YU-FIC, JCC, Kanagawa prefecture). Other challenges mentioned by Japanese interviewees are the **lack of interest from SMEs in internationalization** (Kawasaki city, YU-FIC), the **possibility of mismatching** of Japanese and EU SMEs (Osaka prefecture), the amount of time needed to develop partnerships between Japanese and EU entities and SMEs (Kanagawa prefecture), **overtakings in management** (YU-FIC) and organizing **meeting opportunities** for the Japanese and European partners to meet on an ongoing basis (Osaka prefecture).

**2.5.3 Benefits for SMEs**  
EU interviewees often mentioned that cooperation with Japanese entities opens up many opportunities for their SMEs in terms of **internationalization** and **entering the Japanese markets** (City State of Hamburg, Medicien Paris, State of Brandenburg). The increased opportunities for Japanese SMEs for internationalization and **EU market access** was also often mentioned by Japanese interviewees (Osaka prefecture, Sendai city, Hokkaido university, Kanagawa prefecture). In one case, this benefit was connected to the **economic development** that has been taking place in the respective area (YU-FIC). Another benefit mentioned by both European Japanese interviewees was the **access** gained to the **network of their partners** (Kawasaki city, JCC, Medicien Paris, Hokkaido university). A benefit mentioned multiple times by organizations involved in R&D was the **development of products** ready for commercialization (YU-FIC, Hokkaido University). Organizations involved in R&D mentioned the **increased opportunities for creation of new joint R&D projects** as a benefit of their cooperation (JCC, Osaka prefecture, Sendai city). The **increase of innovation** in the respective area through cooperation between Japanese and EU SMEs was also mentioned as a benefit (City state of Hamburg). Furthermore, as mentioned by some Japanese interviewees, cooperation activities with European entities has **improved** their **recognition and position worldwide** (Kawasaki city, Hokkaido University, Kanagawa prefecture). Other mentioned benefits are the **acquisition of useful information and new insights** gained by SMEs through the exchange of information between the EU and the Japanese cooperation counterparts (Power Electronics Cluster), **increased exports of SMEs/companies involved** in the cooperation (Kawasaki city, JCC), **improved bilateral relations** between the partners (City State of Hamburg, Osaka prefecture), successful business matches (JCC, Sendai city) and the **development of global entrepreneurial mindsets and new ways of thinking** (Hokkaido University).
3. Recommendations
This chapter of the report will give the Centre an advice on how to improve its services to better support the needs of entities involved in EU-Japan region & cluster cooperation. First, it will discuss service demands by EU and Japanese survey respondents (3.1). Thereafter, it will discuss the services provided by the Centre and how to improve these services to better cater to the needs of EU and Japanese stakeholders (3.2).

3.1 Services demand as identified by the survey
3.1.1 Statements prior to analysis
Survey respondents were asked how they think the Centre can help to further EU-Japan region & cluster cooperation, hereafter referred to as the service question. Survey respondents were able to choose one or more standardized options provided by the survey. Moreover, the option to share other kinds of demands not provided by the standardized options was also provided by the survey. It should be noted that although the survey in Japanese for Japanese stakeholders was nearly identical to the survey in English for EU stakeholders, the standardized options provided for the service question were different.

In the English version, the standardized options provided were:

1. Providing training programmes to better understand the counterpart
2. Supplying logistical support and market information
3. Creating partnering opportunities by organizing events, an online platform, etc.

In the Japanese version, the standardized options provided were:

1. Promoting matching activities such as international cooperation and partnerships
2. Exchanging information with European partners
3. Promoting technology transfer/licensing services with European partners
4. Networking for member companies/institutions and
5. Organizing co-sponsored events such as seminars/conferences, symposia

For the sake of the analysis of this chapter, the standardized options provided by the Japanese version of the survey will be categorized into two of the three standardized options provided by the English version of the survey. The first, fourth and the fifth option in the Japanese version will be regarded as equal answers to the third option of the English version (creating partnering opportunities by organizing events, an online platform, etc.). The second and the third option of the Japanese version
will be regarded equal to the second option of the English version (supplying logistical support and market information). See figure 8.

![Diagram showing supply and service options](image_url)

*Figure 8: Categorization of Japanese standardized options into the English standardized options*

It should be noted that in the Japanese version of the survey, there hasn’t been provided a standardized option equal to the first option of the English version of the survey (providing training programmes to better understand the counterpart). The reason for this is that whereas it is generally perceived that Japan has one business culture, this does not apply for the EU. It can be concluded from several studies that national culture influences organizational culture and since within the EU differences in national cultures and thus business cultures exist, the same type of question cannot be asked in the Japanese version of the survey (Vignoles et al. 2018; Lindholm 2000; Thomas 2008; Robbins 2003; Buchanan and Huczynski 2004).

### 3.1.2 Service demand

In this section, the service demand by EU and Japanese survey respondents will be analyzed. First, general survey outcomes will be stated. Thereafter, differences in services demand by type of survey respondent and differences in services demand by survey respondents with cooperation with EU-Japan cooperation and survey respondents without EU-Japan cooperation will be analyzed.
General survey outcomes

A total of 37 EU survey respondents’ answers were collected and a total of 10 Japanese survey respondents’ answers were collected. In Table 2, the total number of service respondents, the total number of survey respondents who answered to the service question and the number of survey respondents who answered to the service question with and without cooperation with EU/Japanese entities are shown.

<table>
<thead>
<tr>
<th>Clusters</th>
<th>Total number stakeholders answered to survey</th>
<th>Total number stakeholders answered to service question</th>
<th>Stakeholders answered to service question w/o cooperation</th>
<th>Stakeholders answered to service question with cooperation</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU</td>
<td>28</td>
<td>13</td>
<td>1</td>
<td>12</td>
</tr>
<tr>
<td>Japan</td>
<td>8</td>
<td>5</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>Regions/prefectures</td>
<td>EU</td>
<td>24</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Japan</td>
<td>3</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Municipalities</td>
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<td>0</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>Japan</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Regional agencies</td>
<td>EU</td>
<td>29</td>
<td>12</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Japan</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Chambers of Commerce and Industry</td>
<td>EU</td>
<td>11</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>Japan</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>EU</td>
<td>92</td>
<td>37</td>
<td>13</td>
</tr>
<tr>
<td></td>
<td>Japan</td>
<td>14</td>
<td>10</td>
<td>10</td>
</tr>
</tbody>
</table>

Table 2: Survey respondents who answered to the service question

According to the English version as well as the Japanese version of the survey, the most requested type of support is the creation of partnering opportunities by organizing events, an online platform, etc. 85% of the EU survey respondents requested this type of service and 70% of the Japanese survey respondents requested this type of service. A majority of EU survey respondents, 70%, requested logistical support and market information supply services. This type of service was relatively less popular amongst the Japanese survey respondents. Only 30% of the Japanese survey respondents requested this type of service. A significant interest was expressed by EU survey respondents in the provision of training programmes to better understand the counterpart by the Centre. The percentage of European stakeholders interested in this type of service is 65%. To visualize this data, Figure 9 has been composed.
Differences in demands by type of survey respondent and by the existence of EU-Japan cooperation

To analyze if there are differences in 1) demand of services by type of survey respondent and 2) demand of services by survey respondents engaged in EU-Japan cooperation and survey respondents not engaged in EU-Japan cooperation, the data shown in Tables 3, 4 and 5 has been compiled. Table 3 shows the service demand by type of survey respondent. Table 4 shows the service demand by service respondents with EU-Japan cooperation. Table 5 shows the service demand by survey respondents without EU-Japan cooperation.
<table>
<thead>
<tr>
<th></th>
<th>to better understand the counterpart</th>
<th>market information</th>
<th>by organizing events, an online platform, etc.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Clusters</strong></td>
<td>EU 9</td>
<td>8</td>
<td>10 5</td>
</tr>
<tr>
<td></td>
<td>Japan -</td>
<td>1</td>
<td>4 0</td>
</tr>
<tr>
<td><strong>Regions/prefectures</strong></td>
<td>EU 6</td>
<td>6</td>
<td>7 2</td>
</tr>
<tr>
<td></td>
<td>Japan -</td>
<td>0</td>
<td>2 0</td>
</tr>
<tr>
<td><strong>Municipalities</strong></td>
<td>EU 0</td>
<td>0</td>
<td>0 0</td>
</tr>
<tr>
<td></td>
<td>Japan -</td>
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<td>1 0</td>
</tr>
<tr>
<td><strong>Regional agencies</strong></td>
<td>EU 6</td>
<td>10</td>
<td>7 4</td>
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<td></td>
<td>Japan -</td>
<td>0</td>
<td>2 0</td>
</tr>
<tr>
<td><strong>Chambers of Commerce and Industry</strong></td>
<td>EU 3</td>
<td>3</td>
<td>5 1</td>
</tr>
<tr>
<td></td>
<td>Japan -</td>
<td>0</td>
<td>0 0</td>
</tr>
</tbody>
</table>

Table 3: Service demand by type of survey respondent

<table>
<thead>
<tr>
<th>Survey respondents with EU-Japan cooperation</th>
<th>Providing training programmes to better understand the counterpart</th>
<th>Supplying logistical support and market information</th>
<th>Creating partnering opportunities by organizing events, an online platform, etc.</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Clusters</strong></td>
<td>EU 8</td>
<td>7</td>
<td>9 5</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Japan -</td>
<td>1</td>
<td>4 0</td>
<td></td>
</tr>
<tr>
<td><strong>Regions/prefectures</strong></td>
<td>EU 3</td>
<td>3</td>
<td>4 1</td>
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</tr>
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<td></td>
<td>Japan -</td>
<td>0</td>
<td>2 0</td>
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</tr>
<tr>
<td><strong>Municipalities</strong></td>
<td>EU 0</td>
<td>0</td>
<td>0 0</td>
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<td></td>
<td>Japan -</td>
<td>0</td>
<td>1 0</td>
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<tr>
<td><strong>Regional agencies</strong></td>
<td>EU 3</td>
<td>5</td>
<td>5 4</td>
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<td></td>
<td>Japan -</td>
<td>0</td>
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<tr>
<td><strong>Chamber of Commerce and Industry</strong></td>
<td>EU 1</td>
<td>1</td>
<td>2 1</td>
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<tr>
<td></td>
<td>Japan -</td>
<td>0</td>
<td>0 0</td>
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</tr>
</tbody>
</table>

Table 4: Service demand by organizations with EU-Japan cooperation

<table>
<thead>
<tr>
<th>Survey respondents without EU-Japan cooperation</th>
<th>Providing training programmes to better understand the counterpart</th>
<th>Supplying logistical support and market information</th>
<th>Creating partnering opportunities by organizing events, an online platform, etc.</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Clusters</strong></td>
<td>EU 1</td>
<td>1</td>
<td>1 0</td>
<td></td>
</tr>
</tbody>
</table>

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Clusters

EU clusters almost equally demanded every type of service provided by the survey. There is no clear link between the type of service demanded and the existence of EU-Japan cooperation. All types of services were demanded equally regardless if the cluster indicated to be in engaged in EU-Japan cooperation or not. Clusters who submitted their own ideas to the service question on how they think the Centre can help to further EU-Japan region & cluster cooperation, mentioned the following: creating funding for SMEs, lobbying in Japan to initiate funding programs for international cooperation projects in the biopharma sector, setting up new calls for cross-cluster-programmes and identifying potential partners for collaborations.

The majority of Japanese clusters demanded the creation of partnering opportunities by organizing events, an online platform, etc. Only one out of 5 Japanese clusters that answered to the service question indicated a demand for the supply in logistical support and market information from the EU-Japan Centre for Industrial Cooperation.

Regions/prefectures

Based on the answers given by EU regions, the same trend as the EU clusters discussed above could be identified. EU regions also demand for every type service given by the survey equally. Moreover, there is no clear link between the demand for a certain type of service and the existence of EU-Japan cooperation. Regions who chose to submit their own ideas on how they think the Centre can help to further EU-Japan region & cluster cooperation, mentioned the following: arranging factfinding or study trips led by DG or other EU-delegations, supplying information on the EU level and allowing EU representatives to participate in activities.

All Japanese prefectures demand the creation of partnering opportunities by organizing events, an online platform, etc. Demand for other services has not been identified. All prefectures that answered to the service question indicated that they are engaged in EU-Japan cooperation. Japanese prefectures who indicated that they are not engaged in EU-Japan cooperation have not answered to the services question. Therefore, a difference between the demand in services by Japanese prefectures with cooperation and without cooperation cannot be identified.
**Municipalities**
There are no EU survey respondents in this stakeholder category. Therefore, this section only discusses demands of Japanese municipalities. Only 1 Japanese municipality has answered to the services question. Therefore, no trends for municipalities can be identified.

The municipality indicated to be engaged in EU-Japan cooperation and indicated a demand for the creation of partnering opportunities by organizing events, an online platform, etc.

**Regional agencies**
EU regional agencies who answered to the service question mostly demanded the supply of logistical support and market information. The type of service demanded secondly was the creation of partnering opportunities by organizing events, an online platform, etc. and the provision of training programmes to better understand the counterpart was demanded the least. There is no clear link between the services demanded by EU regional agencies and the existence of EU-Japan cooperation.

Agencies that have added their own ideas on how they think the Centre can help to further EU-Japan region & cluster cooperation, mentioned the following: creating synergies with Japanese and European national/local organizations, implementing the EU-Japan Trade Agreement, creating a funding program for business development and providing financial support for projects. One regional agency mentioned that their expectations towards the EU-Japan Centre for supporting interregional cooperation are very low.

All Japanese regional agencies indicated a demand for the creation of partnering opportunities by organizing events, an online platform, etc. by the Centre. No other standardized options provided by the survey have been selected. No Japanese regional agencies who indicated to be engaged in EU-Japan cooperation have answered to the service question. Therefore, a link between the type of service demand and the existence of EU-Japan cooperation for Japanese regional agencies cannot be identified.

**Chambers of Commerce and Industry**
No Japanese chambers of commerce and industry have been contacted. Therefore, only the survey results of the European chambers of commerce and industry will be discussed in this section.

Chambers of commerce and industry answered to the service question in a similar way as the EU regions. There is a demand for all types of services provided by the survey. However, the creation of partnering opportunities by organizing events, an online platform, etc. by the Centre has been demanded most frequently. There is no clear link between the type of service demanded and the existence of EU-Japan cooperation. One chamber of commerce and industry has shared its own idea on how it thinks the Centre can help to further EU-Japan region & cluster cooperation, which was: informing about initiatives to meet with local governments and sharing their needs.

**3.1.3 Conclusions**
Based on the analysis above, the following statements can be made about differences in 1) services demand in general, 2) demand of services by type of survey respondent and 3) demand of services by
survey respondents engaged in EU-Japan cooperation and survey respondents not engaged in EU-Japan cooperation:

1. The most frequently requested type of support is the creation of partnering opportunities by organizing events, an online platform, etc. A majority of both EU and Japanese survey respondents requested this type of service. A majority of EU survey respondents requested logistical support and market information supply services. This type of service was relatively less popular amongst the Japanese survey respondents. A majority of EU survey respondents requested the provision of training programmes to better understand the counterpart.

2. There is a difference in demand of services by type of survey respondent on the EU side. EU clusters and regions almost equally demanded every type of service. EU regional agencies most frequently demanded the supply of logistical support and market information. EU chambers of commerce and industry most frequently demanded the creation of partnering opportunities by organizing events, an online platform, etc. All types Japanese survey respondents demanded the creation of partnering opportunities by organizing events, an online platform, etc. by the Centre most frequently. Therefore, there is no difference in the demand of services by type of survey respondent on the Japanese side.

3. There is no clear difference between the type of services demanded by survey respondents engaged in EU-Japan cooperation and survey respondents not engaged in EU-Japan cooperation. This is applicable to both the EU survey respondents and Japanese survey respondents.

3.3 Recommendations to the EU-Japan Centre for Industrial Cooperation

3.3.1 Providing training programmes to better understand the counterpart

Multiple EU survey respondents mentioned their demand for services that would allow them to better understand their Japanese counterparts. Additionally, multiple EU interviewees indicated that they face challenges related to cultural differences in their EU-Japan region & cluster cooperation.

Whereas training programmes cannot take away cultural differences, it could be argued that they create a better understanding of the Japanese counterparts and serve as a tool to adjust expectations related to for example decision-making processes of the Japanese counterparts.

Get Ready for Japan

Training programs to better understand the counterpart are being offered by the Centre for EU executives through the 2-week “Get ready for Japan” programme (https://www.eu-japan.eu/events/get-ready-for-japan-training-programme). This programme is designed to help participants to gain knowledge on how to do business in Japan. It is focused on business management and consists of a combination of lectures, case studies, role plays and company visits. This is designed to help participants become thoroughly informed about the actual conditions of Japanese business through practical analysis and research. Participants will have the opportunity to take part to negotiation role-play exercises and discuss with Japanese managers about decision-making, team management methods in Japan.
This service covers the need for training programmes to better understand the counterpart for EU executives. However, EU-Japan region & cluster cooperation does not only involve companies. Also, other types of stakeholders such as **cluster managers, heads of departments of regional governments and executives of regional agencies and chambers of commerce and industry** play an important role in EU-Japan region & cluster cooperation. Therefore, making the program accessible to these types of stakeholders would cater their demand for the provision of training programmes to better understand the counterpart. Japanese survey respondents were not provided the option to mention their need for a training programme to better understand the counterpart for the reason that there is no universal business culture in the EU. However, some Japanese interviewees mentioned their aim to better understand their counterpart through EU-Japan region & cluster cooperation such as Osaka prefecture. In this respect, offering similar **information about each EU/COSME countries’ societal values and business culture in EU country profiles** or links to relevant (external) information sources on a Japanese version of the EU-Japan Centre website or a Japanese version of the EU Business in Japan website may be helpful.

### 3.3.2 Supplying logistical support and market information

A majority of EU clusters, regions and regional agencies as well as a Japanese cluster mentioned their demand for logistical support and market information. Multiple EU and chambers of commerce and industry also mentioned their demand for this type of service.

Services with the aim to supply market/technology information and to provide logistical support are being offered by the EU-Japan Centre through 1) the EU Business in Japan webpage, 2) the EU-Japan Technology Transfer helpdesk, 3) the Japan Tax and Public Procurement Helpdesk, 4) the High Tech Cluster support webpage, 5) the EPA helpdesk and 6) the Step in Japan service.

**EU Business in Japan**

The EU Business in Japan portal ([https://www.eubusinessinjapan.eu/](https://www.eubusinessinjapan.eu/)) provides **practical information on Japan for EU businesses looking for clear guidelines to trade with or invest in Japan**, including sectoral information (market surveys), business issues (entry strategy, corporate taxation, legal and regulatory issues, IPR etc.) and cross-cultural issues (Japan-style communication, business negotiation, decision-making process etc.). This service is created in order to enable **EU companies** to find quickly the largest number of sources of information on doing business with Japan. There is no Japanese version of this service available. Reports on the Japanese market in addition to policy papers, case studies and success stories can also be found in the Library on the English webpage of the Centre ([https://www.eu-japan.eu/library](https://www.eu-japan.eu/library)). However, the majority of these reports are targeted at EU audiences and although the Library (出版物・レポート) is also available on the Japanese webpage of the Centre ([https://www.eu-japan.eu/ja/library](https://www.eu-japan.eu/ja/library)), it does not contain any reports on EU markets or case studies and success stories of Japanese companies.

Thus, the demand for market information of EU stakeholders is covered already by the services of the Centre, but the demand for market information of Japanese stakeholders is not. Therefore, composing a **Japanese version of the EU Business in Japan** portal and providing reports on EU markets targeted at Japanese audiences in need of market information could be considered.
**EU-Japan Technology Transfer Helpdesk**

The EU-Japan Technology Transfer helpdesk provides general content about intellectual property rights, technology transfer, and related topics between the EU and Japan aimed at EU and Japanese companies, universities, research centres and individuals ([http://www.eu-ja-thelhelpdesk.eu](http://www.eu-ja-thelhelpdesk.eu)). For EU and Japanese universities and research centres, the scope of services also includes the uploading of available and promising technologies to find potential licencees or partners (free of charge).

This service would be useful for especially EU and Japanese cluster members or clusters who are looking for partners for the furthering of the development of certain technologies.

**Japan Tax and Public Procurement Helpdesk**

The Japan Tax and Public Procurement Helpdesk is an online helpdesk-service and an extensive database of information on Japanese tax issues and public procurement set in order to lessen the obstacles faced by EU SMEs when entering the Japanese market ([https://www.eu-japan.eu/japan-tax-public-procurement-helpdesk](https://www.eu-japan.eu/japan-tax-public-procurement-helpdesk)). Services by the helpdesk include information inquiry services, PP Market Quick Scan, PP Supplier Qualification Application Support, Webinars, etc.

This service would cover any need for information in the areas of public procurement and tax issues on the EU side. However, a similar service to provide Japanese stakeholders with the same type of information is not available. This is something that could be considered to cater to the needs of Japanese stakeholders.

**High Tech Cluster Support**

For the benefit of EU and Japanese clusters, the Centre provides support in helping them identify potential cooperation partners in the reciprocal regions through facilitating access to information on EU and Japanese clusters in general, on existing cooperation set-ups between EU and Japanese clusters, and on financing tools that may be used to foster future cooperation ([https://www.eu-japan.eu/high-tech-cluster-support](https://www.eu-japan.eu/high-tech-cluster-support)).

This service however, is only available on the English webpage and provides information about the Japanese cluster landscape and about Japanese clusters. There is no similar information provided about the cluster landscape in the EU and EU clusters to inform Japanese clusters on such areas. As the majority of Japanese clusters demand such services, it could be considered to provide similar information about the EU cluster landscape and about EU clusters on the Japanese Industrial cluster help desk (産業クラスターヘルプデスク) website ([https://www.eu-japan.eu/ja/industrial-innovation-rd](https://www.eu-japan.eu/ja/industrial-innovation-rd)). For the EU cluster landscape, the overview provided in this report could serve as a base.

**EPA Helpdesk**

The EPA helpdesk of the Centre aims to raise awareness of the opportunities this agreement offers and to help EU SMEs take advantage of them ([https://www.eu-japan.eu/epa-helpdesk](https://www.eu-japan.eu/epa-helpdesk)). The helpdesk provides information about the changes brought by the EPA and recommendations on the potential benefits the EU-Japan EPA will offer EU SMEs. Additionally, the helpdesk will answer EPA-related
queries, organize webinars and publish information and practical guides covering a specific topic or sector.

This service also caters to the need for the supply of information to EU stakeholders. However, considering the fact that the EPA also opens up opportunities for Japanese stakeholders and there is a demand for the supply of information by Japanese stakeholders as well, providing a similar service to Japanese stakeholders by the Japanese version of the Centres website could be considered.

*Step in Japan*

The Centre provides logistical support through the Step in Japan service (*https://www.eu-japan.eu/logistical-support-step-japan*). The service, which is offered free of charge, acts as a landing pad for EU SMEs planning on entering into or expanding within Japan. The initiative encompasses a full range of essential support measures for businesses, such as free office space in Japan on the Centre’s premises that includes an internet connection and telephone for up to 1 month, full access to meeting and seminar facilities within the Centre’s premises, a help desk for all information inquiries on business in Japan and assistance with using the EEN services while in Japan.

This service covers the need for logistical support for EU stakeholders planning on entering into or expanding within Japan. However, there is no such service that would cater to the same needs of Japanese stakeholders. Therefore, providing a similar service in the EU for Japanese stakeholders planning on entering into or expanding within Europe could be considered, based on the extent of the demand from the Japanese side. This could take the form of deals between the EU-Japan Centre and shared office spaces in every European country, or the EU-Japan Centre’s office in Brussels.

*3.3.3 Creating partnering opportunities by organizing events, an online platform, etc.*

The most commonly demanded service by all types of both Japanese and EU survey respondents is the creation of partnering opportunities by organizing events, an online platform, etc. by the Centre.

The Centre already offers some services that cater to this type of demand. These services are 1) the missions to Japan for EU clusters and SMEs, 2) business and technological partnering support for European and Japanese stakeholders by the EEN and 3) the newly devised EU-Japan Regional Cooperation Helpdesk.

*Missions to Japan for EU Clusters & SMEs*

Through the yearly business missions to Japan for EU SMEs and clusters (in the Biotechnology, ECT and Nanotech industries), the Centre facilitates the first contact that could be the door leading to new business opportunities through market-specific business seminars, one-on-one meetings at a targeted trade fair and networking events (*https://www.eu-japan.eu/business-missions-japan*).

This service caters to the needs of stakeholders who are looking for partnering opportunities through events. However, as Japanese stakeholders also expressed their needs for especially this type of service, providing a similar service for Japanese clusters/regions and SMEs could be considered to cater to the needs of Japanese stakeholders.
Europe Enterprise Network (EEN)

The EEN helps SMEs make the most of business opportunities in the EU and beyond. The EEN provides advices and services to EU businesses, in the fields of international business cooperation, innovation, knowledge and technology transfer, financial sources and participation in EU-funded programmes. The Centre is a member of this network and represents Japan (EEN-Japan) with the support of METI (https://www.eu-japan.eu/business-technological-partnership-support-een) and so also provides support to Japanese businesses.

This service caters to the needs of both EU and Japanese stakeholders who are looking for partnering opportunities through matchmaking.

EU-Japan Regional Cooperation Helpdesk (EJRC Helpdesk)

The new EU-Japan Regional Cooperation Helpdesk (EJRC Helpdesk) is a service offered through the website of the Centre (https://www.eu-japan.eu/eu-japan-regional-cooperation-helpdesk). The EJRC Helpdesk (https://www.ejrc-helpdesk.eu/) was launched late 2019 and is a new regional cooperation platform mobilising EU regions and clusters, Japanese Prefectures and clusters, and aims to fully exploit the EU-Japan Economic Partnership Agreement (EPA) and the EU-Japan Partnership on Sustainable Connectivity. The helpdesk will provide appropriate information, including existing tools, funding, instruments, and will support regions, prefectures and clusters to find EU and Japanese partners to establish new cooperation and to reinforce existing ones. It will promote cooperation in terms of industry, trade, investment, innovation, tourism and people’s mobility. Such cooperation will be bilateral between EU and Japanese stakeholders, but it may also include EU-Japan cooperation in third countries, e.g. in Africa, South East Asia, EU’s neighbouring countries, Latin America. Furthermore, the service will be able to connect European and Japanese stakeholders to initiatives that already support regional and business cooperation such as the European Cluster Collaboration Platform, the JETRO Regional Industry Tie-up Program, the Enterprise Europe Network, Horizon 2020, and European Regional Networks. The three offices of the helpdesk are located in Strasbourg (office in the EU) and in the Gifu and Iwate prefectures (offices in Japan).

This service covers the need for the creation partnering opportunities by providing an online platform for both EU and Japanese stakeholders.

3.3.4 Other demands

Interesting to note is that survey respondents who shared their own ideas on how they think the Centre can help to further EU-Japan region & cluster cooperation often mentioned matters related to funding. Moreover, interviewees frequently mentioned a lack of funding as a challenge faced during their EU-Japan region & cluster cooperation. This suggests that there is a lack of funding and/or information about funding opportunities for EU-Japan region & cluster cooperation.

Therefore, the access to information about funding opportunities mentioned on the High-Tech cluster support webpage and through the EEN is of great importance for both EU and Japanese stakeholders, as these services could cover the need for information about funding opportunities for EU-Japan region & cluster cooperation. In this sense, constructing a separate webpage or even a new
helpdesk with the aim to inform EU and Japanese stakeholders about funding opportunities for their cooperation could be considered.
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ANNEXES
A. Surveys
English version

Survey about EU-Japan Interregional Cooperation

By the EU-Japan Centre of Industrial Cooperation

*Required

Explanation of the project

In order to support existing region-to-region cooperation to further EU-Japan industrial cooperation for SMEs, the research will aim to investigate the benefits for SMEs participating in EU-Japan inter-regional cooperation projects. Hereby, the focus will be on cooperation in the field of entities within industrial clusters (Region-to-Region/Cluster-to-Cluster/Region-to-Cluster). The reason for this focus is that collaborations in research and innovation networks are a tool to enhance the quality of research output in both EU and Japan regions, thus enhancing the global competitiveness of both the EU and Japan by developing solutions for industries and societal issues. However, other forms of industrial cooperation are also welcome to be mentioned in order to create a better understanding of the current situation. The research will provide a report with insights into the practices, successes, and challenges of existing EU-Japan inter-regional industrial, research and innovation collaborations and practical advice on ways to improve these collaborations, amongst other useful information about EU-Japan interregional cooperation.

The purpose of this survey is to create a better understanding of the current situation of EU-Japan interregional cooperation projects.

Confidential information will not be published in the final report unless given permission by your organization.

Survey start

(Section 1)

1. Name of organization *

2. Contact name *

3. Country *
5. Contact telephone number *

6. Does your organization have any ongoing cooperation projects with Japanese industrial clusters and/or prefectures/regions? *

*Mark only one oval.*

- Yes (please go to section 2)
- No (please go to section 3)

(Section 2: your organization currently has cooperation projects with Japan)

7. What kind of cooperation is your organization involved with (please list up all projects)?

8. Please name the Japanese counterpart(s).

9. What was/were the underlying driver(s) that started the cooperation project(s)?

10. Are there any challenges faced by your organization during the cooperation project(s)?

11. How do you think the EU-Japan Centre for Industrial Cooperation can help to further EU-Japan interregional cooperation?

*Tick all that apply.*

- Providing training programmes to better understand the counterpart
- Supplying logistical support and market information
- Creating partnering opportunities by organizing events, an online platform, etc.
- Other: ...

12. Are there any success stories your organization would like to share with our Centre?

*Mark only one oval.*

- Yes (please answer the questions below)
- No
13. If yes, please provide the information about the success story you would like to share with us below.

14. Could you supply the contact information of the involved stakeholders (both European and Japanese), so we can conduct another survey and/or an interview about successes and challenges from the stakeholders' point of view?

(Section 3: your organization has no cooperation projects with Japan (yet))

15. Were there any cooperation projects in the past?

*Mark only one oval.*

- Yes (please go to section 4)
- No (please continue with this section)

16. Would your organization be interested in cooperating with Japanese regions/prefectures/clusters?

*Mark only one oval.*

- Yes
- No

17. If yes, what kind of cooperation would your organization aim for? With what Japanese cluster/prefecture/region (if known)?

18. If no, why not?

(Section 4: your organization had cooperation projects with Japan in the past)

19. What kind of cooperation project was your organization involved in? With what Japanese cluster/region/prefecture?

20. What was/were the underlying driver(s) to start the cooperation project(s)?

21. Were there any challenges faced by your organization during the cooperation project(s)?
22. Why did the activity stop?

Survey end

We thank you for your time to reply to our survey

Please tick "yes" in the following question if you wish to receive a copy of the executive summary of the report (once it's completed)

23. Do you wish to receive a copy of the executive summary of the report (once it's completed)?

Mark only one oval.

- Yes
- No
日欧産業協力センター 日欧協力に関するアンケート

日本組織向け

研究の説明・アンケートの目的

この研究では、現在締結されている日欧地域間協力の発展を促すことで、中小企業の産業協力を活発化させることです。そのために、このアンケートでは日欧地域間協力プロジェクトに携わっている中小企業の利点について調査します。その中では、産業クラスター間協力に携わっている団体に重点を置いております。なぜなら、このような研究とイノベーションネットワークの協力は、EUと日本の地域の研究開発の質を高める方法の一つと考えられるからです。また、産業・社会問題へのソリューションを生み出すとともに、EU・日本のグローバル経済競争力を強化することにも繋がります。

アンケートでは、産業クラスター間協力だけに関わらず、様々な他の地域間協力の形式についてもお答えいただけますと幸いです。この研究レポートでは以下のことについてまとめました。

① 産業、研究またはイノベーションに関する日欧地域間協力の慣行または効果と課題
② このような日欧地域間協力の改善すべき点、また、改善方法

このアンケートの目的は現在のEUと日本の地域間協力プロジェクトの状況をよりよく理解することです。

組織から許可を得ない限り、機密情報は最終レポートに公開されません。

Survey start

1. 組織名

2. ご担当者名

3. 連絡先：メールアドレス

4. 連絡先：電話番号
5. 日欧地域間協力をすでに行なっていますか？

枠円形を1つだけマークしてください。

○ はい（セクション2へ進んでください）
○ いいえ（セクション3へ進んでください）

（セクション2：EUの産業クラスター・地域と協力されている組織向けのセクション）

6. どのような活動を行なっていますか？できるだけ具体的にお聞かせください

7. 相手先の組織の名称

8. 日欧協力に踏み出したきっかけは何でしたか

9. 協力プロジェクト中に組織が直面する課題がありましたか？

10. 日欧産業協力センターはEUと日本の地域間協力をどのように支援できると思いますか？

複数回答可

○ 国際協力とパートナーシップなどのマッチングの推進
○ ヨーロッパの協定先との情報の交換
○ ヨーロッパの協定先との技術移転/ライセンスサービスの推進メンバー企業/機関のためのネットワーキング
○ 共催イベントの企画（セミナー、会議、シンポジウム）
○ その他:

11. 日欧地域・産業協力センターと共有したいサクセストーリーはありますか？

枠円形を1つだけマークしてください。

○ はい
○ いいえ
12. 「はい」とご回答くださった方にお伺いいたします。以下に思い描いているサクセスストーリーをお聞かせください。

13. 相手先の連絡先

（セクション3：EUの産業クラスター・地域と協力されていない組織向けのセクション）

14. 過去にEU産業クラスター間協力などの協力関係を結んだことはありましたか？

棒円形を1つだけマークしてください。
○ はい（セクション4へ進んでください）
○ いいえ

15. EUの産業クラスター・地域との協力関係を希望していますか？

棒円形を1つだけマークしてください。
○ はい
○ いいえ

16. 「はい」とご回答くださった方にお伺いいたします。以下にどのような協力を希望していらっしゃいますか？また、どのような産業クラスターや地域との協力を希望していますか？

17. 「いいえ」とご回答くださった方にお伺いいたします。以下に協力が希望していない理由をお聞かせ下さい。

（セクション4：過去にEUの産業クラスター・地域と協力されたことがある組織向けのセクション）

18. どのような協力をされていましたか？できるだけ具体的にお聞かせください。
19. 日欧協力に踏み出したきっかけは何でしたか

20. 協力プロジェクト中に組織が直面した課題はありましたか？

21. なぜ EU との協力活動が中止になりましたか？

Survey end

アンケートにご返信いただきありがとうございます

22. レポートのエグゼクティブサマリーのコピーを希望していますか？
択円形を1つだけマークしてください。

○ はい
○ いいえ
B. Survey respondents

**EU**

**Clusters**

<table>
<thead>
<tr>
<th>Organization name</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Techtera</td>
<td>France</td>
</tr>
<tr>
<td>BioM Biotech Cluster Development GmbH</td>
<td>Germany</td>
</tr>
<tr>
<td>SCS Cluster</td>
<td>France</td>
</tr>
<tr>
<td>Basque Energy Cluster</td>
<td>Spain</td>
</tr>
<tr>
<td>Silicon Saxony</td>
<td>Germany</td>
</tr>
<tr>
<td>FEMAC</td>
<td>Spain</td>
</tr>
<tr>
<td>BioTech Hungary</td>
<td>Hungary</td>
</tr>
<tr>
<td>Plast Center Denmark</td>
<td>Denmark</td>
</tr>
<tr>
<td>Next Technology Technotessile</td>
<td>Italy</td>
</tr>
<tr>
<td>Aerospace Valley</td>
<td>France</td>
</tr>
<tr>
<td>Cluster Inteligentna Energija</td>
<td>Croatia</td>
</tr>
<tr>
<td>Medicen Paris Region</td>
<td>France</td>
</tr>
<tr>
<td>Organic Electronics Saxony</td>
<td>Germany</td>
</tr>
<tr>
<td>Chemie-Cluster Bayern GmbH</td>
<td>Germany</td>
</tr>
<tr>
<td>Foodvalley NL</td>
<td>The Netherlands</td>
</tr>
<tr>
<td>Transylvania Energy Cluster</td>
<td>Romania</td>
</tr>
<tr>
<td>Cluj IT Cluster</td>
<td>Romania</td>
</tr>
<tr>
<td>Transilvania IT Cluster</td>
<td>Romania</td>
</tr>
<tr>
<td>Astrico Nord-Est Textile Cluster</td>
<td>Romania</td>
</tr>
<tr>
<td>Agrofood Regional Innovative Cluster</td>
<td>Romania</td>
</tr>
<tr>
<td>Power Electronics Cluster (ECPE e.V.)</td>
<td>Germany</td>
</tr>
<tr>
<td>North-East Innovative Regional Cluster for Structural and Molecular Imaging</td>
<td>Romania</td>
</tr>
<tr>
<td>Electronic INovation Cluste</td>
<td>Sweden</td>
</tr>
<tr>
<td>RISE Processum AB</td>
<td>Sweden</td>
</tr>
<tr>
<td>Functional Print Cluster</td>
<td>Spain</td>
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**Regional governments**

<table>
<thead>
<tr>
<th>Organization name</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Region of Peloponense</td>
<td>Italy</td>
</tr>
<tr>
<td>Managing Authority Region of Western Greece (State) Ministry for Economy, Transport and Innovation, Hamburg</td>
<td>Greece</td>
</tr>
<tr>
<td>Regional management Burgenland GmbH</td>
<td>Germany</td>
</tr>
<tr>
<td>Marshal’s office of the Mazowieckie Region</td>
<td>Poland</td>
</tr>
<tr>
<td>Marshal’s Office of the Westpomeranian Region</td>
<td>Poland</td>
</tr>
<tr>
<td>Regional Council of Kymenlaakso</td>
<td>Finland</td>
</tr>
<tr>
<td>Regional Council of Helsinki-Uusimaa</td>
<td>Finland</td>
</tr>
<tr>
<td>Agenzia Lavoro &amp; Sviluppolimpresa</td>
<td>Italy</td>
</tr>
<tr>
<td>The South Bohemian Regional Authority</td>
<td>Czech Republic</td>
</tr>
<tr>
<td>Regional Council of South Ostrobothnia</td>
<td>Finland</td>
</tr>
<tr>
<td>Municipality</td>
<td>Country</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Zemgale Planning Region</td>
<td>Latvia</td>
</tr>
<tr>
<td>Province of Zuid-Holland</td>
<td>The Netherlands</td>
</tr>
<tr>
<td>Province of Zeeland</td>
<td>The Netherlands</td>
</tr>
<tr>
<td>South Muntenia Regional Council</td>
<td>Romania</td>
</tr>
<tr>
<td>Marshal Office of the Świetokrzyskie Region</td>
<td>Poland</td>
</tr>
<tr>
<td>Regional Council of Satakunta</td>
<td>Finland</td>
</tr>
<tr>
<td>Self-governing Trnava Region</td>
<td>Slovak Republic</td>
</tr>
<tr>
<td>Marshal Office of the Wielkopolska Region</td>
<td>Poland</td>
</tr>
<tr>
<td>Region Nordjylland</td>
<td>Denmark</td>
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</tbody>
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**Agencies**

<table>
<thead>
<tr>
<th>Organization name</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASM Market Research and Analysis Centre Ltd.</td>
<td>Poland</td>
</tr>
<tr>
<td>Office for European Integration</td>
<td>Italy</td>
</tr>
<tr>
<td>Danish Business Authority</td>
<td>Denmark</td>
</tr>
<tr>
<td>Japan Office of the Economic Development Agency of the German State of North-Rhine Westphalia,</td>
<td>Germany</td>
</tr>
<tr>
<td>Wirtschaft Burgenland GmbH</td>
<td>Austria</td>
</tr>
<tr>
<td>Business Upper Austria - OÖ Wirtschaftsagentur GmbH</td>
<td>Austria</td>
</tr>
<tr>
<td>Regional Development Agency with Business Support Centre for Small and Medium-sized Enterprises</td>
<td>Bulgaria</td>
</tr>
<tr>
<td>Karlovy Vary Agency for Business Development, p.o.</td>
<td>Czech Republic</td>
</tr>
<tr>
<td>The Regional Development Agency of the Pardubice Region</td>
<td>Czech Republic</td>
</tr>
<tr>
<td>International Center for Entrepreneurship</td>
<td>Poland</td>
</tr>
<tr>
<td>Business Finland</td>
<td>Finland</td>
</tr>
<tr>
<td>Digital, Internet, Materials &amp; Engineering Co-Creation (DIMECC)</td>
<td>Finland</td>
</tr>
<tr>
<td>Business Support Centre for Small and Medium Enterprises-Ruse</td>
<td>Bulgaria</td>
</tr>
<tr>
<td>ITG Salzburg</td>
<td>Austria</td>
</tr>
<tr>
<td>Business Innovation Centre Plzen</td>
<td>Czech Republic</td>
</tr>
<tr>
<td>hub.brussels - Brussels Agency for Business Support</td>
<td>Belgium</td>
</tr>
<tr>
<td>BusinessOulu</td>
<td>Finland</td>
</tr>
<tr>
<td>ICS Internationalisation Center Styria</td>
<td>Austria</td>
</tr>
<tr>
<td>Innovation Hub Trentino</td>
<td>Italy</td>
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</tbody>
</table>

99
<table>
<thead>
<tr>
<th>Organization name</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brandenburg Economic Development Agency (WFBB)</td>
<td>Germany</td>
</tr>
<tr>
<td>Latgale entrepreneurship center</td>
<td>Latvia</td>
</tr>
<tr>
<td>LUXINNOVATION</td>
<td>Luxembourg</td>
</tr>
<tr>
<td>Regional Development Agency of West Region Romania</td>
<td>Romania</td>
</tr>
<tr>
<td>IUC Dalarna AB</td>
<td>Sweden</td>
</tr>
<tr>
<td>North-East Regional Development Agency</td>
<td>Romania</td>
</tr>
<tr>
<td>Toruń Regional Development Agency</td>
<td>Poland</td>
</tr>
<tr>
<td>Limburg Development and Investment Company</td>
<td>The Netherlands</td>
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</tbody>
</table>

**Chambers of Commerce and Industry**

<table>
<thead>
<tr>
<th>Organization name</th>
<th>Country</th>
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</thead>
<tbody>
<tr>
<td>Chamber of commerce and industry Vratsa</td>
<td>Bulgaria</td>
</tr>
<tr>
<td>Czech Chamber of Commerce and Industry in Japan (CCCJ)</td>
<td>Czech Republic</td>
</tr>
<tr>
<td>Burgas Chamber of Commerce and Industry</td>
<td>Bulgaria</td>
</tr>
<tr>
<td>The South Bohemian Chamber of Commerce</td>
<td>Czech Republic</td>
</tr>
<tr>
<td>Cyprus Chamber of Commerce and Industry</td>
<td>Cyprus</td>
</tr>
<tr>
<td>Finnish Chamber of Commerce in Japan</td>
<td>Finland</td>
</tr>
<tr>
<td>Hungarian Chamber of Commerce and Industry</td>
<td>Hungary</td>
</tr>
<tr>
<td>Aosta Valley Chamber of Enterprises and Professions</td>
<td>Italy</td>
</tr>
<tr>
<td>Chamber of Commerce and Industry of Hajdú-Bihar County</td>
<td>Hungary</td>
</tr>
<tr>
<td>Heves County Chamber of Commerce and Industry</td>
<td>Hungary</td>
</tr>
<tr>
<td>Italian Chamber of Commerce in Japan</td>
<td>Italy</td>
</tr>
</tbody>
</table>

**Japan**

**Clusters**

Sapporo City IoT Innovation Promotion Consortium

IT Consortium  Kyoto

Link-J

Japan Cosmetic Centre

Smart City institute Japan

Foundation for Biomedical Research and Innovation at Kobe

Hokkaido Bio Frontier
Regional governments
Kyoto Prefectural Cultural Science Research City Promotion Division
Fukuoka Prefecture Tokyo Office
Life Science Industry Division, Growth Industry Promotion Office, Department of Commerce and Industry, Osaka Prefecture

Municipalities
Kawasaki city

Agencies
Yokohama Business Management Foundation
Hokkaido EU Association

Chambers of Commerce and Industry
-
C. Contacted stakeholders per country

EU

Austria

1. Federation of Industrialists (IV)
2. Regional Government of Vrarlberg, General Economic Affairs Department
3. Wirtschafts-Standort Vorarlberg GmbH (WISTO)
4. Regional Government of Tirol, Department of Economics and Science
5. Locational Agency Tyrol
6. Transfer Office "Science – Business – Society" of Leopold-Franzens-University Innsbruck
7. Regional Government of Salzburg, Economic and research promotion Division
8. ITG Innovation Service Salzburg
9. Regional Government of Upper Austria, Department of Economy and Research
10. Business Upper Austria
11. Regional Government of Lower Austria, Department of International and European Affairs
12. Regional Government of Vienna, Federal Ministry for Digital and Economic Affairs
13. Regional Government of Styria, Department of Economy, Tourism, Sport
14. Styrian Business Promotion Agency
15. Central Staff Committee of the Office of the Carinthian Government
16. BABEG Carinthian Agency for Investment Promotion and Public Shareholding
17. Regional Management Burgenland Ltd, Management and secretariat
18. Burgenland Business Agency

Belgium

1. Department of Economy, Science and Innovation of the Flemish Government (EWI)
2. Flanders Investment & Trade
3. Flemish Research Council (FWO)
4. Digital Wallonia
5. Regional Government of Walonia, Directorate General for Economy, Employment and Research (DGO6)
6. The Scientific Liaison Agents (ALS) of The Walloon Export and Foreign Investment Agency (AWEX)
7. impulse.brussels
8. The Brussels Institute for Research and Innovation (INNOVIRIS)
9. Brussels-Capital Regional Government

Bulgaria

1. Bulgarian Chamber of Commerce
2. Chamber of commerce and industry Vratsa
3. Agency for regional and economic development – Vratsa
4. Regional partnerships for sustainable development - Vidin
5. Business Support Center for SME - Ruse
6. Regional Energy Agency - Ruse
7. Chamber of Commerce and Industry - Dobrich
8. Marine Cluster Bulgaria
9. Bulgarian business Association
10. Regional Administration Varna
11. Regional Agency for Entrepreneurship and Innovations – Varna (RAPIV)
12. Varna Economic Development Agency
13. Burgas Chamber of Commerce and Industry
14. ICT Cluster - Burgas
15. Institute for Agriculture - Karnobat
16. Stara Zagora Regional Economic Development Agency
17. Yambol Chamber of Commerce and Industry
18. Cleantech Bulgaria Foundation
19. Sofia Tech Park
20. Association of Entrepreneurs Gotse Delchev region
21. Business Information and Consulting Centre – Sandanski
22. Regional administration of Sofia region
23. Sofia Development Association
24. Pazardzhik Regional Administration
25. Plovdiv Chamber of Commerce and Industry
26. Plovdiv District Administration
27. Regional Development Agency with Business Support Centre for SMEs - Plovdiv
28. Regional Municipalities Association "Maritza"
29. Sliven District Administration
30. Srednogorie Industrial Cluster

**Czech Republic**

1. Czech Chamber of Commerce
2. Technology agency of the Czech Republic
3. Technology Centre AV ČR
4. Czech Chamber of Commerce in Japan
5. Central Bohemia Regional Chamber of Commerce
6. STAR Cluster
7. Regional Representation of the Confederation of Industry of the Czech Republic
8. Karlovy Vary Regional Authority
9. Ústí nad Labem Regional Authority
10. Business Development Agency of Karlovy Vary Region
11. Centre for Investment, Development and Innovation
12. Pardubice Regional Authority
13. Regional Development Agency
14. Regional Development Agency of the Pardubice Region
15. Olomouc Regional Authority
16. Regional Agency for the Development of Central Moravia
17. Regional Development Agency of the East Moravia Region
18. Moravia-Silesia Regional Authority
19. Moravian-Silesian Investment and Development
20. South Moravian Innovation Centre
21. South Moravian Regional Chamber of Commerce
22. Business Innovation Centre Plzen (BIC Plzen)
23. Plzeň Regional Authority
24. Regional Development Agency of the Pilsen Region
25. South Bohemia Regional Authority
26. South Bohemian Chamber of Commerce

Croatia

1. Croatian Chamber of Commerce
2. Ministry of Foreign and European Affairs, DIRECTORATE FOR ECONOMIC AFFAIRS AND DEVELOPMENT COOPERATION

Cyprus

1. Cyprus Chambers of Commerce

Denmark

2. Growth House Northern Jutland
3. House of Energy
4. Life Science Innovation North Denmark
5. North Denmark Region Government
6. Agro Business Park A/S
7. Business Development Centre Central Denmark
8. CenSec
9. Central Denmark Region Government
10. Danish Technological Institute
11. Business Development Centre - Southern Denmark
12. Energy Innovation Cluster
13. Plastic Centre Denmark
14. Region of Southern Denmark Government
15. Welfare Tech
16. Capital Region of Denmark Government
17. Copenhagen Fintech Innovation and Research
18. Region Zealand Government
19. Danish Chamber of Commerce in Japan

Finland

1. BusinessKuopio
2. BusinessOulu Ltd
3. The Centres for Economic Development, Transport and the Environment
4. Business Finland in Japan
5. Enterprise Finland
6. Council of Oulu Region
7. Innovation and technology center Miksei Ltd
8. Regional Council of Lapland
9. Business Tampere
10. Council of Tampere region
11. Regional Council of Central Finland
12. Regional Council of Ostrobothnia
13. West Finlad European Office
14. Regional Council of Satakunta
15. Regional Council of South Ostrobothnia
16. Regional Council of Southwest Finland
17. Regional Council of Hämé
18. Regional Council of Kymenlaakso
19. Regional Council of Päijät-Hämé
20. Regional Council of South Karelia
21. DIMECC - Digital, Internet, Materials & Engineering Co-Creation
22. Helsinki-Uusimaa Regional Council
23. Finnish Chamber of Commerce in Japan – FCCJ

France

1. French Chamber of Commerce in Japan
2. BUSINESS FRANCE
3. Invest in Paris Region
4. Ministry of Education, Research and Innovation
5. Regional Council of Ile-de-France
6. Dev’Up Centre-Val de Loire - Innovation and deconomic development agency
7. Regional Council - Centre-Val de Loire
8. Regional Council - Bourgogne Franche-Comté
9. Chamber of Commerce and Industry (CCI) Normandie
10. Regional Council Normandie
11. Regional Chamber of Commerce and Industry Hauts-de-France
12. Hauts-de-France Regional Council
13. Hauts-de-France Innovation Development (HDFID)
14. Grand Innove - Innovation Agency
15. Regional Council of Grand-Est
16. Tetchtera
17. Pôle SCS
18. Aerospace Valley
19. Innovation Agency - Pays de la Loire
20. Chamber of Commerce of Pays de la Loire
21. Regional Council - Pays de la Loire
22. Bretagne Development Innovation
23. Bretagne Commerce International
24. Regional Chamber of Commerce and Industry Bretagne
25. Regional Council Bretagne - Innovation and Economic Strategies division
26. Regional Council Nouvelle-Aquitaine
27. Regional development and innovation agency - Nouvelle-Aquitaine
28. Regional Chamber of Commerce and Industry Nouvelle-Aquitaine
29. Regional Agency for economic development, exportation and innovation
30. Regional Chamber of Commerce and Industry Occitanie
31. Regional Council Occitanie
32. Auvergne Rhônes-Alpes enterprises
33. Regional Agency for Innovation and Businesses’ internationalisation (ARII PACA)
34. Regional Chamber of Commerce and Industry Provence-Alpes-Côte d’Azur
35. South Region Council
36. CapEnergies Competitiveness Cluster
37. Corsica Economic Development Agency (ADEC)

Germany

1. BioM Biotech Cluster Development GMBH
2. NRW Japan K.K.
3. Ministry for Economy, Transport and Innovation, Hamburg
4. Silicon Saxony
5. OES Organic Electronics Saxony
6. Baden-Württemberg Foundation GmbH
7. State Ministry of Baden-Wuerttemberg for Economic Affairs, Labour and Housing Construction (regional office in Japan)
8. State Ministry of Baden-Wuerttemberg for Sciences, Research and Arts
9. Baden-Württemberg International
10. Bavarian Research Foundation
11. Bavarian State Ministry for Economic Affairs and Media, Energy and Technology
12. Senate Administration of Economic Affairs, Energy and Public Enterprises of Berlin
13. Senate Chancellery for Science and Research of Berlin
14. Brandenburg Invest WFBB
15. Ministry for Economic Affairs and Energy of the State of Brandenburg
17. The Bremen Chamber of Commerce
18. WFB Bremen Economic Development Ltd.
19. Hessen Trade & Invest Ltd. (GmbH)
20. Hessian State Ministry of Economy, Energy, Transport and Housing
21. Ministry for Economic Affairs, Labour and Health of Mecklenburg-West Pomerania
22. Lower Saxon State Chancellery
23. Ministry for Economic Affairs, Labour, Transport and Digitalisation of Lower Saxony
24. Ministry of Economic Affairs, Innovation, Digitalisation and Energy
25. IMG Innovation Management – GmbH
26. Ministry for Economic Affairs, Traffic, Regional Planning and viniculture
27. saaris saarland.innovation&location
28. State Ministry of Saarland for Economic Affairs, Labour, Energy and Traffic of Saarland
29. State Ministry of Economic Affairs, Labour and Transport
30. Ministry of Economic Affairs, Science and Digitalisation of Saxony-Anhalt
31. Business Development and Technology Transfer Corporation of Schleswig-Holstein GmbH
32. Thuringian ClusterManagement
33. Foundation for Technology, Innovation and Research Thuringia (STIFT)
34. Thuringian Ministry for Economic Affairs, Science and Digital Society
Greece

1. Regional Council of Attica
2. BIC of Attika
3. Regional Council of Eastern Macedonia and Thrace!
4. Enterprise Greece
5. Regional Council the North Aegean
6. Regional Council of Western Greece
7. Regional Council of Western Macedonia
8. Regional Council of Epirus
9. Regional Council of Thessaly
10. Regional Council of the Ionian Island
11. Regional Council of Central Macedonia
12. Regional Council of Crete
13. Regional Council of South Aegean
14. Regional Council of Central Greece
15. Greek Chamber of Commerce in Japan

Hungary

1. Hungarian Chamber of Commerce
2. Chamber of Commerce and Industry of Bács-Kiskun County
3. Chamber of Commerce and Industry of Békés County
4. Chamber of Commerce and Industry of Borsod–Abauj-Zemplen County
5. Csongrád County Chamber of Commerce and Industry
6. Chamber of Commerce and Industry of Fejér County
7. Chamber of Commerce and Industry of Győr-Moson-Sopron County
8. Chamber of Commerce and Industry of Hajdú-Bihar County
9. Heves County Chamber of Commerce and Industry
10. Chamber of Commerce and Industry of Jász-Nagykun-Szolnok County
11. Chamber of Commerce and Industry of Komárom-Esztergom County
12. Chamber of Commerce and Industry of Nógrád County
13. Pécs-Baranya Chamber of Commerce and Industry
14. Somogy Chamber of Commerce and Industry
15. Chamber of Commerce and Industry of Szabolcs-Szatmár-Bereg County
16. "Tolna County Chamber of Commerce and Industry
17. 7100 Szekszárd, Arany J. u. 23-25."
18. Vas County Chamber of Commerce and Industry
19. Veszprém County Chamber of Commerce and Industry
20. Zala County Chamber of Commerce and Industry
21. HIPA / Hungarian Investment Promotion Agency
22. Ministry of Foreign Affairs and Trade

Ireland

1. Ireland Japan Chamber of Commerce
2. Enterprise Ireland
3. Industrial Development Authority Ireland (IDA) Japan office
Italy

1. Italian Chamber of Commerce in Japan
2. Piedmont Regional Government
3. Piemonte Agency for Investments, Export and Tourism
4. Aosta Valley Regional Government
5. Regional Chamber of Commerce od Aosta
6. Liguria Regional Government
7. Department for Economic Development - Liguria
8. Italian Institute of Technology (IIT)
9. Liguria Research
10. SIIT - Sistemi Intelligenti Integrati Tecnologie
11. Bioindustry Park Silvano Fumer S.p.A
12. FinLombardia
13. Foundation Cluster Technologies for smart cities & communities - Lombardia
14. Lombardy Regional Government
15. IDM Südtirol
16. Provincial Government of Autonomous Province of Bolzano
17. HIT – Hub Innovazione Trentino
18. Polo Meccatronica
19. Provincial Government of autonomous province of Trento
20. Trentino Sviluppo
21. Veneto Regional Government Economic Promotion and Internationalization Department
22. Veneto Regional Government Research Directorate for Innovation and Energy
23. Innoveneto
24. Agenzia Lavoro & Sviluppolimpresa
25. Port Network Authority of the Eastern Adriatic Sea
26. CNA Innovation
27. Emilia Romagna Regional Government
28. Navacchio Technology Park (NTP) S.p.A.
29. Regional Government of Tuscany
30. Developumbria
31. Regional Government of Umbria, Internationalization division
32. Cluster Marche
33. Marche Regional Government, Innovation, research and internationalization department
34. Marche Manufacturing Industrial Innovation Cluster
35. Lazio Innova
36. Lazio Regional Government
37. Abruzzo Development S.p.A.
38. Regional Government Abruzzo, Department of Economic Development, Labor, Education, Research and University Policies
39. Regional Government Molise
40. Regional Development Agency - Sviluppo Italia Molise
41. Campania Regional Government
42. Regional Government of Puglia, International Relations Section
43. Pugliasviluppo
44. Basilicata Development Spa  
45. Basilicata Regional Government, Department of Internationalization, Scientific Research and Technological Innovation  
46. Calabria Regional Government, Department of Economic Development  
47. ICT Innovation Pole of Calabria  
48. Catania Ricerche Consortium  
49. Science and Technology Park of Sicily  
50. Etna High Tech  
51. CRS4 Ideas become life  
52. Sardegna Ricerche

**Latvia**

1. Regional Government of Riga  
2. Riga Business Chamber  
3. Investment and Development Agency of Latvia (LIAA) Japan  
4. Regional Government of Kurzeme  
5. Latvian Chamber of Commerce and Industry (LCCI)  
6. Latgale Regional Government, Latgale Business Center  
7. Latgale Region Development Agency  
8. Regional Government of Zemgale  
9. Regional Government of Vidzeme  
10. Latvian High Added Value and Healthy Food Cluster

**Lithuania**

1. Agency for Science, Innovation and Technology  
2. The Association of Lithuanian Chambers of Commerce, Industry and Crafts (ALCCIC)

**Luxembourg**

1. Luxinnovation  
2. Ministry of the Economy

**Malta**

1. The Malta Council for Science and Technology

**Netherlands (The)**

2. Energy Valley  
3. Province Groningen  
4. NOM  
5. The Northern Netherlands Provinces  
6. Water Alliance  
7. Province Friesland  
8. Province Drenthe  
9. Development Agency East Netherlands  
10. KIEMT  
11. Province Overijssel
12. Food Valley
13. Health Valley
14. Province Gelderland
15. Horizon Flevoland
16. Province Flevoland
17. Smart Industry Noord-West
18. Province Utrecht
19. Economic Board Utrecht
20. Development Company Holland North
21. Province North-Holland
22. Economic Board Zuid-Holland
23. InnovationQuarter
24. Province of Zuid-Holland
25. Circular Biobased Delta
26. Province of Zeeland
27. Brainport Development
28. Development Company Brabant
29. NV LIOF, Limburg Investment and Development Corporation
30. Province of Limburg (NL)

Poland

1. Malopolska Regional Development Agency
2. Marshal Office of the Malopolskie region, Department of Sustainable Development
3. Marshal Office of the Śląskie Region
4. Silesian Entrepreneurship Centre
5. Marshal Office of the Wielkopolska Region
6. Wielkopska Agency of Entrepreneurship Development
7. Wielkopolskie Centre of Clustering
8. Marshal Office of the Westpomeranian Region
9. Center for Bioimmobilization and Innovative Packaging Materials"
10. Techno Park Pomerania
11. Westpomeranian Agency for Regional Development
12. Marshal Office of Lubuskie Region
13. Marshal Office of the Dolnośląskie Region
14. Wroclaw Technology Park
15. Marshal Office of the Opolskie Region, Department of International Cooperation and Regional Promotion
16. Opolskie Centre for Economy Development
17. Marshal Office of Kujawsko-Pomorskie Voivodship
18. Regional Innovation Centre
19. Torun Agency for Regional Development
20. Marshal Office of Warmia and Mazury
21. Regional Development Agency of Warmia and Mazury
22. Marshal Office of the Pomorskie region
23. Pomerania Development Agency
24. Pomeranian Science and Technology Park
25. Bionanopark
26. Marshal Office of Lodz Region
27. Lodz Agency of Regional Development
28. Lodz Agency of Regional Development
29. Kielce Technology Park
30. Marshal Office of Swietokrzyskie Region
31. Regional Centre for Innovation and Technology Transfer Ltd
32. The Chamber of Commerce “Kielce Trade Fair Cluster”
33. Marshal Office of Lubelskie Region
34. Eastern Poland IT Company Cluster
35. Marshal Office of the Podkarpackie Region
36. Rzeszow Regional Development Agency
37. The Aviation Valley Association
38. East-West Science and Technology Park in Suwalki
39. Innovative Eastern Poland Scientific Association
40. Marshal Office of Podlaskie region
41. Podlaska Regional Development Foundation
42. Mazovia Development Agency Plc
43. The Office of the Marshal of the Mazowieckie Voivodeship in Warsaw

Portugal

1. Norte Regional Coordination and Development Commission (CCDR-N), Project Coordination Division and Institutional Networks
2. PortusPark – Porto Association of Science and Technology Parks
3. Algarve Regional Coordination and Development Commission (CCDR-Alg)
4. Centro Regional Coordination and Development Commission (CCDR-C)
5. Instituto Pedro Nunes - Association for Innovation and Development in Science and Technology (IPN)
6. DNA Cascais - Regional Entrepreneurship Agency
7. Invest Lisboa
8. Lisbon Regional Coordination and Development Commission (CCDR-LVT)
9. ADRAL – Alentejo Regional Development Agency
10. Alentejo Regional Coordination and Development Commission (CCDR-A)
11. ARDITI – Regional Agency for the Development of Research, Technology and Innovation
12. Ministry of Foreign Affairs, Secretary of Foreign Affairs and Cooperation
13. National Innovation Agency (ANI)

Romania

1. AgroTransilvania Cluster
2. Cluj IT Cluster
3. Regional Development Agency - North West Region, Romania
4. Transilvania IT Cluster by ARIES T
5. Transylvanian Furniture Cluster
6. TREC Transylvanian Energy Cluster
7. AGROFOOD - The Regional Cluster of Food Industry and Products
8. Regional Development Agency – Centru (ADRC), Romania
9. Transylvania Textile & Fashion Cluster
10. Transylvanian Mechanical Engineering Cluster
11. Transylvania Regional Spa-Tourism Regional Cluster
12. Astrico North-East Textile Cluster
13. BioROne Biotechnology Cluster
14. ICONIC – Interactive Cluster of New Media Industry City of Iasi
15. North-East Innovative Regional Cluster for Structural and Molecular Imaging (IMAGO-MOL)
17. INOMAR Cluster
18. South-East Regional Development Agency (SE RDA)
19. The Software Park
20. South-Muntenia Regional Development Agency
21. Bucharest Ilfov Regional Development Agency
22. Bucharest – Ilfov Regional Mechatronics Cluster – Mechatrec
23. Electronic Innovation Cluster – ELINCLUS
24. IND-AGRO-POL Competitiveness Pole
25. MEDGreen Cluster
26. Romanian Cluster PROECO-CBRNE
27. Romanian Textile Concept Cluster
28. Automotive Sud Vest Oltenia Competitiveness Pole
29. Construct Cluster Oltenia Association
30. ICT – Regional Competitiveness Pole Oltenia Cluster
31. Regional Development Agency - South-West Oltenia, Romania
32. The Romanian Sustainable Energy Cluster - ROSENC
33. ROVEST Cluster

**Slovak Republic**

1. Regional Government of Bratislava Region
2. Slovak Research and Development Agency
3. Slovak Investment and Trade Development Agency
4. The Business and Innovation Centre - BIC Bratislava
5. The Trnava Self-Governing Region
6. The Slovak Business Agency
7. The Nitra Self-Governing Region
8. Banská Bystrica Self-Governing Region
9. The Žilina Self-Governing Region
10. Prešovský Self-Governing Region
11. The Košický Self-Governing Region

**Slovenia**

1. Public Agency for Entrepreneurship, Internationalisation, Foreign Investment and Technology
2. Slovenian Research Agency, Research Infrastructure and International Cooperation Division
3. Ministry of Economic Development and Technology

Spain

1. AIMEN Technology Centre
2. Galician Energy Institute
3. Galician Innovation Agency (GAIN)
5. IGAPE - Galician Institute for Economic Promotion
6. European Business and Innovation Centre (BIC) of the Principality of Asturias
7. IDEPA - Institute of Economic Development of the Principado de Asturias
8. Foundation for the Promotion of Applied Scientific Research and Technology in Asturias (FICYT)
9. Regional Government of the Principality of Asturias
10. Regional Ministry of Innovation, Industry, Tourism and Trade of Cantabria’s Government
11. PCTCAN – Scientific and technological park of Cantabria
12. SODERCAN - Society for Regional Development of Cantabria
13. Cluster Energia
14. Basque Government, Department of Economic Development and Infrastructure
15. IKERBASQUE. Basque Foundation for Science
16. INNOBASQUE- Basque Innovation Agency
17. "Orkestra-Basque Institute of Competitiveness
18. SPRI - Basque Business Development Agency
19. Government of Navarre
20. SODENA
21. Agency for the Economic Development of La Rioja, ADER
22. Government of La Rioja, Directorate General of Innovation
23. Government of Aragon
24. Government of Castilla y Leon
25. Government of Castilla-La Mancha, Ministry of Economy, Business and Employment
26. Extremadura Avante, SLU
27. Foundation for the science and technology development and Extremadura Science and Technology Park
29. ACCIÓ - Agency for business competitiveness
30. Generalitat Valenciana (Government of Valencia)
31. Innovation Agency for the Valencian Region
32. Valencian Institute of Business Competitiveness (IVACE)
33. Government of the Illes Balears
34. Government of Andalusia
35. INFO - Institute for the Promotion of the region of Murcia
36. Canarian Agency for Research, Innovation and Information Society (ACIIISI)

Sweden
1. Office of Regional Planning, Stockholm County Council
2. STING - Stockholm Innovation and Growth
3. Stockholm Business Region
4. Region Östergötland
5. County Administrative Board of Södermanland
6. County Administrative Board of Västmanland
7. Örebro Regional Development Council
8. Uppsala Innovation Centre UIC
9. Uppsala Regional Council
10. Kalmar County Government
11. Region Kronoberg
12. Regional Development Council of Jönköping County
13. ALMI Business Partner
14. County Council Blekinge
15. Innovation Skane
16. Region Skane
17. NetPort Science Park
18. Skane Food Innovation Network
19. Sustainable Business Hub
20. TelecomCity
21. Fiber Optic Valley
22. Future Position X
23. Region Gävleborg
24. Region Norrbotten
25. Region Dalarna
26. The Paper Province (TPP)
27. IUC Dalarna
28. TripleSteelix
29. BizMaker
30. County Administrative Board of Jämtland
31. County Administrative Board of Västernorrland
32. Iuc Z-Group AB
33. Processum Biorefinery Initiative
34. Region Jämtland Härjedalen
35. County Administrative Board of Norrbotten
36. Innovation Office North
37. Region Västerbotten

Japan

1. Hokkaido EU Association
2. Sapporo City IoT Innovation Promotion Consortium
3. Hokkaido Bio-industrial Cluster Forum
4. Sapporo City
5. Aomori Support Center for Industrial Promotion
6. Iwate Industrial Promotion Centre
7. Sendai Finland Well-being Centre
8. Tokeiren Business Centre
9. Tsuruoka Science Park
10. Yamagata Industrial Technology Promotion Organization
11. Utsukushima Next-Generation Medical Industry Agglomeration Project
12. Fukushima Renewable Energy Institute, AIST
13. Fukushima Prefectural Government, Commerce, Industry & Labour Department, Medical Industry Cluster Promotion Unit
14. Fukushima Medical Welfare Equipment Industry Council
15. Hitachi Regional Industrial Support Center
16. Saitama Industrial Promotion Public Corporation (SIPC)
17. Chiba Industrial Technology Research Institute
18. Chiba Industrial Promotion Center, Tokatsu Techno Plaza
19. Smart City Institute Japan
20. Life Science Innovation Network Japan, Inc. (LINK-J)
21. Ota Ward Industry Promotion Association
22. Shinagawa Ward Regional Promotion Department
23. City of Yokohama Economic Affairs Bureau, Life Innovation Promotion Division
24. Economic Development Corporation IDEC Yokohama
25. Kihara Memorial Yokohama Foundation for the Advancement of Life Sciences
26. Kawasaki King Skyfront
27. Niigata Industrial Creation Organization
28. Medicine of Toyama
29. Nagano Techno Foundation
30. Pharma Valley Project
31. Aichi Robot Industry Cluster Promotion Council
32. Aichi Science and Technology Foundation
33. Greater Nagoya Initiative Center
34. Aichi-Nagoya International Business Access Center (I-BAC)
35. Chubu Medical Devices Manufacturers Association
36. Advanced Science, Technology & Management Research Institute of KYOTO (ASTEM)
37. The Consortium for Information Society in Kyoto
38. Kyoto Research Park
39. Kyoto Prefecture Cultural Academic Research City Promotion Division
40. Osaka Bio Headquarters, Osaka Prefectural Government Life Science Industry Division
42. Osaka Foreign Business Attraction Center
43. International trade fair site @ INTEX Osaka (Osaka International Economic Recovery Center)
44. Hyogo Business Support Center Tokyo
45. The Kobe Biomedical Innovation Cluster (KBIC), Foundation for Biomedical Research and Innovation at Kobe (FBRI)
46. Tottori Industrial Promotion Organization
47. Tottori Bio Frontier
48. Yamaguchi Industry Promotion Foundation
49. Koriyama Regional Technopolis Promotion Organization
50. Shikoku TLO (Technology Licensing Organization)
51. Kochi Industrial Promotion Center
52. Kyushu Semiconductor Industries & Technology Innovation Association (SIIQ)
53. Fukuoka Industry-academia-government Co-creation, Institute of Systems, Information
Technologies and Nanotechnologies (ISIT)"
54. Fukuoka Bio Valley, Kurume Research Park
55. Japan Cosmetic Center
56. Kyushu Regional Bio Cluster, Kyushu Bio Cluster Conference
57. Hokkaido Prefecture
58. Aomori Prefecture
59. Tokyo Metropolitan Area
60. Nagano Prefecture
61. Fukui Prefecture
62. Gifu Prefecture
63. Aichi Prefecture
64. Kyoto Prefecture
65. Okayama Prefecture
66. Tokushima Prefecture
67. Fukuoka Prefecture
68. Saga Prefecture
69. Oita Prefecture
70. Okinawa Prefecture