

# The Railway Market in Japan

September 2016

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## Contents

1. Executive summary.....	2
2. Introduction.....	3
3. Market structure.....	4
a. Network overview (technical characteristics) .....	4
b. Public & private operators.....	6
c. Large operators .....	7
d. Equipment suppliers and manufacturers.....	8
e. Passenger & Freight volumes .....	10
i. Cargo transportation.....	12
4. Market challenges .....	13
a. Market dichotomy: Profitable main island vs loss-making periphery: Impact of population decrease and urbanization.....	13
b. Intensified competition: Upcoming Low Cost Carriers (LCCs).....	14
c. Operational Safety Clause .....	16
5. Responsible Authorities.....	17
a. Role of MLIT (Regulation, promotion, coordination) .....	17
b. Japan Railway Construction, Transport and Technology Agency (JRTT) .....	18
c. Local governments .....	18
d. Supervisory authorities.....	19
6. Market Entry.....	20
a. Procurement practices .....	20
b. Government owned operators: Public JRs, Tokyo Metro, Transportation Bureaus .....	22
c. Private operators (Including 3 <sup>rd</sup> sector companies) .....	23
d. Who to target? .....	23
7. Trends .....	24
a. Planned expansions.....	24
b. Cross-over into other sectors: diversification .....	26
c. Overseas expansion.....	26
d. Privatization.....	27
e. Urban transportation improvement: LRT.....	27
8. Summarizing SWOT Analysis Japanese Railway Market Entry .....	28
a. Strengths.....	28
b. Weaknesses .....	29
c. Opportunities .....	30
d. Threats.....	30
9. European companies active in the Japanese railway sector .....	31
10. Conclusion & Recommendations .....	32
11. Appendices .....	33
a. List of railway operators in Japan .....	33
b. List of suppliers.....	49

## 1. Executive summary

This report gives an overview of the current situation in the Japanese railway market. The market is very diverse, with large players active in a broad variety of activities, ranging from core-transportation services to production of rolling stock and real-estate development.

The report briefly explains some technical features of the railway network and gives an overview of the kinds of operators that are active in the sector. The market is characterized by a small number of large private or privatized operators, which are mostly profitable and active in metropolitan areas on the main island of Honshu. On the other hand, there is a large number of smaller operators, with many loss-making and in need of government support. These are mainly active in regional areas and on the other large islands.

The sector is characterized by strong crosslinks (both formally and informally) between all actors and vertically organized. Railway companies do not compete in terms of concessions as is seen in Europe. The dominant railway companies are not only active as operators/provider of railway services, but are also involved in development and production of their rolling stock and infrastructure via a large number of group companies.

Rapid ageing of the Japanese population and the ongoing concentration into urban areas, is seen as one of the main challenges shaping the market. Low Cost Carriers (LCCs) are expected to become a competitor for the long-distance train-services, with the increase of slots at domestic airports.

The Report also pays attention to procurement practices in the sector. The fully privatized JR companies were recently removed from the public procurement framework, after the EU Commission ended its opposition to this. The companies instead have promised to publish their procurement on English-language website for the benefit of foreign suppliers. Some movement is also expected with regard to application of the Operational Safety Clause (OSC) which has long kept transportation related procurement out of the public procurement framework.

In terms of trends in the market, attention is paid to the further diversification in activities of railway companies into business activities surrounding the provision of railway services. Also, the Japanese government's ambitions to increase the exports of infrastructure including railways, is seen as a trend that might offer business opportunities to EU SMEs, as there will be an increased need for international supplier networks and local expertise.

In a summarizing SWOT analysis, various aspects of the Japanese railway market are highlighted, with ageing, urbanization and increased infrastructural exports regarded as opportunities for European SMEs, while financial difficulties of local governments, population decrease, ambiguous local standards and political sensitivities are identified as threats.

The Japanese railway market is seen as sophisticated, mature market, with high standards in service and punctuality, which developed in relative isolation from the rest of the world. Entry into the market is a challenging endeavor requiring patience and tenacity. While it is not reasonable to expect that foreign companies will be winning railway concessions or projects to build complete systems in the foreseeable future, there are developments, such as the more active pursuit of large JR companies for new foreign suppliers, that can be seen as signs that the market will be more welcoming to foreign companies.

## 2. Introduction

The railway market in Japan is a very broad topic to cover a brief report. The delivery of transport services, be it freight or passengers, requires a broad range of services ranging from physical construction of rolling stock, tracks, stations and terminals to provision of actual operations and information to customers.

In the course of more than 125 years, Japan has managed to create a rail transportation system which is probably one of the most sophisticated and highest in quality in the world, with an unrivalled safety record and level of punctuality when set against the number of passenger/freight kilometres. In particular, in larger metropolitan areas, railway stations have become centres of communities and function as critical hubs of human activity.

The Japanese railway market is an all-out Japanese affair, consisting of an intricate maze of large-to-small scale railway operators, constructors and railway-related service providers. Despite various attempts over the years, foreign railway-related companies have made very little inroads into the market for various reasons, both regulatory and culturally.

The European Commission in particular, has made ‘opening up’ the Japanese railway market to European companies as one of its focal points in the ongoing negotiations to conclude an EU-Japan Economic Partnership Agreement (EPA). This effort is particularly driven by the entry of Hitachi, one of Japan’s largest railway infrastructure builders, into the European market when it secured a contract to build trains for a railway service in the UK.

When attending a meeting between European and Japanese stakeholders in the railway industry in the Fall of 2015 in Tokyo, where government officials and business representatives met to discuss the issues in the railway market, the differences in attitudes were quite striking. On the European side, a strong sense of frustration, bewilderment and even sense of resignation prevailed, stating the market is closed and demanding more transparency and international standards, while the Japanese side showed their slides giving (isolated) examples where foreign companies were supplying goods and services and giving statements that “We welcome proposals from EU suppliers”. Basically, telling the European side that there are plenty of opportunities, you are just not trying hard enough.<sup>1</sup>

As with most things, the truth is probably somewhere in the middle. Securing large, economically viable, railway projects in Japan of the scale of the contract Hitachi secured in the UK, will probably be beyond the reach of large multinational foreign companies in the foreseeable future (if ever). However, for relatively smaller suppliers of innovative railway-related technologies and services, which are the target audience for this Report, a successful business case might exist in the Japanese market.

This report tries to give a, by no means complete, overview of the Japanese railway market in terms of its structure and actors, tries to identify opportunities for EU companies active in this sector and to give some suggestions on how this challenging market could be approached.

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<sup>1</sup> Japan-EU Railway Industrial Dialogue, November 10, 2015 jointly organized by MLIT and European Commission.

### 3. Market structure

#### a. Network overview (technical characteristics)

Total length (2014)	Approx. 25,000 km
Shinkansen high-speed tracks (March 2016)	2,764 km
Operators (2015)	211
Railway gauges	Conventional: Narrow gauge (1067 mm) Shinkansen: Standard gauge (1435)
Electrification	JR: 1500V DC, 20KV AC (conventional) 25KV AC (Shinkansen) Private: 600V DC, 750V DC, 1500V DC Frequencies: 50Hz (Eastern Japan), 60 Hz (Western Japan)
Signalling systems (ATP)	ATS (Automatic Train Stop) ATC (Automatic Train Control) Shinkansen: DS-ATC, RS-ATC, KS-ATC, ATC-NS (European Train Control System (ETCS) equivalent)
Dispatch Centres	COMTRAC (Computer-aided Traffic Control) by JR Central COSMOS (Computerized Safety, Maintenance and Operation Systems of Shinkansen by JR East.

Sources: MLIT; [Transport Analysis, Railway in Sweden and Japan – a comparative study \(November 2014\)](#); Japan Railways in figures 2015 edition (運輸政策研究機構、数字で見る鉄道 2015), (Institution for Transport Policy Studies, October 2015) p. 22

#### Shinkansen

Symbol of Japanese railway sophistication, the first Shinkansen line opened at the time of the Tokyo Olympics of 1964 and has since been extended to cover the entire country almost from North to Southwest, spanning over 2,700 km.<sup>2</sup> The network of Shinkansen lines is still being enlarged, with a number of extensions recently opened such as the Hokkaido Shinkansen in March of this year and further extensions planned to cities such as Sapporo, Tsuruga and Nagasaki. (See chart below.) Shinkansen extensions are actively pushed by regional governments as a means to revitalize their economies.

<sup>2</sup> Japan Railways in figures 2015 edition (運輸政策研究機構、数字で見る鉄道 2015), (Institution for Transport Policy Studies, October 2015) p. 22 with recently opened Hokkaido Shinkansen added.



## b. Public & private operators

**Table 1: Railway and tram operators in Japan. April 1<sup>st</sup> 2015**

Operator	#
Former Japan National Railways (JR) companies	6
Large private operators	16
Second tier	5
Public (Municipal) operators	11
Small and medium sized operators	128
Cargo railways	12
Monorail operators	9
New Transportation Systems	9
Cable car operators	14
Trackless trains	1
<b>Total</b>	<b>211</b>

As of April 2015, 211 companies and entities were registered with MLIT as railway operators in Japan.<sup>3</sup> A number of these are involved in multiple activities, combining operations of both railway and other transportation services. Since the privatization and split up of the JR National Railways in 1987, the railway market is dominated by ‘private’ companies, in particular those on the main island of Honshu, concentrated around the metropolitan areas of Tokyo, Nagoya and Osaka. *Private* is put between quotation marks here, as the JR companies gradually fully privatized i.e. stock became tradeable, much later.

Three of the fully privatized Honshu-based JR companies, East Japan Railway Company (JR East), Central Japan Railway Company (JR Central) and West Japan Railway Company (JR West) dominate the market with a combined market share (in terms of passenger km) of over 50% in 2015.<sup>4</sup> Stocks of the remaining three JR companies; JR Hokkaido, JR Shikoku and JR Kyushu are still in government hands. Although they are also slated for full privatization, the JRs in the periphery are all facing difficult business circumstances and requiring financial support from the central government.

The Railway Business Act<sup>5</sup> makes a distinction between three types of railway businesses:

- *Type I railway businesses* provide transportation services using their own rail-network. The largest railway operators belong to this type;
- *Type II railway businesses* provide transportation services using tracks other than those constructed by the operator. This includes for example JR Freight Railway Company;
- *Type III railway businesses* are businesses involved in construction of railway facilities to hand over to Type I business and in the construction and management of railway facilities which are then rented by operators from the Type II category.

The majority of the small to medium-sized railway companies are classified as so-called ‘3<sup>rd</sup> sector companies’, which are companies with shared public and private ownership. This name should not be confused with the term 3<sup>rd</sup> sector elsewhere, where it often refers to NGOs. This category of companies includes:

- loss-making enterprises managing local lines that were separated from previously government owned railways and JR companies;
- those operating railroad lines parallel to Shinkansen lines under development;

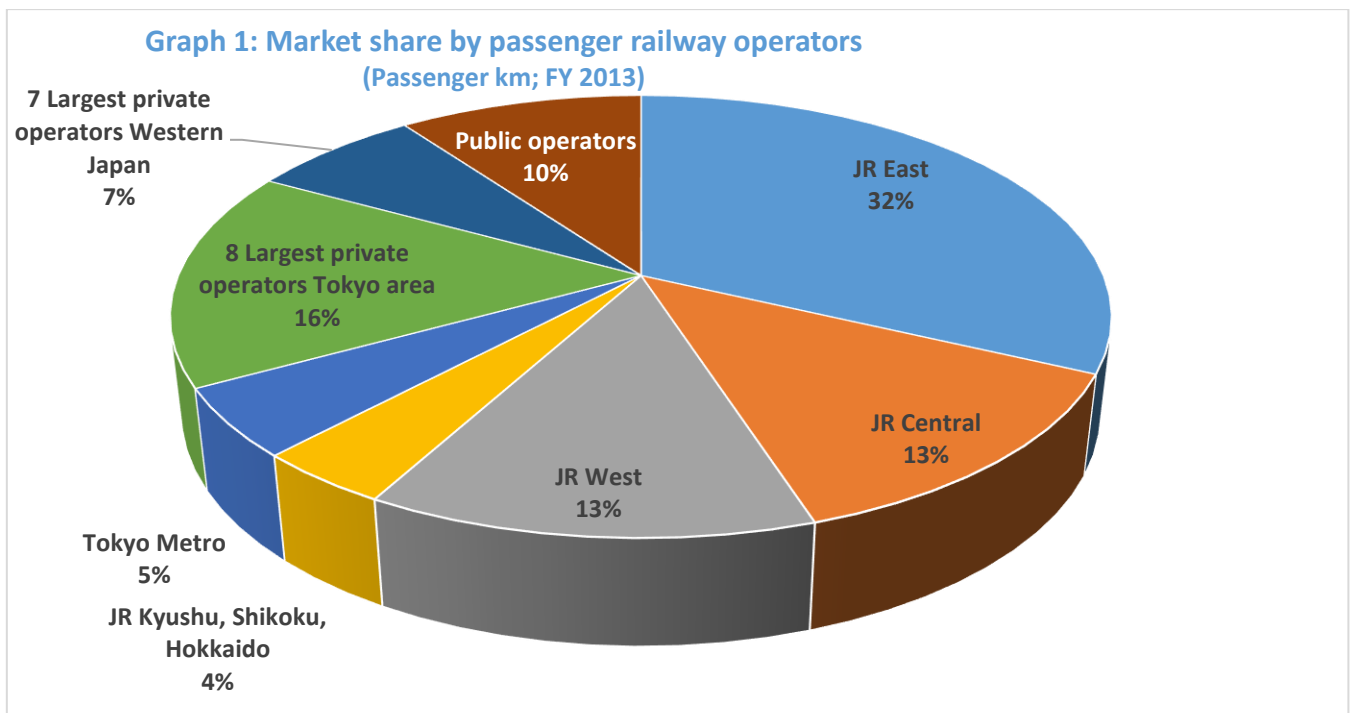
<sup>3</sup> MLIT, List of railway and tram operators. April 1, 2015 <http://www.mlit.go.jp/common/000229504.pdf>

<sup>4</sup> Japan Railways in figures. 2015 edition, p. 79

<sup>5</sup> MLIT, English translation of Railway Business Act [http://www.mlit.go.jp/english/2006/h\\_railway\\_bureau/Laws\\_concerning/01.pdf](http://www.mlit.go.jp/english/2006/h_railway_bureau/Laws_concerning/01.pdf)

- freight line (*rinkai tetsudo*) servicing coastal industrial areas;
- Successor companies of loss-making private railway companies and companies established to manage and develop transportation services such as New Transportation Systems (NTS) and monorail systems in metropolitan areas.<sup>6</sup>

The number of 3<sup>rd</sup> sector railway companies has increased quite significantly in the past few years from 35 in 2008 to close to 80, replacing fully privatized operations. This is due to the impact of the more rapid ageing of the population in the periphery and furthermore due to the concentration of the population in metropolitan areas which is making the upkeep of railway services in the countryside more difficult. Many of these companies are therefore loss-making and need to be propped up with public money.



Source: MLIT, 鉄道統計年報 [平成 25 年度] Train statistics yearbook 2013 [http://www.mlit.go.jp/tetudo/tetudo\\_tk2\\_000027.html](http://www.mlit.go.jp/tetudo/tetudo_tk2_000027.html)

### c. Large operators

The largest railway operators in Japan are mostly consisting of a core-railway company with a large number of supporting group companies surrounding it. These companies do not only engage in activities concerning railway transportation in a narrow sense, but also have broad interests in other sectors, such as department stores and hotels. For example, a large private operator such as Tokyu Corporation is said to have more than 250 companies attached to its parent company Tokyu Group.<sup>7</sup> Companies within this group range from smaller train operators, bus service

<sup>6</sup> 日本民鉄道協会、The Association of Japanese Private Railways, Dictionary of Railway terms <http://www.mintetsu.or.jp/knowledge/term/147.html>

<sup>7</sup> Tokyu Group, List of group companies (In Japanese) <http://tokyugroup.jp/about/grouplist/>



providers, department stores, DIY chains, hotels and resort facilities, real estate companies to advertising and personnel dispatch companies.

While the presence of group companies not directly related to the railway business activities will not have an impact on business decisions, the presence of in-group railway infrastructure related companies, such as railway carmakers, IT-developers and railway constructors, most likely will. For competing companies outside of the group, including foreign companies, it will be more difficult to get an equal treatment, when offering their services to these conglomerates.

#### d. Equipment suppliers and manufacturers

As was stated in the previous paragraph, the larger Japanese railway operators dominating the market, often have rolling stock, equipment, infrastructure and related service suppliers, incorporated in their own company group. The Japan Association of Rolling Stock Industries (JARi), the major association of rolling stock producers in Japan, has the following breakdown of its members.<sup>8</sup>

**Table 3: Breakdown of JARi members**

Activity	Number
Railcar body, construction of rolling stock	7
Electric equipment, parts	12
Non-electric equipment	22
Commodities manufacturers, raw material suppliers, maintenance service providers etc. (Includes some foreign companies)	78
Designated members (large transportation providers, such as JR companies)	33

The crosslinks between railway operators and rolling stock producers are visible, if one looks at the ownership-relations. With the exception of Hitachi Ltd. and Kawasaki Heavy Industries, the main rolling stock producers have close ties with major rail operators.

<sup>8</sup> JARi member list, [http://www.tetsushako.or.jp/english/list\\_member.html](http://www.tetsushako.or.jp/english/list_member.html)

Table 2: Largest railway operators in Japan (turnover)

Name*	Area of operations	Revenue (billion €) (FY)**	Ordinary profit (billion €) (FY)**	Group companies ***
East Japan Railway Company (JR)	Tokyo, Northeast Honshu	22.05 (2015)	3.29 (2015)	67
West Japan Railway Company (JR)	Western Honshu and Central Japan Sea Coast	11.16 (2015)	1.25 (2015)	69
Tokyu Corporation	Southwest Tokyo, East Kanagawa	8.40 (2015)	0.54 (2015)	255
TOBU Railway CO., LTD.	Tokyo, Chiba, Saitama, Tochigi, and Gunma	4.42 (2015)	0.43 (2015)	88
Odakyu Electric Railway Co., Ltd.	Tokyo, Kanagawa	4.08 (2015)	0.35 (2015)	106
Keio Corporation	Southwest Tokyo, North Kanagawa	3.20 (2015)	0.29 (2015)	45
Tokyo Metro Co., Ltd.	Tokyo	3.14 (2015)	0.68 (2015)	-
Keikyu Corporation	Tokyo, Kanagawa	2.43 (2014)	0.21 (2014)	61
Hankyu Corporation	Osaka, Kobe, Takarazuka and Kyoto	1.47 (2015)	0.33 (2014)	141
JR Hokkaido - HJRCorporation	Hokkaido Island (Northern Japan)	1.34 (2015)	-0.22 (2015)	26
SEIBU RAILWAY Co.,Ltd	Tokyo	1.21 (2015)	0.20 (2014)	54
Shikoku Railway Company (JR)	Shikoku Island (South Japan)	0.22 (2015)	-0.08 (2015)	21
Sagami Railway Co. Ltd. (Sotetsu)	East Kanagawa	1.99 (2015)	0.24 (2015)	28
Keisei Electric Railway Co., Ltd	Tokyo, Chiba	1.93 (2015)	0.19 (2015)	124
Central Japan Railway Company (JR)	Honshu largely between Tokyo and Osaka	12.86 (2015)	3.90 (2015)	30
Nishi-Nippon Railroad Co., Ltd.	Fukuoka area, Kyushu	2.80 (2015)	0.14 (2015)	83
Kintetsu Corporation	Osaka, Kyoto, Nara, Nagoya area	1.77 (2015)	0.24 (2015)	155
Kyushu Railway Company (JR)	Kyushu Island (South-western Japan)	2.73 (2014)	0.16 (2014)	35
Nagoya Railroad Co.,Ltd. (Meitetsu)	Aichi, Gifu	4.69 (2015)	0.34 (2015)	143
Nankai Electric Railway Co., Ltd.	Osaka	1.69 (2015)	0.21 (2015)	56
Hanshin Electric Railway Co.,Ltd.	Osaka, Kobe	0.65 (2015)	0.62 (2015)	141
Keihan Electric Railway Co., Ltd.	Osaka, Kyoto, Shiga	0.72 (2015)	0.08 (2015)	67

\*Order by passenger transport incomes \*\* €1=¥130 \*\*\* Estimates, Sources: [Wikipedia](https://en.wikipedia.org), and company websites

**Table 4: Rolling stock producers**

Company	Ownership	Main Clients
Japan Transport Engineering Company (J-TREC)	East Japan Railways 100%	East Japan Railway, Tokyu, Keikyu, Tokyo Metro, Nankai <sup>9</sup>
Hitachi Ltd.	No majority ownership	JR companies, Tokyo Metro, private operators
Kawasaki Heavy Industries, Ltd.	No majority ownership	JR East, JR Kyushu, JR Central, JR West,
NIIGATA TRANSYS Co., Ltd.	IHI Corporation	JR companies, smaller regional operators <sup>10</sup>
NIPPON SHARYO, LTD.	Central Japan Railways (>50%)	JR Central, JR West, JR East, Keisei, Meitetsu, Odakyu etc. <sup>11</sup>
The Kinki Sharyo Co.,Ltd.	Kintetsu Corp, Kintetsu Group, JR West ( combined 50%)	JR West, Kintetsu Corp, JR Kyushu, Tokyo Metro, etc. <sup>12</sup>
ALNA SHARYO COMPANY, LTD	Hankyu Hanshin Holdings 100%	(primarily streetcars for municipal transport systems)

According to MLIT statistics, a total of 2,240 train cars were ordered in 2014, of which 70.5% were meant for the domestic market. Close to 45% of these were destined for former JR companies. Production of train cars in that year amounted to 3,185 cars, of which 1,645 were newly built. JR companies accounted for 71.1% of these railcars.<sup>13</sup>

## e. Passenger & Freight volumes

### Passenger rail traffic

According to the most recently available statistics, in terms of the number of passenger kilometres by modes of public transport, railways in Japan take up a more than 70% share.<sup>14</sup> Passenger volumes for Japanese railways during the same period have been largely stable, with 23.6 billion passengers in 2013.<sup>15</sup>

<sup>9</sup> J-TREC, <https://www.j-trec.co.jp/eng/rw/index.html>

<sup>10</sup> <http://www.niigata-transys.com/products/03jrs/index.html>

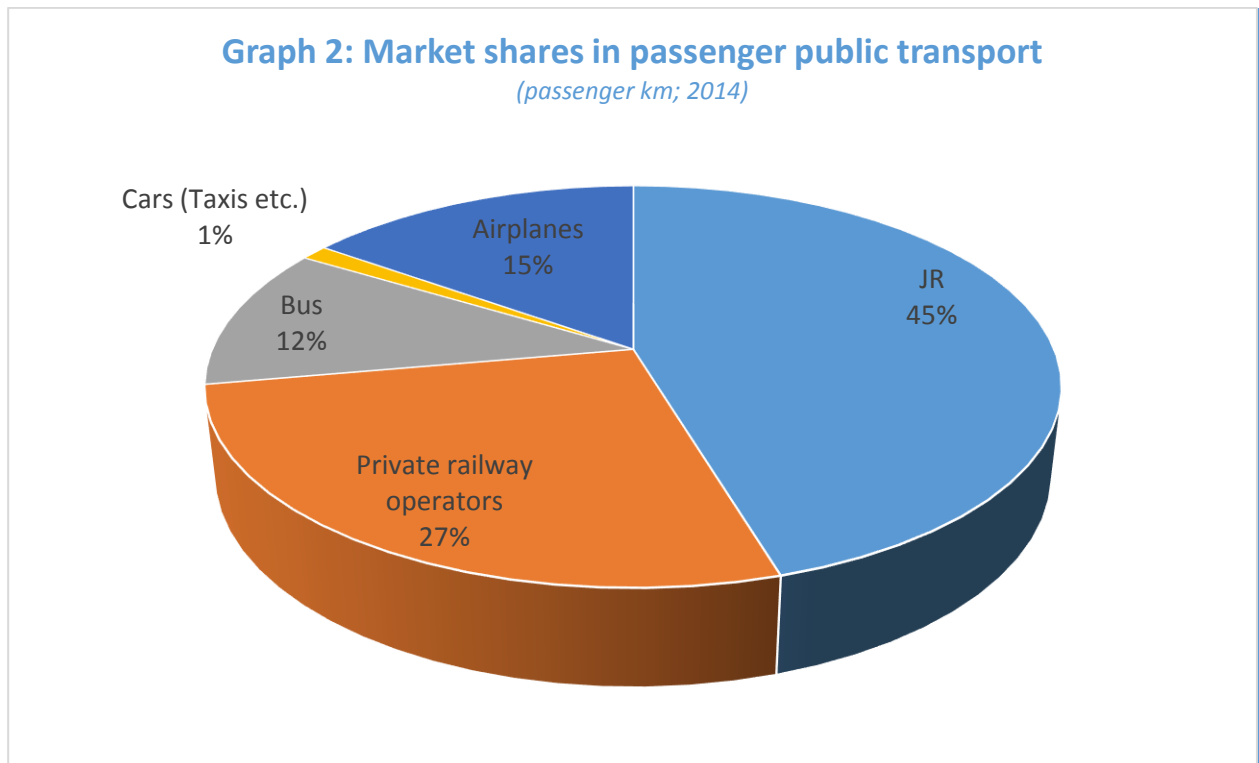
<sup>11</sup> <http://www.n-sharyo.co.jp/business/index.html>

<sup>12</sup> <http://www.kinkisharyo.co.jp/ja/products/sh/sharyoukokunai.htm>

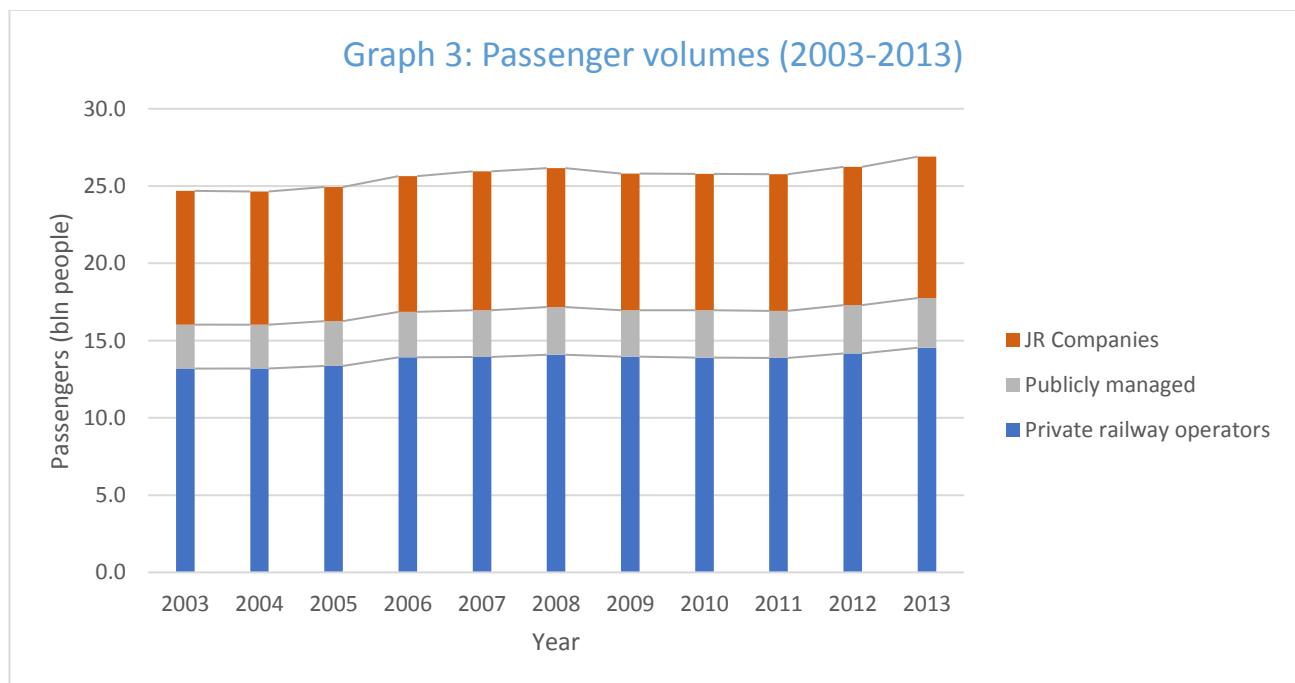
<sup>13</sup> MLIT, <http://www.mlit.go.jp/k-toukei/04/annual/index.pdf> page 1

<sup>14</sup> MLIT, <http://www.mlit.go.jp/hakusyo/mlit/h27/hakusho/h28/data/datindex.html>

<sup>15</sup> MLIT, Statistical Yearbook 2013, <http://www.mlit.go.jp/common/001129022.xls>



Source: MLIT, <http://www.mlit.go.jp/hakusyo/mlit/h27/hakusho/h28/data/datindex.html>



Source: [MLIT Yearbook 2013](#)

## Cargo transportation

The transportation of cargo by railway is dominated by JR Freight Corporation with a market share of more than 70% in 2010. When looking over the past ten years, transport by railway is seeing a gradual decline. All modes of cargo-transport have seen a decline, due likely to the prolonged economic downturn and shifting of production abroad, however railway transportation decreases more since 2000 than transport by automobiles (which covers over 90% of all cargo transport) or air.<sup>16</sup> There are however some indications that the cargo volumes by rail will increase again, due to an increasing shortage of truck drivers.<sup>17</sup>

**Table 5: Trends in freight transport by mode of transport (1999-2013)**

Unit: mln ton km

Year	Road Vehicles	Railways		Shipping	Air cargo
			JR Freight		
1999	294,648	25,101	24,702	238,330	924
2000	313,118	22,136	21,855	241,671	1,075
2001	313,072	22,193	21,907	244,451	994
2002	312,028	22,131	21,860	235,582	991
2003	321,862	22,794	22,565	218,191	1,027
2004	327,632	22,476	22,264	218,833	1,058
2005	334,979	22,813	22,601	211,576	1,075
2006	346,534	23,192	22,985	207,849	1,094
2007	354,800	23,334	23,140	202,962	1,145
2008	346,420	22,256	22,081	187,859	1,078
2009	334,667	20,562	20,404	167,315	1,043
2010	243,150	20,398	20,228	179,898	1,032
2011	231,061	19,998	19,852	174,900	992
2012	209,956	20,471	20,151	177,791	1,017
2013	214,092	21,071	20,732	184,860	1,100

Source: Japan Railways in figures. 2015 edition, p 15

<sup>16</sup> MLIT, <http://www.mlit.go.jp/common/000231638.pdf>

<sup>17</sup> MLIT, Transportation Trends 2014. Outline <http://www.mlit.go.jp/common/001098382.pdf> page 12

## 4. Market challenges

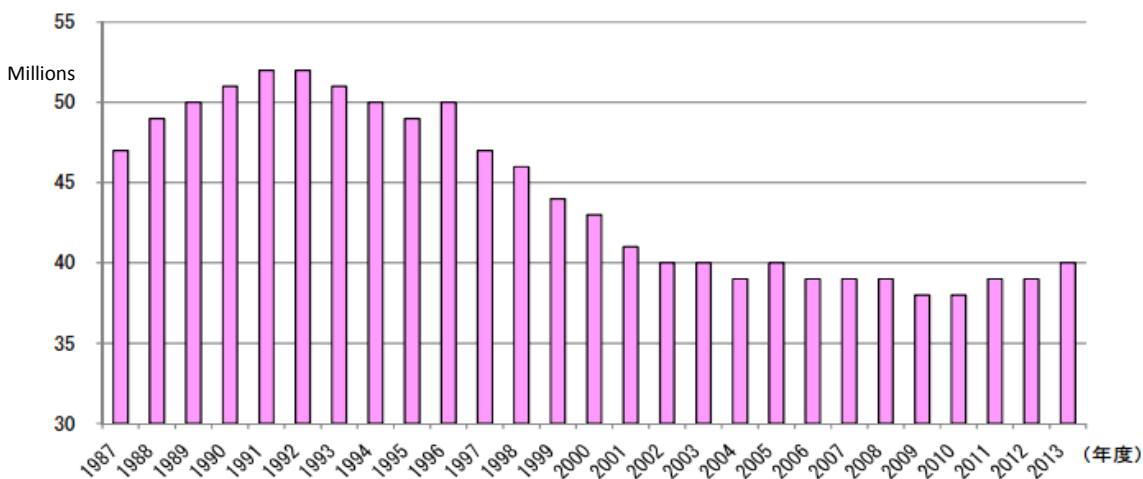
### a. Market dichotomy: Profitable main island vs loss-making periphery: Impact of population decrease and urbanization

In the Japanese railway market there is a large gap visible between operations in the large metropolitan areas and those outside. Profit-making operations are centred around the large metropolitan areas such as Greater Tokyo, Osaka, Nagoya and to a lesser extent the Fukuoka-area on the southern island of Kyushu. The large, private or fully privatised, railway operators are concentrated in these areas, where the market is propped up by the shift of the population to larger cities.

In the periphery, mostly smaller railway operators, often third sector entities, partly owned by regional or local governments, operate with small profit margins and in many cases losses. (Over 70% of operators in 2013.)<sup>18</sup> Here, the sector is facing ageing facilities and decreases in passenger volumes.

Of the larger companies active in the periphery facing difficult economic circumstances, government owned operators JR Kyushu, JR Hokkaido and JR Shikoku are prime examples. The combination of a dire financial situation and the absence of a prospect of recovery of passenger volumes, makes new investments in equipment and infrastructure more difficult and the focus is instead of maintenance of ageing infrastructure and rolling stock. In addition, the difficult financial situation of local governments, who in the past were important initiators of (mostly economically unprofitable) public infrastructure projects, no longer makes them a safety net to fall back to.

**Graph 4: Transitions in passenger volumes at local railway operators**



Source: <http://www.mlit.go.jp/common/001098382.pdf> Page 12

<sup>18</sup> MLIT, Transportation Trends 2014. Outline <http://www.mlit.go.jp/common/001098382.pdf> page 12

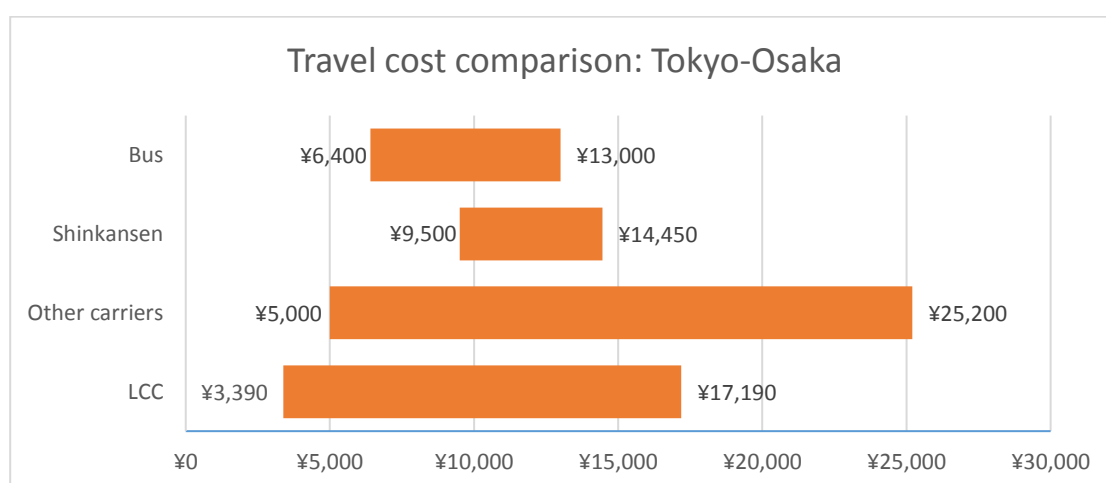
Instead the focus is on development and maintenance of public transport infrastructure in the urban conglomerates to deal with congestion, as more people are living concentrated in smaller geographical areas. While severe congestion is still seen during rush-hour in these areas, the impact of rapid ageing and low birth rates can be seen as well. The Osaka and Nagoya areas have seen a decrease in congestion-levels and passenger volumes since 2005.

In these areas, more attention is paid to improvement of convenience and accessibility of terminal stations and better connectivity, among other by allowing railway operators to use each other’s rail networks and create better connections between subway systems and suburban railways. Improving accessibility is also driven by the rapid ageing of the population specifically: - Investments in metropolitan areas are also more aimed at making stations ‘barrier free’ for the elderly and handicapped. The aim is to have all stations with more than 3,000 passengers per day and 70% of the trains accessible for these groups by 2020.<sup>19</sup>

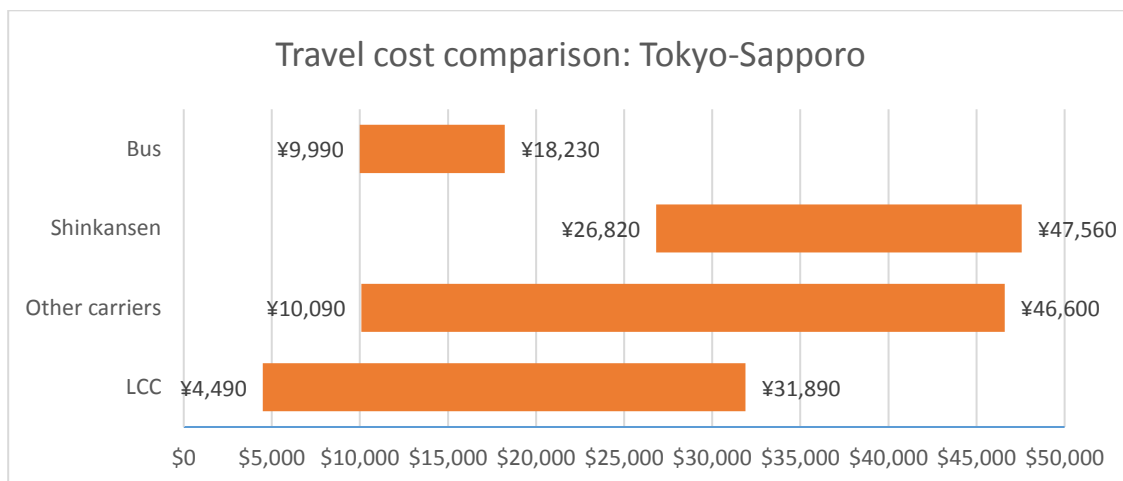
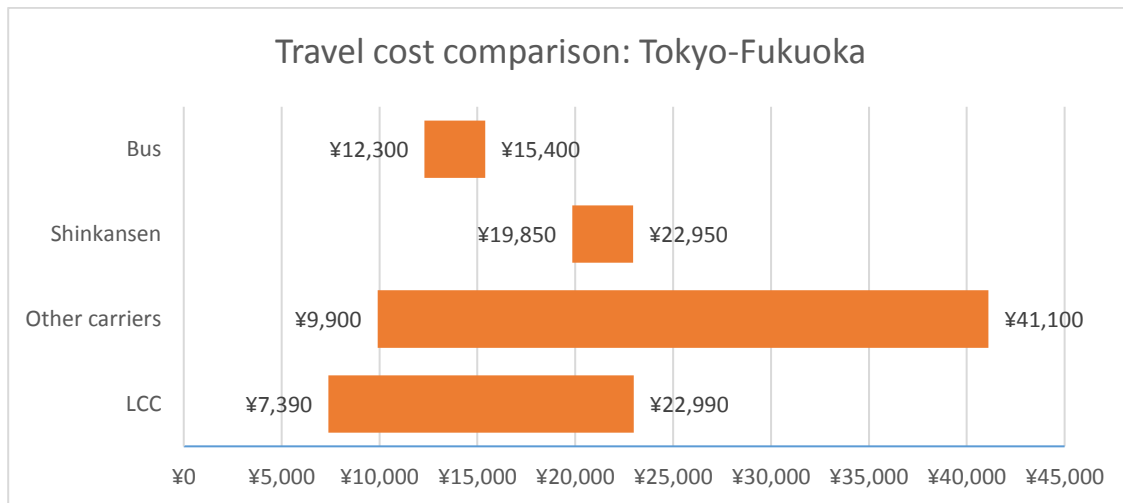
### b. Intensified competition: Upcoming Low Cost Carriers (LCCs)

Domestic air transportation in Japan was long dominated by two large carriers, Japan Airlines (JAL) and All Nippon Airway (ANA) keeping prices for domestic flights high. This kept trains (Shinkansen) as an attractive alternative for long distance travel. Air transportation has been more susceptible to the influence of energy-price fluctuations and experienced decreases in passenger volumes between 2006 and 2011. However, from 2011 onwards passenger volumes have started to recover, partly due to the entry of new low-cost carriers (LCCs) in the market since 2012. Although the share of LCCs is still comparatively low, it is expected that with the development of more routes, it will have a suppressing effect on prices and increasingly become a competitor for long-distance train travel.

Graph 5: LCC’s competitive edge? Travel-cost comparison: price ranges



<sup>19</sup> MLIT, Transportation Trends 2014. Outline <http://www.mlit.go.jp/common/001098382.pdf> page 11



**Table 6: Main-island LCC routes**

LCC	FROM	TO
Peach Aviation	Tokyo	Sapporo, Fukuoka, Osaka
	Osaka	Sapporo, Sendai, Tokyo, Matsuyama, Fukuoka, Nagasaki, Miyazaki, Kagoshima
Vanilla Air	Tokyo	Sapporo
Jet Start	Tokyo	Osaka, Takamatsu, Matsuyama, Oita, Fukuoka, Kumamoto, Kagoshima
Spring Japan	Tokyo	Hiroshima, Saga,
AirAsia Japan	Nagoya	Sapporo, Sendai, (Tokyo expected 2019)



### c. Operational Safety Clause

In discussions about the Japanese railway market, the term ‘Operational Safety Clause’ (OSC) often comes to the fore. The EU in particular has complained about the application of the OSC and the lack of transparency during the past years, that Japan is abusing the transportation related “operational safety clause” in free-trade agreements to prevent foreign firms from gaining entry to the Japanese transportation market. These complaints have become even more vocal after Hitachi Ltd. won a large contract in the UK, at the expense of local firms.<sup>20</sup>

The ‘clause’ actually refers to a note in Annex 3 of the WTO Agreement on Government Procurement for Japan stating that procurement related to the operational safety of transportation is not covered.<sup>21</sup> This applied to the 6 JR companies, JR Freight company, Tokyo Metro, Japan Railway Construction Public Corporation (JRCC) and the predecessor of the Urban Renaissance Agency.<sup>22</sup>

Differences of opinion between Japan and the EU about the OSC have prevented offering mutual access to railway markets formally for the past years, even though this does not prevent both sides to procure products from abroad, as the UK-contract to Hitachi shows. Also occasional contracts have been offered to European companies, such as the Communications Based Train Control (CBTC) technology developed by Thales for JR East in 2014.

Within the ongoing free trade negotiations between the EU and Japan there are some signs of movement, where the OSC is becoming less of a formal barrier for market entry. EU has agreed to no longer regard the three largest JR companies (JR East, JR Central and JR West) subject to government procurement regulations and in return the companies have agreed to clarify their procurement policies to foreign companies.<sup>23</sup> On the Japanese side, there are reports that there is a willingness to drop the application of the OSC for public procurement by the remaining JR companies in Hokkaido, Shikoku and Kyushu to create a more transparent playing field for foreign companies.<sup>24</sup>

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<sup>20</sup> Japan Times, <http://www.japantimes.co.jp/news/2010/03/20/national/eu-railway-firms-call-for-fair-play>

<sup>21</sup> See Annex 3 [https://www.wto.org/english/tratop\\_e/gproc\\_e/rev\\_jpn3e.doc](https://www.wto.org/english/tratop_e/gproc_e/rev_jpn3e.doc) page 3

<sup>22</sup> Toray Corporate Business Research Inc., Report on system analysis to promote Economic Cooperation with the EU (March 2013) [http://www.meti.go.jp/medi\\_lib/report/2013fy/E002522.pdf](http://www.meti.go.jp/medi_lib/report/2013fy/E002522.pdf) page 12

<sup>23</sup> Nikkei Asian Review, “EU signals end to railway row in trade talks with Japan”, August 13<sup>th</sup>, 2014 <http://asia.nikkei.com/Politics-Economy/Economy/EU-signals-end-to-railway-row-in-trade-talks-with-Japan>

<sup>24</sup> “E P A交渉でJ R九州、四国も国際入札” <http://www.saga-s.co.jp/news/saga/10101/258425>

## 5. Responsible Authorities

### a. Role of MLIT (Regulation, promotion, coordination)

The Ministry of Land, Infrastructure, Transport and Tourism (MLIT) is one of the largest ministries in Japan and has a broad spectrum of responsibilities. It is the responsible ministry for the determination and implementation of transportation policies. It has influence on the sector by means of prioritising investments, giving licenses, setting standards and also through government stock-ownership and provision of subsidies to (loss-making) railway operators. Within the ministry, the Railway Bureau is in charge of railway related policy-making and regulation.

In terms of policy, MLIT presently regards the following areas as priorities:

- Ensuring rail safety,
- Upkeep and strengthening of the rail-network (Shinkansen),
- (Promotion of) Usage of railway-related R&D,
- Improvement of railway service (Fares, accessibility),
- Foreign expansion of Japan's railways (Infrastructural exports).<sup>25</sup>

MLIT's Basic Plan on Transport Policy for 2014 to 2020 is to a large extent driven by the challenges brought up by the decline in population, depopulation of rural areas and rapid ageing of the Japanese populace.<sup>26</sup> For instance, the challenge is to deal with an increasing number of elderly unable to drive cars on the one hand, while a decrease in the general population makes the maintaining local public transportation networks more difficult and more regions becoming devoid of public transportation.

Although it is difficult to characterize an organisation, MLIT does not have a reputation of being very internationally oriented by itself. Other than METI, it deals with industrial sectors that are on the whole rather internationally uncompetitive, when compared with the sectors Japan is known for. The current interest in infrastructural exports is a project that is largely an initiative of the current Abe-government.

**Table 7: MLIT Railway Bureau structure**

Department	Sections
General Affairs	Planning, Risk management, Freight policy
Shinkansen	New High speed railway planning
Metropolitan railway policy	Promotion of functions of train stations, Transport disorder prevention
Railway business	Passenger transport supervision, regional railway support, regional railway strategy planning and coordination officer
International	International cooperation, Intellectual property protection planning officer
Technological planning	Technological development, railcar industry planning, technological standards officer
Facilities	Railway accident prevention, Environmental protection,
Safety supervision officer	Railway safety supervision officer; Accident prevention officer

<sup>25</sup> MLIT website, railway section <http://www.mlit.go.jp/tetudo/index.html>

<sup>26</sup> White Paper on Land, Infrastructure, Transport and Tourism in Japan, 2014

## b. Japan Railway Construction, Transport and Technology Agency (JRRT)

The Japan Railway Construction, Transport and Technology Agency (JRRT) is an independent administrative agency directly linked to MLIT. It was founded in 2003 after integration of the Japan Railway Construction Public Corporation and the Corporation for Advanced Transport & Technology. JRRT's purpose is to promote development of transportation systems by construction of railways and provision of subsidies to railway companies and also for coastal water transportation.<sup>27</sup> In 2016, it has a budget of approx. €8.8 billion, with close to 50% of its income generated by leasing of railway facilities to JR companies and private operators.<sup>28</sup>

JRRT focuses specifically on the further development of the Shinkansen network and urban railway networks in metropolitan areas. In case of funding of construction of new Shinkansen lines, the central government shoulders two-thirds of the costs and the local government takes care of the remaining one-third. Once it is completed the facilities owned by JRRT are leased to and operated by JR companies active in the region.

In metropolitan areas, JRRT is involved in the construction of connecting lines between existing networks to enhance user convenience and eliminate transfers. Towards the government owned JR companies for which it is the parent entity, JRRT provides financial assistance by provision of loans and subsidies and technical support for renewal and improvement of existing infrastructure.

JRRT also plays a role in promoting technological development and is as such involved in projects such as the development of the Chuo Maglev line, and new control systems. Combining a supervisory mandate and technological knowhow, JRRT also influences common standards and universal designs across both public and private railway operators.

As the Agency is a public organization, the commission of work is conducted by public tenders, however due to the application of the OSC, public procurement tenders conducted under internationally agreed WTO rules are scarce thus far.

JRRT is still quite influential with regard to the activities of the outer-island JR companies and smaller tier operators. According to insiders, for the privatized large JR companies and private operators, JRRT has substantially less clout.

## c. Local governments

Japan is divided into 47 administrative areas, often called '*to-do-fu-ken*', where *to* signifies the Tokyo Metropolitan Area, *do* the territory of Hokkaido in the North, *fu* the two metropolitan areas of Osaka and Kyoto and 43 *ken* which are the prefectures. In concert with the national government and the administrative entities within their areas, called *shi-cho-son* (Cities, towns and villages) they are responsible for setting local public transportation policies to meet local issues and needs in line with relevant laws and national policy priorities.

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<sup>27</sup> JRRT <http://www.jrnt.go.jp/11English/English-AboutJRNT.html>

<sup>28</sup> JRNT <http://www.jrnt.go.jp/05lr/pdf/investment.pdf> page 4

The larger cities such as Sapporo, Tokyo, Yokohama, Nagoya, Osaka, Kyoto, Kobe and Fukuoka have their own Bureaus of Transportation (*koutsuukyoku*) in charge of management and development of their public transportation networks, including subway systems, tram networks and bus-systems.

Beside regulatory mandates, regional and local governments also influence management and development of railway transportation by means of part ownership in third sector companies. (See appendix)

## d. Supervisory authorities

### Japan Transport Safety Board

The Japan Transport Safety Board<sup>29</sup> is the authority for establishing transportation safety, including railways. The Board is a division of the MLIT. Policymaking and regulation are therefore not separated in Japan, giving MLIT a large sway over the sector. At times of accidents, JTSB investigates the causes of accidents or incidents to prevent recurrence, and gives recommendations to parties involved concerning necessary measures. In 2015, it investigated 13 incidents, and for 2016 10 incidents are under investigation. Findings are published at the JTSB website. Having policy execution and supervision under one roof carries the risk of avoidance of responsibility in times of calamities, however the organisation has managed to execute its duties without much issues.

### Regional District Transport Bureaus

At the regional level, MLIT conducts guidance and supervision via its Regional District Transport Bureaus, covering 10 regions. (Hokkaido, Tohoku, Kanto, Hokuriku-Koshinetsu, Chubu, Kinki, Kobe, Chugoku, Shikoku and Kyushu).<sup>30</sup> The bureaus are in charge of supervision of activities, planning of new lines, surveys for maintenance and improvement of existing lines, inspection of trains, licenses for train machinists and assessment and promotion of safety measures in the region of their responsibility.

### Board of Audit

The Board of Audit is an independent organization that audits the accounts of the state, government affiliated organizations and other bodies that receive financial assistance from the State, including those in the railway sector.<sup>31</sup>

<sup>29</sup> <http://www.mlit.go.jp/jtsb/english.html>

<sup>30</sup> <http://www.mlit.go.jp/about/chihounyu.html>

<sup>31</sup> <http://www.jbaudit.go.jp/english/jbaudit/status.html>

## 6. Market Entry

Since the opening of its first train line in 1872, Japanese railways have developed in their own microcosm and after WWII involvement of foreign companies in the sector have been largely non-existent. As was said in the introductory paragraph, the sector has developed into a world-class industry, with very high safety records and high technological savvy showing Japanese engineering prowess and drawing admiration from all parts of the world.

In this relative isolation, the sector has been able to develop and set their own standards of quality and safety, which are in many aspects higher than those present in European countries.

Given the vast diversity in products and services and subsequently the large numbers of actors involved in the railway sector, there is of course not a singular approach to entering the Japanese railway market. As we have seen, the larger railway operators work in a vertically integrated structure, where they own their rolling stock as well as the infrastructure on which they operate. On the whole they operate in geographically separated areas and compete primarily in terms of best practice and consumer expectations.<sup>32</sup> To perform their tasks and delivery of services, Japanese railway operators work with companies within their group or with companies with whom they have had stable working relationships for decades. The latter explains why it is so difficult for new entrants to enter this market.

Another difficulty for European companies is that they have to deal with safety and quality standards, which are substantially different from European countries and a consumer body which is very demanding in these aspects. For companies to be successful in the Japanese market, in-depth knowledge of these aspects is vital for any success.

### a. Procurement practices

When looking at the procurement practices of Japanese railway operators, there are various modes of operation in play.

**Table 8: Types of procurement practices**

Operators	Type of procurement practices
Privatized JRs	Voluntary, publicly available procurement announcements, mixed with 'regular' negotiation-based business transactions
Public JRs, Tokyo Metro, Transportation Bureaus	Public procurement (Often limited by OSC)
Private operators (Including 3 <sup>rd</sup> sector companies)	'Regular' negotiation-based business transactions

### The big three: JR-EAST, JR-Tokai and JR-West

Part of the agreement between Japan and the EU to no longer regard the big JR companies as part of the WTO Agreement on Government Procurement was that the companies would 'voluntary' publish their prospective

<sup>32</sup> Japan-Sweden comparison, page 41

procurement plans publicly. All three companies currently possess designated websites in English outlining their procurement procedures and plans for procurement. It should of course be noted that the information published in English is substantially less than the information published in Japanese. In order to be considered as a supplier, an application process needs to be completed.

Table 9: JR English procurement websites

Operator	Procurement website (English)
JR East	<a href="http://www.jreast.co.jp/e/data/procurement/">http://www.jreast.co.jp/e/data/procurement/</a>
JR Central	<a href="http://english.jr-central.co.jp/company/company/material_procurement/index.html">http://english.jr-central.co.jp/company/company/material_procurement/index.html</a>
JR West	<a href="http://www.westjr.co.jp/global/en/procurement/">http://www.westjr.co.jp/global/en/procurement/</a>

The publication of procurement plans to international audiences is however not only driven by political necessities, the companies also have ambitions to expand their activities outside of Japan, which in turn is also stimulated by the Abe-government’s ambitions to substantially increase Japan’s infrastructural exports in all parts of the world, including Europe.

Ambitions for this expansion have been most pronounced at JR East. During the past years it has set up branch offices abroad, including in Brussels and has been actively seeking to broaden its supplier base. Currently only 3% of its 1,500-odd suppliers are foreign. Since 2015, JR East Brussels Branch has organized annual supplier tours in Europe at various locations in Europe, with the 2<sup>nd</sup> round held in April of 2016.<sup>33</sup> With dozens of European companies attending these sessions, JR East has plans to organize another round in 2017.

JR Central has branch offices abroad, including one in London. The company has been active abroad in high-speed rail projects in countries such as Taiwan, where it is operating a line between Taipei and Kaohsiung and has been lobbying during the past years to export its Shinkansen technologies (in particular its L0 maglev train<sup>34</sup>) to the United States. Working in concert with Mitsubishi Heavy Industries and its own subsidiary Nippon Sharyo on the latter project, the company shows less explicit activities in internationalizing its supplier-base and as far as is known, has developed no concrete initiatives in Europe.

Of the large JRs, JR West is seen as the least internationally active railway company thus far.<sup>35</sup> Mainly serving the Western part of the main island it is likely to be most negatively affected by the ageing of the population and shift to the metropolitan areas, and the focus of its business activities remains firmly on the domestic market. Because of the particular challenges of the region it serves, the company is planning to pay more attention on its non-railway activities.<sup>36</sup> In terms of concrete international activities, JR West announced that it would invest in a city transport project in Brazil together with the Japan Overseas Infrastructure Investment Corporation for Transport and Urban

<sup>33</sup> <http://www.jreast.co.jp/e/data/procurement/pdf/invitation20160226.pdf>

<sup>34</sup> <http://linear.jr-central.co.jp/about/l0.html> For English information check [https://en.wikipedia.org/wiki/L0\\_Series](https://en.wikipedia.org/wiki/L0_Series)

<sup>35</sup> Nikkei Online, July 7, 2016 <http://www.nikkei.com/article/DGXMZO04275460Q6A630C1000000/>

<sup>36</sup> <http://www.westjr.co.jp/global/en/ir/medium-term/>

Development (JOIN).<sup>37</sup> The company also participated for the first time in seminars for European suppliers, organized by JR East in the spring of 2016.<sup>38</sup>

Practically speaking, registration with the large JRs as a prospective supplier should be regarded as a first step, more as an expression of interest. Keeping in mind that all the companies have their in-house network of companies and a network of firmly established suppliers, the registration is the start of a sustained effort to build up a long-term business relationship.

## b. Government owned operators: Public JRs, Tokyo Metro, Transportation Bureaus

Publicly owned organizations are formally obliged to procure their goods and services in public procedures. In the paragraph on the Operational Safety Clause was already explained that the majority of railway related procurement by these organizations is not conducted under internationally agreed WTO regulations and also not all public organizations related to railways fall under the international government procurement agreement. As a result, there is relatively little information in English available concerning railway related tenders.

**Table 10: Procurement by public(ly owned) entities**

Operator	Materials Procurement
<i>Government owned</i>	
JR Hokkaido	Materials procurement via subsidiary HJR Corporation <sup>39</sup>
JR Shikoku	Registration required for access to online procurement system <sup>40</sup>
JR Kyushu	Registration required for access to online procurement system <sup>41</sup> , part of procurement conducted via subsidiary JR Kyushu Trading Co. Ltd. <sup>42</sup>
JR Freight	Procurement not publicly available, application needed <sup>43</sup>
Tokyo Metro	Registration necessary as supplier <sup>44</sup>
<i>Government run</i>	
Tokyo Transportation Bureau	Uses the TMG's common online procurement platform <sup>45</sup>
Osaka Municipal Transportation Bureau	Via online procurement platform <sup>46</sup>
Nagoya Transportation Bureau	Via online procurement platform <sup>47</sup>

<sup>37</sup> [http://www.nikkei.com/article/DGXLASDZ09I1P\\_Z01C15A2TJC000/](http://www.nikkei.com/article/DGXLASDZ09I1P_Z01C15A2TJC000/)

<sup>38</sup> <https://www.westjr.co.jp/global/en/procurement/pdf/invitation.pdf>

<sup>39</sup> <http://www.h-jrshoji.jp/>

<sup>40</sup> [http://www.jr-shikoku.co.jp/global/en/material/Material\\_Procurement\\_Information.pdf](http://www.jr-shikoku.co.jp/global/en/material/Material_Procurement_Information.pdf)

<sup>41</sup> <http://www.jrkyushu.co.jp/sizai/info.jsp>

<sup>42</sup> <http://www.jrk-shoji.co.jp/index.html>

<sup>43</sup> <http://www.jrfreight.co.jp/english/corporate/procurement.html>

<sup>44</sup> <http://www.tokyo metro.jp/en/corporate/procurement/index.html>

<sup>45</sup> <http://www.e-procurement.metro.tokyo.jp/index.jsp>

<sup>46</sup> <http://www.kotsu.city.osaka.lg.jp/business/contract/choutatsu.html>

<sup>47</sup> <http://www.city.nagoya.jp/jigyuu/category/43-0-0-0-0-0-0-0-0.html>

Government-owned organizations usually run designated websites for their procurement of goods and services. These are primarily in Japanese. The state-owned JR companies do not publish their procurement openly on their websites and only provide summary information.

Government run operators, such as the Transportation Bureaus conduct their procurement via their common procurement platforms in their cities. In order to be able to participate in tender procedures, suppliers will have to apply beforehand as a supplier with each government entity separately. In this application process, conducted entirely in Japanese, the government entity will make an assessment of capabilities of the prospective supplier and classify and rank them. For detailed information on this, can be found at the EU-Japan Centre's [eubusinessinjapan.eu](http://eubusinessinjapan.eu) platform, which includes a helpdesk service for public procurement in Japan.

### c. Private operators (Including 3<sup>rd</sup> sector companies)

Most private operators, including those in the 3<sup>rd</sup> sector will not publish their materials procurement online, let alone in English. There are some exceptions to this, such as [Kintetsu Railway Co. Ltd.](http://www.kintetsu-railway.co.jp) and railcar manufacturer [Kinki Sharyo Co. Ltd.](http://www.kinki-sharyo.co.jp) In these cases it is possible to make a direct pitch with your product. For other companies the standard business approaches will have to be used.

### d. Who to target?

The question is then what party to target. With the large railway operators, also possessing their own rolling stock and related railway infrastructure systems companies, it is difficult to assess what sales route would be the most effective. Moreover, it will also depend on the type of product or service that is on offer. It is therefore difficult to provide a golden rule for success.

What should be kept in mind is, that in terms of product development there is usually a close interaction between the customer (railway operator) and the supplier of the products. It is quite common that this interaction takes place on parts-level as well. In this aspect, it is different from EU railway networks, where the customer will focus more on product outcomes than technical intricacies. This interlocking aspect of the Japanese railway market can however have the advantage that opening a door with a railway provider can also open door to producers more easily.

Larger Japanese companies, with international ambitions have the advantage that they will have staff that have experience with dealing with foreign companies. Some, such as JR East are actively pursuing international suppliers with innovative and high quality products. A drawback of larger organizations is however, that it can be difficult to find the right entrance into often more bureaucratic organization.

With smaller companies, the reverse is true, where you might get in touch with the right decision makers more easily, but where it is more difficult to get past the front door in the first place.

In both cases, it is however important to keep the following in mind before approaching a prospective customer:

- Gather sufficient business intelligence about your prospect, and try to make an assessment to their openness to working with non-Japanese partners;



- Gain knowledge about the quality and safety standards and licenses that are required for your product or service.

## 7. Trends

### a. Planned expansions



Source: [Nippon.com](http://Nippon.com)

Planned expansions of the Japanese railways network are primarily occurring in the Shinkansen network and in the large urban areas. Construction of the Linear Chuo-line, the first commercial rail-line using Magnetic Levitation (Maglev) technology between Tokyo Shinagawa station and Nagoya is already underway and is expected to be completed around 2027. With top speeds up over 500 km/h a trip between Tokyo and Nagoya will then take 40 minutes. An extension to Osaka is currently in the planning phase and expected to be completed by 2045. This new line is not regarded as part of the backbone Shinkansen network spanning the Japanese islands. There is already an existing high speed rail line between the cities, and the line will therefore have to compete with the existing, relatively slower

Shinkansen line. JR TT has tested and developed the technologies during the past years at its Yamanashi Maglev Test Line.<sup>48</sup> The Japanese government and industry hope that this technology will become a major export product in the coming decades. The construction and subsequent management of the Chuo-line is entirely in the hands of JR Central, which was awarded the project by MLIT in 2011.<sup>49</sup> The company estimates that the construction costs will run up to €108 mln per kilometer.<sup>50</sup> The Japanese government is discussing plans to support JR Central financially with the Osaka extension.<sup>51</sup> Although JR Central is a private company, involvement of JR TT makes that part of the construction projects for the Linear Chuo line are internationally tendered under WTO rules.<sup>52</sup>

**Table 11: Linear Chuo-line fact sheet**

Length	285.6 km (86% tunnels, 8% viaducts, 4% bridges)
Stops*	6 (Cities: Shinagawa, <u>Sagamihara</u> , <u>Kofu</u> , <u>Iida</u> , <u>Nakatsugawa</u> , Nagoya)
Depots	2 (Cities: Sagamihara, Nakatsugawa)
Trains	LO Series (Nippon Sharyo. Ltd, Mitsubishi Heavy Industries)

\* Underlined denotes new stations

**Table 12: List of other major railway projects under construction or planned**

Project	Location	Length (km)	Constructor	Completed
Hokkaido Shinkansen	Hakodate-Sapporo	211	JR TT	2030
Hokuriku-Shinkansen	Kanazawa-Tsuruga	125	JR TT	2025
Kyushu-Shinkansen	Takeo Onsen - Nagasaki	66	JR TT	2022
Eastern Kanagawa connection lines	Connecting Sotetsu/JR and Sotetsu/Tokyu lines	12.7	JR TT	2018/2019
Keio line continuous grade separation	Sasazuka-Sengawa (Tokyo)	7.2	Keio	2022
Fukuoka city subway line extension <sup>53</sup>	Tenjin-minami - Hataka		Fukuoka city	2020
Keikyū Daishi Line continuous grade separation	Higashi-monzen – Kojimashinden		Kawasaki	2020
Yui monorail extension Okinawa <sup>54</sup>	Shuri- Uranishi	4.1	Okinawa Urban Monorail. Inc.	2019
JR Osaka Higashi line extension <sup>55</sup>	ShinOsaka - Hanaten	11.1	JR West	2019
Utsunomiya LRT <sup>56</sup>	Utsunomiya, Tochigi	15	Utsunomiya	2019
Renovation of large terminal stations <sup>57</sup>	Shinagawa, Shibuya, Tokyo Marunouchi,		JR-East	
Redevelopment of Shibuya station	Shibuya ward, Tokyo		JR-East	

<sup>48</sup> JR TT, Railway Construction Brochure <http://www.jrtt.go.jp/11English/English-RailConst.html> p. 8

<sup>49</sup> MLIT, 中央新幹線の営業主体及び建設主体の指名について May 5, 2011

[http://www.mlit.go.jp/report/press/tetsudo03\\_hh\\_000031.html](http://www.mlit.go.jp/report/press/tetsudo03_hh_000031.html)

<sup>50</sup> €1=¥130 JR Tokai press release <http://english.jr-central.co.jp/company/others/pdf/otherinformation-82.pdf>

<sup>51</sup> Nikkei, リニアに 3 兆円支援 鉄道網整備へ政府マネー拡大 June 6, 2016

<http://www.nikkei.com/article/DGXLZO03446830Q6A610C1EE8000/>

<sup>52</sup> Kensetsunews.com リニア工事が WTO 対象に/中央アルプス T など/鉄道・運輸機構 April 3, 2015

<sup>53</sup> [http://subway.city.fukuoka.lg.jp/nanakumaline\\_extension/](http://subway.city.fukuoka.lg.jp/nanakumaline_extension/)

<sup>54</sup> Nikkei Construction, <http://kenplatz.nikkeibp.co.jp/article/const/news/20150414/697897/>

<sup>55</sup> JR-West, Projects <http://www.westjr.co.jp/railroad/project/>

<sup>56</sup> Utsunomiya city. <http://www.city.utsunomiya.tochigi.jp/kotsu/shinkotsu/index.html>

<sup>57</sup> JR-East <https://www.jreast.co.jp/construction/>

## b. Cross-over into other sectors: diversification

The larger railway operators in particular are engaging in a wide range of activities, other than those directly related to the operation of transportation services. For example, JR East is earning close to one-third with non-transportation activities such as renting out space at stations, and real-estate development.<sup>58</sup> JR West newly appointed president announced in June 2016 that “non-transport business would become an important pillar for future growth.”<sup>59</sup> The trend is therefore that the larger operators in Japan are moving further beyond the confines of the stations that they operate and are playing an increasingly more important role in urban development surrounding their stations, such as hotels and shopping malls.

## c. Overseas expansion

In the discussion of the three large privatised JRs, their international ambitions were already discussed briefly. The Abe-government has export of Japanese infrastructural technology and know-how as one of the priority areas, as it aims to increase exports to 30 trillion yen by 2020. This is not limited to railways only, but also includes largescale construction projects and nuclear technologies.

When described in maritime terms, the approach can be seen as a kind of Japanese convoy, with the prime-minister as the self-appointed admiral, leading a flotilla of battleships, which cooperate in changing combinations. In particular, in developing countries, the government supports the endeavours of the companies with tied low- or no-interest loans. The approach is having mixed results, with a Japanese railway consortium losing in Indonesia to the Chinese in their battle to win a project for the construction of a high-speed railway on Java in 2015. There however are recent reports that Indonesia again will ask Japan to contribute.<sup>60</sup> Although the focus of the flotilla’s activities is on securing projects in developing countries, they also have Europe and the US in their sights. This is a mode of export promotion that is less visible in EU countries, where coordination of between government and large companies as substantially less visible.

Japanese companies in the railway sector therefore operate in a business environment where overseas expansion is actively supported, and this might also pose business opportunities for smaller European companies active in the sector in terms of cooperation or investments. Presently, among the large operators, JR East seems to be most explicitly active in Europe, seeking to expand its supplier base there. The success by Hitachi in securing a project in the UK was already mentioned, and it recently won another project to build commuter trains for Italy’s rail network.<sup>61</sup> The

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<sup>58</sup> JR East company presentation.

<sup>59</sup> Nikkei, JR 西日本、新社長が投じる低金利資金の行方 July 1<sup>st</sup>, 2017  
<http://www.nikkei.com/article/DGXMZO04275460Q6A630C1000000/>

<sup>60</sup> Nikkei Online, <http://asia.nikkei.com/Politics-Economy/International-Relations/Indonesia-to-ask-Japan-to-build-trans-Java-railway> May 25, 2016

<sup>61</sup> Nikkei Asian Review, Hitachi to build commuter trains for Italy's rail network June 30, 2016

<http://asia.nikkei.com/Business/Companies/Hitachi-to-build-commuter-trains-for-Italy-s-rail-network>

latter follows Hitachi's earlier acquisition of AnsaldoBreda (Now Hitachi Italy) from Italy's Finmeccanica last year, where it also plans to build train cars for the UK market.<sup>62</sup>

Similar to Hitachi, other large rolling stock manufacturers such as multinationals [Kawasaki Heavy Industries](#) and [Mitsubishi Heavy Industries](#) already possess broad transportation-related portfolios. More specialized manufacturers, mostly operating in the shadow of, or in concert with, their larger parent companies have thus far shown less ambitions. For now, it seems that among the large railway operators, the fully privatized JRs have the largest ambitions. Among second tier operators there are less ambitions visible thus far.

#### d. Privatization

In the Fall of 2016, the Japanese government will for the first time in almost 25 years bring a JR company to the stock market, with the announcement of the initial public offering (IPO) of JR Kyushu.<sup>63</sup> Together with JR Hokkaido and JR Shikoku, the companies have seen little profit since JR was split up in 1987. However, it seems that JR Kyushu business prospect have improved sufficiently to warrant an IPO. For the remaining two JRs, which also operate many loss-making lines in the periphery an IPO is currently not in the books.<sup>64</sup>

#### e. Urban transportation improvement: LRT

Beside the improvements to the existing transportation networks in urban areas through extensions and new connections, MLIT is also promoting other urban transportation systems such as Light Rail Transportation (LRT) systems. This is driven by motives such as revitalization of city centers, improvement of the environmental conditions in cities and to shorten the 'last mile' for a population that is growing older rapidly.<sup>65</sup> 19 Japanese cities currently have LRT systems in operation.

A number of regional cities are presently looking into the development of LRT systems in their cities. The most concrete project at the moment is the LRT construction in Utsunomiya, Tochigi. Construction of the LRT, stretching over 18 km, is projected to start this year and expected to be completed in 2019. The city has the highest rate of automobile ownership in the country, which is still rising, and results in heavy congestion due to commuters. Anticipating on a decrease in the population, the government strives towards the creation of a 'network type compact city'.<sup>66</sup> Other cities considering the introduction of LRT systems seem to be still in the proposal or planning stages.<sup>67</sup>

<sup>62</sup> Hitachi completes Ansaldo deal, 2015, Nov. 2 <http://www.railwaygazette.com/news/business/single-view/view/hitachi-completes-ansaldo-deal.html> Nikkei, 日立ブランドで鉄道車両生産 買収先イタリア企業で September 6, 2015 [http://www.nikkei.com/article/DGXLASDZ05H01\\_V00C15A9TJC000/](http://www.nikkei.com/article/DGXLASDZ05H01_V00C15A9TJC000/)

<sup>63</sup> <http://asia.nikkei.com/Markets/Tokyo-Market/JR-Kyushu-emerges-as-another-giant-Tokyo-IPO>

<sup>64</sup> [http://www.jbaudit.go.jp/pr/kensa/result/28/pdf/280217\\_youshi\\_02.pdf](http://www.jbaudit.go.jp/pr/kensa/result/28/pdf/280217_youshi_02.pdf)

<sup>65</sup> MLIT, [http://www.mlit.go.jp/toshi/toshi\\_gairo\\_tk\\_000047.html](http://www.mlit.go.jp/toshi/toshi_gairo_tk_000047.html)

<sup>66</sup> Presentation by Utsunomiya Official at Japan-EU Railway Industrial Dialogue, November 10, 2015

<sup>67</sup> [Daily Engineering and Constuction News](#), 東京都 / 鉄道新設・延伸具体化へ課題検討 / L R T ・ B R T 導入可能性を精査 (Tokyo to investigate issues regarding construction and extending of railways/ Detailed survey of possibilities to introduce LRT/BRT (April 27, 2016)

Table 13: Cities with LRT systems

Prefecture	City (Line)	Public/Private
Hokkaido	Sapporo	Public
	Hakodate	
Tokyo	Tokyo (Arakawa line)	Public
	Tokyo (Tokyu Setagaya line)	Private
Toyama	Toyama (Chiho testudo)	Private
	Toyama (Lite rail)	3 <sup>rd</sup> sector
	Takaoka-Imizu	3 <sup>rd</sup> sector
Aichi	Toyohashi	Private
Fukui	Fukui	Private
Kyoto, Shiga	Kyoto, Otsu (Keihan-line)	Private
Kyoto	Kyoto	Private
Osaka	Osaka (Hankai line)	Private
Okayama	Okayama	Private
Hiroshima	Hiroshima	Private
Kochi	Koichi	Public
Ehime	Matsuyama	Private
Nagasaki	Nagasaki	Private
Kumamoto	Kumamoto	Public
Kagoshima	Kagoshima	Public

## 8. Summarizing SWOT Analysis Japanese Railway Market Entry

### a. Strengths

#### World-class engineering technologies

The Japanese railway market has given birth to a number of world-class technologies, which are admired all over the world and which have found markets abroad. This development took place largely in an all-Japanese environment. Foreign entrants, including large European infrastructural companies such as Alstom and Siemens, have found it difficult to secure a successful business case, due to strong, established ties between government and the private sector and within the sector itself.

#### Highly sophisticated network

In close coordination between the public and the private sector, Japan has succeeded in creating a highly sophisticated network, consisting of a wide variety of transportation systems, with an unparalleled safety and punctuality record.

For new entrants into the market, meeting the existing standards of safety and quality will have to be regarded as a given.

### Demanding consumers

Japanese consumers expect levels of service that are most likely higher than those expected by consumers in Europe, where in many parts a sense of resignation seems to exist with regard to service delays and congestions. Japanese operators do not compete in terms of concessions and price, but operate their own network, with a strong eye on customer satisfaction and high service levels. Driving this is the knowledge that failure in providing the appropriate level of service can have large personal consequences for those deemed responsible (Public embarrassment).

### Close coordination between government and private sector

Japan has had a long tradition of government-led coordination of strategic industries, which was seen by many observers as one of the forces driving Japan's economic growth in the previous century. Although the effects of this seem to have waned in the past 20 years, with prolonged economic stagnation, the Japanese government still is a strong coordinating force in its industries by influencing standards and managing and coordinating resources.

## b. Weaknesses

### Inward-looking tendencies (Galapagos effect) of all actors

“Galapagos effect” is a business term often used by the Japanese themselves, and is used to describe the phenomenon, where remarkable progress is optimization of a business or product is made in an isolated environment (the Japanese domestic market), while the rest of the world moves into an entirely different direction. It is often being linked to the Japanese island mentality. Practically, it tends to leads to business networks, that tend to be looking inwards and less open and tolerant towards people, products and services that offer a different perspective. This mind-set can be particularly strong in smaller companies, where few people have direct experience collaboration with non-Japanese, and do not have the business and language skills to deal with foreign counterparts.

### Domestically isolated supplier networks hampering innovation

Linked to the above, smaller companies within the supply networks of large railway operators and rolling-stock often have a strong domestic outlook, as they are closely tied to their larger mother companies and clients. Foreign companies offering highly technical services, products and parts then face the challenge that they will find it difficult to manoeuvre into a position beyond the larger, more internationally oriented, but perhaps less technically knowledgeable, companies and strike up a direct innovation-driven cooperation with smaller supplier companies. The Japanese government is aware of this deficiency among Japanese SMEs, and has in recent years supported the international activities of SMEs more actively.<sup>68</sup>

<sup>68</sup> Small and Medium Enterprise Agency <http://www.chusho.meti.go.jp/keiei/kokusai/>

## c. Opportunities

### Ambitions for foreign expansion

Japan's ambitions to increase infrastructural exports, including those in railways, significantly in the coming years, might offer opportunities for European companies in the sector. The M&A activities of Hitachi in Italy and the recent acquisition of British railway systems provider ADComms by Panasonic are an examples of this.<sup>69</sup> Growing activities of Japanese companies in Europe, will require them to gain more local expertise, and with the railway sector necessitating a high degree of localization, new opportunities for cooperation will arise, and might in turn lead to opportunities in Japan as well. In addition, the increased activities by the larger JR companies to broaden they supplier-base are another sign that better opportunities in the Japanese railway market lie ahead.

### Ageing society

The issue of the rapidly ageing of the Japanese population was mentioned numerous times in this report. Together with the further concentration of the population in large urban areas, it is one of the most influential factors shaping the Japanese social infrastructure including the railway market in the years to come. With more people living longer and with physical impairments using transportation services, a decrease in available personnel and maintaining transportation services in ageing depopulated areas ask for innovative approaches on transportation.

### Ageing infrastructure - Cost-efficient solutions

Much of the existing railway infrastructure was constructed during the era of rapid economic growth in Japan, over 50 years ago. In combination with lower government budgets and decreasing incomes from transportation fees in regional areas, cost-efficient solutions are likely to find a more receptive audience in Japan.

## d. Threats

### Population decrease

While ageing of the population on the one hand can be regarded as a business opportunity, in the long term it should also be regarded as a threat. The majority of the smaller local railway operators is already loss-making and can only be maintained with generous government support. Even the larger operators in the periphery, such as JR Shikoku and JR Hokkaido have to deal with a negative business outlook, as the decrease in population is more pronounced there and the economic pressure to close loss-making lines will become more imminent.

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<sup>69</sup> Nikkei Asian Review, "UK acquisition is Panasonic's ticket to railway systems", September 2, 2016 <http://asia.nikkei.com/Business/Deals/UK-acquisition-is-Panasonic-s-ticket-to-railway-systems>

## Financial difficulties of smaller operators

With passenger numbers decreasing and ageing infrastructure in need of repair, smaller operators face an uphill battle to maintain their services. With many in need of government support, their survival will increasingly depend on political motivations, instead of business motivations. With little tradition in offering railway services in concessions, and allowing the larger railways to drop loss-making lines into the government's lap, Japan will most likely see increased consolidation and closing of train-lines in the coming years and a smaller market.

## Ambiguous local standards

Railway sectors in countries around the world have mostly developed their own set of standards. Even in regions with close-knit networks such as Europe, crossing a national border still often means entirely different standards and modes of operation. For European companies striving to enter the Japanese market, the standards applied there have been difficult to grasp, due to the complex underlying regulatory framework that exists, along with national/regional political motives.

## Political sensitivities – Unpredictable political climate

Japan has known a very stable political/administrative climate in the last 50 years, however infrastructural imports or foreign involvement in sectors such as transportation have mostly been treated with reservation. Despite years of efforts to secure large-scale projects in Japan, large foreign railway infrastructure companies, with global track records have been unable to make inroads into the Japanese market. It is difficult to pinpoint their lack of success, whether it is insufficient quality, unwillingness to localize, bureaucratic hurdles or just an inward-looking attitude of decision makers. When it concerns public services, there have been instances, where non-economic motives lead to the breakdown of business deals, such as for example the attempt by a US company to buy the Semboku line in Osaka. While the company had outbid its Japanese rivals, local politics blocked the deal, ending up in the withdrawal of the foreign bidder.<sup>70</sup> This shows that although the national government might be actively trying to attract foreign investments, the mind-set at the local level is still much less open to participation of foreign investors in the country's infrastructure.

## 9. European companies active in the Japanese railway sector

The above however does not mean that there are no European companies active in the Japanese railway sector. Although they have not been very successful in providing complete transportation systems, a number of companies have been able to secure business in Japan, which are often quoted by Japanese officials when they have to defend

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<sup>70</sup> Nikkei Asian Review, "How accepting is Japan of international investors buying into public infrastructure?" May 14, 2014  
<http://asia.nikkei.com/Politics-Economy/Economy/How-accepting-is-Japan-of-international-investors-buying-into-public-infrastructure>



themselves against allegations that their market is closed. Below is a (non-exhaustive) list of products that were sourced from European manufacturers.

**Table 14: EU companies active in Japanese railways sector**

Company	Products procured
JR East (63 foreign suppliers) <sup>71</sup>	Brake lining, Foundation brake rigging, compressors (Knorr-Bremse), engines, CBTC signalling system (Thales, France) <sup>72</sup>
JR Central	Track maintenance vehicle (Austria), pumps (Germany), weather forecasting systems (Finnish)
JR West	Imaging equipment (MERMEC, Italy)

## 10. Conclusion & Recommendations

This report has tried to give an overview of a sector that is very diverse, with companies active in a broad range of business activities. The Japanese railway market is a mature, highly sophisticated business sector, characterized by strong cross-links between the various actors, such as railway service providers, rolling stock producers and policy-makers.

These cross-links and well-established supply networks make it difficult for new entrants to secure an economically viable piece of the pie. Companies entering the market will therefore need to be aware of this, often exclusionary, network when devising their business strategy and take into account that more immediate profit considerations will often not have precedence.

The government policy to stimulate social infrastructure producers to spread their wings beyond the Japanese shores, will mean that the sector will also need to move into the direction of more internationally accepted practices and standards. Their need for local expertise and technologies can offer a door into the Japanese market itself, which is already visible in the pursuit of larger railway companies to diversify their supply chains.

The fact that larger railway companies are opening their doors to foreign companies with high quality products makes it perhaps easier to pursue business opportunities in the market. Still, the market will remain very challenging and entering it will be a process which requires a substantial amount of patience and tenacity in order to secure successful business relationships. Above was already mentioned the importance of:

- Gathering sufficient business intelligence about your prospects;
- making an assessment of their openness to working with non-Japanese partners;
- Gaining knowledge about the quality and safety standards and licenses that are required for your product or service.

In addition to these, a willingness to localize and an understanding of prevailing business culture in Japan (and securing Japanese language capability) are a given.

<sup>71</sup> JR East presentation at Japan-EU Railway Industry Dialogue, November 15, 2015

<sup>72</sup> See also, JR East, Major Track Records of JR East's Procurement from Overseas Suppliers

<https://www.jreast.co.jp/e/data/procurement/trackrecords.html>

## 11. Appendices

### a. List of railway operators in Japan

<b>JR Hokkaido</b> (北海道旅客鉄道)	
Regular Operator, JR	Ownership: Public
URL <a href="http://www.jrhokkaido.co.jp/">http://www.jrhokkaido.co.jp/</a>	
Procurement: Japanese <a href="http://www.h-jrshoji.jp/">http://www.h-jrshoji.jp/</a> English: not available	
Address: Higashi-ku Kita 6 jo Highashi 4-1-4 NE6-4 Bldg 4F 060-0906 Sapporo Hokkaido	
JR Hokkaido procures materials via JR Shoji Co. Ltd.	
<b>East Japan Railway Company</b> (東日本旅客鉄道)	
Regular Operator, JR	Ownership: Private
URL <a href="http://www.jreast.co.jp/">http://www.jreast.co.jp/</a>	
Procurement: Japanese <a href="http://www.jreast.co.jp/order/procurement/">http://www.jreast.co.jp/order/procurement/</a> English: <a href="http://www.jreast.co.jp/e/data/procurement/">http://www.jreast.co.jp/e/data/procurement/</a>	
Address: 2-2-2 Yoyogi, Shibuya-ku, Tokyo Tokyo	
<b>Central Japan Railway Company</b> (東海旅客鉄道株式会社)	
Regular Operator, JR	Ownership: Private
URL <a href="http://jr-central.co.jp/">http://jr-central.co.jp/</a>	
Procurement: Japanese <a href="http://company.jr-central.co.jp/company/material_procurement/index.html">http://company.jr-central.co.jp/company/material_procurement/index.html</a> English: <a href="http://english.jr-central.co.jp/company/company/material_procurement/index.html">http://english.jr-central.co.jp/company/company/material_procurement/index.html</a>	
Address: JR Central Towers, 1-1-4, Meieki, Nakamura-ku 450-6101 Nagoya Aichi	
<b>West Japan Railway Company</b> (西日本旅客鉄道株式会社)	
Regular Operator, JR	Ownership: Private
URL <a href="http://www.westjr.co.jp/">http://www.westjr.co.jp/</a>	
Procurement: Japanese <a href="http://www.westjr.co.jp/company/business/material/">http://www.westjr.co.jp/company/business/material/</a> English: <a href="http://www.westjr.co.jp/global/en/procurement/">http://www.westjr.co.jp/global/en/procurement/</a>	
Address: 2-4-24, Shibata, Kita-ku 530-8341 Osaka Osaka	
<b>Shikoku Railway Company</b> (四国旅客鉄道株式会社)	
Regular Operator, JR	Ownership: Public
URL <a href="http://www.jr-shikoku.co.jp/">http://www.jr-shikoku.co.jp/</a>	
Procurement: Japanese <a href="http://www.jr-shikoku.co.jp/04_company/shizai/">http://www.jr-shikoku.co.jp/04_company/shizai/</a> English: <a href="http://www.jr-shikoku.co.jp/global/en/material/Material_Procurement_Information.pdf">http://www.jr-shikoku.co.jp/global/en/material/Material_Procurement_Information.pdf</a>	
Address: Hamanomachi 8-33 760-8580 Hamamatsu Kagawa	
<b>Kyushu Railway Company</b> (九州旅客鉄道株式会社)	

Regular Operator, JR	Ownership: Public
URL <a href="http://www.jrkyushu.co.jp/">http://www.jrkyushu.co.jp/</a>	
Procurement: Japanese <a href="http://www.jrkyushu.co.jp/sizai/index.jsp">http://www.jrkyushu.co.jp/sizai/index.jsp</a> ; <a href="http://www.jrk-shoji.co.jp/">http://www.jrk-shoji.co.jp/</a> English: N.A.	
Address: 3-25-21 Hakata-ekimae, Hakata-ku 812-8566 Fukuoka Fukuoka	
JR Kyushu procures via JR Kyushu Trading	
<b>Japan Freight Railway Company</b> (日本貨物鉄道株式会社)	
Regular Operator, Cargo railway	Ownership: Public
URL <a href="http://www.jrfreight.co.jp/">http://www.jrfreight.co.jp/</a>	
Procurement: Japanese <a href="http://www.jrfreight.co.jp/about/other/procurement.html">http://www.jrfreight.co.jp/about/other/procurement.html</a> English: <a href="http://www.jrfreight.co.jp/english/corporate/procurement.html">http://www.jrfreight.co.jp/english/corporate/procurement.html</a>	
Address: 5-33-8 Sendagaya, Shibuya-ku Tokyo Tokyo	
<b>TOBU Railway CO., LTD.</b> (東武鉄道株式会社)	
Regular Operator, Large private	Ownership: Private
URL <a href="http://www.tobu.co.jp/">www.tobu.co.jp/</a>	
Procurement: Japanese English:	
Address:	
Purchased traincars from Kinki Sharyo <a href="http://www.kinkisharyo.co.jp/ja/news/news150617.htm">http://www.kinkisharyo.co.jp/ja/news/news150617.htm</a>	
<b>Keisei Electric Railway Co., Ltd</b> (京成電鉄株式会社)	
Regular Operator, Large private	Ownership: Private
URL <a href="http://www.keisei.co.jp">www.keisei.co.jp</a>	
Procurement: Japanese English:	
Address: Yawata 3-3-1 272-850 Ishikawa Chiba	
<b>SEIBU RAILWAY Co.,Ltd</b> (西武鉄道株式会社)	
Regular Operator, Large private	Ownership: Private
URL <a href="http://www.seibu-group.co.jp/railways/">http://www.seibu-group.co.jp/railways/</a>	
Procurement: Japanese English:	
Address: Kusunokidai 1-11-1, 359-8520 Tokorozawa Saitama	
<b>Keio Corporation</b> (京王電鉄株式会社)	
Regular Operator, Large private	Ownership: Private
URL <a href="http://www.keio.co.jp">www.keio.co.jp</a>	
Procurement: Japanese English:	
Address: Sekido 1-9-1 206-8502 Tama Tokyo	

<b>Mitake Tozan Railway Co.,Ltd</b> (御岳登山鉄道株式会社)	
Cable-car operator,	Ownership: Private
URL <a href="http://www.mitaketozan.co.jp/">http://www.mitaketozan.co.jp/</a>	
Procurement: Japanese English:	
Address: Mitake 2-483 198-0174 Oume Tokyo	
Subsidiary of Keio, cable car company	
<b>Odakyu Electric Railway Co., Ltd.</b> (小田急電鉄株式会社)	
Regular Operator, Large private	Ownership: Private
URL <a href="http://www.odakyu.jp/">www.odakyu.jp/</a>	
Procurement: Japanese English:	
Address: Nishi Shinjuku 1-8-2 Odakyu Meiji Yasuda Seimei Bldg 160-8309 Shinjuku Tokyo	
<b>Enoshima Electric Railway Company, Limited.</b> (江ノ島電鉄株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.enoden.co.jp/">http://www.enoden.co.jp/</a>	
Procurement: Japanese English:	
Address: Katasekaigan 1-8-16 251-0035 Fujizawa Kanagawa	
Company is majority owned by Odakyu Group	
<b>Hakone Tozan Railway Co., Ltd.</b> (箱根登山鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.hakone-tozan.co.jp/">http://www.hakone-tozan.co.jp/</a>	
Procurement: Japanese English:	
Address: Shiroyama 1-15-1 250-0045 Odawara Kanagawa	
Company is a full subsidiary of Odakyu Group	
<b>Oyama Kanko Dentetsu Co.,Ltd.</b> (大山観光電鉄株式会社)	
Cable-car operator,	Ownership: Private
URL <a href="http://www.ooyama-cable.co.jp/">http://www.ooyama-cable.co.jp/</a>	
Procurement: Japanese English:	
Address: Oyama 667 259-1107 Isehara Kanagawa	
Minority stake by Odakyu	
<b>Tokyu Corporation</b> (東京急行電鉄株式会社)	
Regular Operator, Large private	Ownership: Private
URL <a href="http://www.tokyu.co.jp">www.tokyu.co.jp</a>	
Procurement: Japanese English:	
Address: Nanpei Daichou 5-6 150-8511 Shibuya Tokyo	
<b>Keikyu Corporation</b> (京浜急行電鉄株式会社)	
Regular Operator, Large private	Ownership: Private
URL <a href="http://www.keikyu.co.jp/">http://www.keikyu.co.jp/</a>	
Procurement: Japanese English:	

Address: Minato-ku Takanawa 2-20-20 108-8625 Tokyo Tokyo	
<b>Tokyo Metro Co., Ltd.</b> (東京地下鉄株式会社)	
Regular Operator, Large private	Ownership: Public
URL <a href="http://www.tokyometro.jp">www.tokyometro.jp</a>	
Procurement: Japanese	
<a href="http://www.tokyometro.jp/corporate/business/index.html">http://www.tokyometro.jp/corporate/business/index.html</a> English: <a href="http://www.tokyometro.jp/en/corporate/procurement/index.html">http://www.tokyometro.jp/en/corporate/procurement/index.html</a>	
Address: 3-19-6, Higashi-ueno, Taito-ku Tokyo Tokyo	
<b>Sagami Railway Co. Ltd. (Sotetsu)</b> (相模鉄道株式会社)	
Regular Operator, Large private	Ownership: Private
URL <a href="http://www.sotetsu.co.jp/">http://www.sotetsu.co.jp/</a>	
Procurement: Japanese English:	
Address: 2-9-14 Kitasaiwai Nishiku 220-0004 Yokohama Kanagawa	
<b>Nagoya Railroad Co.,Ltd. (Meitetsu)</b> (名古屋鉄道株式会社)	
Regular Operator, Large private	Ownership: Private
URL <a href="http://www.meitetsu.co.jp/">http://www.meitetsu.co.jp/</a>	
Procurement: Japanese English:	
Address: 1-2-4 Meieki Nakamura-ku 450-8501 Nagoya Aichi	
<b>Toyohashi Railroad Co., Ltd.</b> (豊橋鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.toyotetsu.com/">www.toyotetsu.com/</a>	
Procurement: Japanese English:	
Address: 1-46-1 Toyotetsu terminal Bldg 5F Ekimae Oodori 440-0888 Toyohashi Aichi	
Subsidiary of Nagoya Railroad Co.,Ltd. (Meitetsu)	
<b>Hokuriku Railroad Co.,Ltd.</b> (北陸鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.hokutetsu.co.jp/">http://www.hokutetsu.co.jp/</a>	
Procurement: Japanese English:	
Address: 556 Waridashimachi 920-8508 Kanazawa Ishikawa	
Operator of two lines from Kanazawa city, largest stockholder is Nagoya Railway Corp (Meitetsu)	
<b>Kintetsu Corporation</b> (近畿日本鉄道株式会社)	
Regular Operator, Large private	Ownership: Private
URL <a href="http://www.kintetsu.jp">www.kintetsu.jp</a>	
Procurement: Japanese <a href="http://www.kintetsu.jp/shizaichotatsu/">http://www.kintetsu.jp/shizaichotatsu/</a> English:	
Address: 6-1-55 Uehonmachi Tennoji 543-8585 Osaka Osaka	

<b>Nara Ikoma Rapid Transit Railway Co., Ltd.</b> (奈良生駒高速鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.nirr.co.jp/index2.html">http://www.nirr.co.jp/index2.html</a>	
Procurement: Japanese English:	
Address: 10-40 Kita-Shinmachi Ikoma Nara	
Public/Private entity with 50% owned by public sector, Kintetsu Group Holdings Co., Ltd. Is their largest private stockowner	
<b>Iga Railway Co., Ltd.</b> (伊賀鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private
URL <a href="http://www.igatetsu.co.jp/">www.igatetsu.co.jp/</a>	
Procurement: Japanese English:	
Address: 61-2 Ueno Marunouchi Iga Mie	
Operator of one line in Iga city, private majority stockholder 98% owned by Kintetsu Group Holdings Co., Ltd.	
<b>Yoro Railway Co., Ltd.</b> (養老鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.yororailway.co.jp/">www.yororailway.co.jp/</a>	
Procurement: Japanese English:	
Address: 910 Kidomachi 503-0973 Ogaki Gifu	
Subsidiary of Kintetsu Group Holdings Co., Ltd.	
<b>Yokkaichi Asunarou Railway Co.,Ltd.</b> (四日市あすなろ鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private
URL <a href="http://www.yar.co.jp/">http://www.yar.co.jp/</a>	
Procurement: Japanese English:	
Address: 1-1-60 Yasushima 510-0075 Yokkaichi Mie	
75% owned by Kintetsu Group Holdings Co., Ltd., 25% by Yokkaichi city	
<b>Keihan Electric Railway Co., Ltd.</b> (京阪電気鉄道株式会社)	
Regular Operator, Large private	Ownership: Private
URL <a href="http://www.keihan.co.jp">www.keihan.co.jp</a>	
Procurement: Japanese English:	
Address: 1-7-32 OMM Bldg. Otemae Chuo-ku 540-6591 Osaka Osaka	
Most of traincars are delivered by Kawasaki Heavy Industries. Control and electrical systems are mostly provided by Toyo Denki Seizo	
<b>Keifuku Electric Railroad Co., Ltd.</b> (京福電気鉄道株式会社)	
Tram operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.keifuku.co.jp/">www.keifuku.co.jp/</a>	
Procurement: Japanese English:	
Address: 3-20 Mibukayogoshochō, Nakagyō 604-8811 Kyoto Kyoto	
Kyoto-based Tram company 43% owned by Keihan Electric Railway	
<b>Eizan Electric Railway Co., Ltd.</b> (叡山電鉄株式会社)	

Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="https://eizandensha.co.jp">https://eizandensha.co.jp</a>	
Procurement: Japanese English:	
Address: 8-80 Yamabana Itchodacho, Sakyo Ward 606-8007 Kyoto Kyoto	
Wholly owned by	
<b>Hieizan Railway Co.,Ltd.</b> (比叡山鉄道株式会社)	
Cable-car operator,	Ownership: Private
URL <a href="http://www.sakamoto-cable.jp/">http://www.sakamoto-cable.jp/</a>	
Procurement: Japanese English:	
Address:	
Cable car company owned by Keihan Holdings Co., Ltd.	
<b>Nakanoshima Rapid Railway Co., Ltd.</b> (中之島高速鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.nrr.co.jp/">http://www.nrr.co.jp/</a>	
Procurement: Japanese English:	
Address: 1-7-31 Otemae Chuo-ward 540-6591 Osaka Osaka	
Company set up for construction and maintenance of the Nakanoshima line. Joint investment by Keihan, Osaka city and Osaka Prefecture	
<b>Hankyu Corporation</b> (阪急電鉄株式会社)	
Regular Operator, Large private	Ownership: Private
URL <a href="http://www.hankyu.co.jp/">http://www.hankyu.co.jp/</a>	
Procurement: Japanese English:	
Address: 1-1 Sakaemachi 530-8389 Ikeda Osaka	
<b>Hanshin Electric Railway Co.,Ltd.</b> (阪神電気鉄道株式会社)	
Regular Operator, Large private	Ownership: Private
URL <a href="http://www.hanshin.co.jp/">http://www.hanshin.co.jp/</a>	
Procurement: Japanese English:	
Address: Ebie, Fukushima Ward 553-8553 Osaka Osaka	
<b>Hokushinkyuko Railway Co., Ltd</b> (北神急行電鉄株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.hokushinkyuko.co.jp/">http://www.hokushinkyuko.co.jp/</a>	
Procurement: Japanese English:	
Address: 27 Ōhashi Yamadachō Shimotanigami, Kita-ku, 651-1243 Kobe Hyogo	
Partly owned by Hankyu and Kobe railways	
<b>KOBE Rapid Transit Railway Company, Limited</b> (神戸高速鉄道株式会社)	
Regular Operator, Second tier	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.kobe-kousoku.jp/">http://www.kobe-kousoku.jp/</a>	
Procurement: Japanese English:	

Address: 3-9 Tamondori, Chuo ward 650-0015 Kobe Hyogo	
KITA-OSAKA KYUKO RAILWAY Company, Limited (北大阪急行電鉄株式会社)	
Regular Operator, Second tier	Ownership: Private
URL <a href="http://www.kita-kyu.co.jp/">http://www.kita-kyu.co.jp/</a>	
Procurement: Japanese English:	
Address: Terauchi 2-4-1 561-0872 Toyonaka Osaka	
Majority owned by Hankyu Corp. with 20% stake by Osaka Prefecture	
Nishiosaka Railway Co., Ltd. (西大阪高速鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.nishiosaka-railway.co.jp/">www.nishiosaka-railway.co.jp/</a>	
Procurement: Japanese English:	
Address: 1-1-24 Ebie Fukushima-ku 553-8553 Osaka Osaka	
Company set up for construction and maintenance of the extension of the Hanshin Nanba line to Kintestu Namba line. Owned by Hanshin, Osaka city and Osaka Prefecture	
Kobe Electric Railway Co., Ltd. (神戸電鉄株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.shintetsu.co.jp/">http://www.shintetsu.co.jp/</a>	
Procurement: Japanese English:	
Address: 1-3-24 Shinkaichi Hyogo-ku 652-0811 Kobe Hyogo	
27% share by Hankyu-Hanshin	
Sanyo Electric Railway Co., Ltd. (山陽電気鉄道株式会社)	
Regular Operator, Second tier	Ownership: Private
URL <a href="http://www.sanyo-railway.co.jp/">http://www.sanyo-railway.co.jp/</a>	
Procurement: Japanese English:	
Address: 3-1-10yashikidori, Nagata Ward 653-0843 Kobe Hyogo	
17.38% stake by Hanshin Electric Railways	
Nose Electric Railway Co., Ltd. (能勢電鉄株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://noseden.hankyu.co.jp">http://noseden.hankyu.co.jp</a>	
Procurement: Japanese English:	
Address:	
98.5% share by Hankyu Electric Railways	
Nankai Electric Railway Co., Ltd. (南海電気鉄道株式会社)	
Regular Operator, Large private	Ownership: Private
URL <a href="http://www.nankai.co.jp/">http://www.nankai.co.jp/</a>	
Procurement: Japanese English:	
Address: 1-1-41 Shikitsu Higashi, Naniwa Ward 556-8503 Osaka Osaka	
Semboku Rapid Railway Co., Ltd.	

(泉北高速鉄道株式会社)	
Regular Operator, Second tier	Ownership: Private
URL <a href="http://www.semboku.jp/">http://www.semboku.jp/</a>	
Procurement: Japanese English:	
Address: 5-1-1 Ibukino 594-0041 Izumi Osaka	
Owned by Nankai Electric Railway Co., Ltd.	
Hankai Tramway Co., Ltd. (阪堺電気軌道株式会社)	
Tram operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.hankai.co.jp/">www.hankai.co.jp/</a>	
Procurement: Japanese English:	
Address: Osaka Osaka	
Owned by Nankai Electric Railway Co., Ltd.	
Nishi-Nippon Railroad Co., Ltd. (西日本鉄道株式会社)	
Regular Operator, Large private	Ownership: Private
URL <a href="http://www.nishitetsu.co.jp">www.nishitetsu.co.jp</a>	
Procurement: Japanese English:	
Address: 1-11-17 Tenjin Chuo-ku 810-8570 Fukuoka Fukuoka	
Chikugo Electric Railroad Co., Ltd. (筑豊電気鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.chikutetsu.co.jp/">http://www.chikutetsu.co.jp/</a>	
Procurement: Japanese English:	
Address: 1-6 Nabeyama-cho 809-0022 Nakama Fukuoka	
Owned by Nishi-Nippon Railroad Co., Ltd.	
Shinkeisei Electric Railway Co., Ltd. (新京成電鉄株式会社)	
Regular Operator, Second tier	Ownership: Private
URL <a href="http://www.shinkeisei.co.jp/">http://www.shinkeisei.co.jp/</a>	
Procurement: Japanese English:	
Address: 4-1-12 Kunigyama 273-0192 Kamagaya Chiba	
35-40% owned by Keisei Electric Railway Co., Ltd. And its group companies. Operates one line in Chiba	
TAIHEIYO COAL SERVICES & TRANSPORTATION CO.,LTD. (太平洋石炭販売輸送株式会社)	
Regular Operator, Cargo railway	Ownership: Private
URL <a href="http://www.youhan.co.jp/">http://www.youhan.co.jp/</a>	
Procurement: Japanese English:	
Address: Kushiro Hokkaido	
Sapporo City Transportation Bureau (札幌市交通局)	
NTS,	Ownership: Public
URL <a href="http://www.city.sapporo.jp/st/">www.city.sapporo.jp/st/</a>	
Procurement: Japanese <a href="http://www.city.sapporo.jp/st/keiyaku/">http://www.city.sapporo.jp/st/keiyaku/</a> English:	

Address: 2-4-1 Otanichi Higashi Atsubetsu-ku 004-8555 Sapporo Hokkaido	
<b>Hakodate City Tram Department</b> (函館市企業局交通部)	
Tram operator, Public	Ownership: Public
URL <a href="http://www.city.hakodate.hokkaido.jp/bunya/hakodateshiden/">http://www.city.hakodate.hokkaido.jp/bunya/hakodateshiden/</a>	
Procurement: Japanese <a href="http://www.city.hakodate.hokkaido.jp/docs/2014022600016/">http://www.city.hakodate.hokkaido.jp/docs/2014022600016/</a> English: Address: 15-1 Komabacho 042-0935 Hakodate Hokkaido	
<b>South Hokkaido Railway Company</b> (道南いさりび鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.shr-isaribi.jp/">http://www.shr-isaribi.jp/</a>	
Procurement: Japanese English:	
Address: 12-5 Wakamatsucho 040-0063 Hakodate Hokkaido	
Railway company majority owned by Hokkaido Prefecture, Kushiro-City a.o. started operations in 2016	
<b>Konan Tetsudo</b> (弘南鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://konantetsudo.jp/">http://konantetsudo.jp/</a>	
Procurement: Japanese English:	
Address: Hirakawa Aomori	
Small railway operating in Aomori	
<b>TSUGARU RAILWAY Co.,Ltd</b> (津軽鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://tsutetsu.com/">http://tsutetsu.com/</a>	
Procurement: Japanese English:	
Address: Goshogawarashi Aomori	
Small railway operating in Aomori	
<b>Hachihohe Rinkai Tetsudo K.K.</b> (八戸臨海鉄道株式会社)	
Regular Operator, Cargo railway	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.hachirin.com/">http://www.hachirin.com/</a>	
Procurement: Japanese English:	
Address: Hachihohe Aomori	
Coastal freight railcompany with close to 40% owned by JR Freight Company, 30% by Aomori Prefecture, 10% by Hachihohe city	
<b>Aomori Railway Company</b> (青い森鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.aomorirailway.com/">http://www.aomorirailway.com/</a>	
Procurement: Japanese English:	
Address: Aomori Aomori	

Small railway operating in Aomori, majority owned by Aomori Prefecture.	
<b>IWATE DEVELOPMENT RAILWAY CO.,LTD</b> (岩手開発鉄道株式会社)	
Regular Operator, Cargo railway	Ownership: Private
URL <a href="http://kaihatsu-railway.co.jp/">http://kaihatsu-railway.co.jp/</a>	
Procurement: Japanese English:	
Address: Ofunato Iwate	
Small freight railway company majority owned by Taiheiyo Cement Corporation	
<b>Sanriku Railway Company</b> (三陸鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.sanrikutetsudou.com/">http://www.sanrikutetsudou.com/</a>	
Procurement: Japanese English:	
Address: Miyako Iwate	
Small railway operating in Iwate, majority public ownership (Iwate prefecture and Miyako City)	
<b>IGR Iwate Galaxy Railway Company</b> (アイジーアールいわて銀河鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.igr.jp/">http://www.igr.jp/</a>	
Procurement: Japanese English:	
Address: Morioka Iwate	
Small railway majority owned by Iwate Prefecture	
<b>SENTRIN LTD</b> (仙台臨海鉄道株式会社)	
Regular Operator, Cargo railway	Ownership: Public/Private
URL <a href="http://www.s-rin.com/">http://www.s-rin.com/</a>	
Procurement: Japanese English:	
Address: Sendai Miyagi	
Small freight railway company in Miyagi Prefecture. One-third owned by Miyagi Prefecture and 1/3 by JR Freight Company	
<b>Transportation Bureau City of Sendai</b> (仙台市交通局)	
Regular Operator, Public	Ownership: Public
URL <a href="http://www.kotsu.city.sendai.jp/">http://www.kotsu.city.sendai.jp/</a>	
Procurement: Japanese <a href="http://www.kotsu.city.sendai.jp/business/keiyaku/">http://www.kotsu.city.sendai.jp/business/keiyaku/</a> English:	
Address: Sendai Miyagi	
Operates two subway lines	
<b>Sendai Airport Transit Co.,Ltd.</b> (仙台空港鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.senat.co.jp/">http://www.senat.co.jp/</a>	
Procurement: Japanese English:	
Address: Natori Miyagi	
Operates line connecting Sendai Airport and Natori station. Uses JR East railcars. Majority owned by Miyagi Prefecture, Sendai City	

<b>Abukuma Express.,Ltd</b> (阿武隈急行株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.abukyu.co.jp/">www.abukyu.co.jp/</a>	
Procurement: Japanese English:	
Address: Date Fukushima	
Operates one line between Fukushima and Miyagi. Majority owned by public bodies with Miyagi Prefecture and Fukushima Prefecture possessing majority stake	
<b>Fukushima Rinkai Tetsudo Co., Ltd.</b> (福島臨海鉄道株式会社)	
Regular Operator, Cargo railway	Ownership: Private
URL <a href="http://www.f-rinkai.co.jp/">www.f-rinkai.co.jp/</a>	
Procurement: Japanese English:	
Address: Iwaki Fukushima	
Largest shareholder of this company is JR Freight, followed by Fukushima Prefecture	
<b>Fukushima Transportation, Inc</b> (福島交通 株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.fukushima-koutu.co.jp/">http://www.fukushima-koutu.co.jp/</a>	
Procurement: Japanese English:	
Address: Fukushima Fukushima	
Operates one line from Fukushima city to Izaka-hot springs	
<b>Aizu Railway Co.,Ltd.</b> (会津鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.aizutetsudo.jp/">http://www.aizutetsudo.jp/</a>	
Procurement: Japanese English:	
Address: Aizu-wakamatsu Fukushima	
Operates one line in Fukushima Prefecture. Public organizations hold majority share, with Fukushima Prefecture as the largest single shareholder (31.67%)	
<b>Akita Rinkai Tetsudo Co., Ltd.</b> (秋田臨海鉄道株式会社)	
Regular Operator, Cargo railway	Ownership: Private
URL <a href="http://www.akirin.jp">www.akirin.jp</a>	
Procurement: Japanese English:	
Address: Akita Akita	
Freight railway company in Akita prefecture, largest shareholders are JR Freight and Akita Prefecture	
<b>Yuri Kogen Railway</b> (由利高原鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.obako5.com/">http://www.obako5.com/</a>	
Procurement: Japanese English:	
Address: Yurihonjo Akita	
Small railway operating in Akita, majority owned by Akita prefecture and Yurihonjo city	

<b>Akita Nairiku Jūkan Railway Co.,Ltd.</b> (秋田内陸縦貫鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.akita-nairiku.com/">http://www.akita-nairiku.com/</a>	
Procurement: Japanese English:	
Address: Kita-Akita Akita	
Small railway operating in Central Akita	
<b>YAMAGATA RAILWAY Co.,Ltd</b> (山形鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://flower-liner.jp/">http://flower-liner.jp/</a>	
Procurement: Japanese English:	
Address: Nagai Yamagata	
Small railway operating in Yamagata	
<b>Hitachinaka Seaside Railway Co.,Ltd</b> (ひたちなか海浜鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://hitachinaka-rail.co.jp/">http://hitachinaka-rail.co.jp/</a>	
Procurement: Japanese English:	
Address: Hitachinaka Ibaraki	
Small railway operating one line in Ibaraki	
<b>Kanto Railway Co., Ltd.</b> (関東鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://kantetsu.co.jp/">http://kantetsu.co.jp/</a>	
Procurement: Japanese English:	
Address: Tsuchiura Ibaraki	
Railway operating two lines in Ibaraki and many buslines, part of the Keisei Group	
<b>Tsukubasan Cable Car &amp; Ropeway</b> (筑波観光鉄道株式会社)	
Cable-car operator,	Ownership: Private
URL <a href="http://www.mt-tsukuba.com/">http://www.mt-tsukuba.com/</a>	
Procurement: Japanese English:	
Address: Tsukuba Ibaraki	
Cable car company majority owned by	
<b>Kashima Rinkai Tetsudo Co., Ltd.</b> (鹿島臨海鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.rintetsu.co.jp/">www.rintetsu.co.jp/</a>	
Procurement: Japanese English:	
Address: Higashi-Ibarakigun Ibaraki	
Freight and passenger railway in Ibaraki, largest stock owners are JR Freight and Ibaraki Prefecture	
<b>YAGANTETSUDO RAILWAY CO.LTD.,</b> (野岩鉄道株式会社)	

Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.yagan.co.jp/">www.yagan.co.jp/</a>	
Procurement: Japanese English:	
Address: Nikko Tochigi	
Operates one line between Tochigi and Fukushima prefectures, majority owned by both prefectures	
<b>Moka Railway Co., Ltd.</b> (真岡鐵道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.moka-railway.co.jp/">www.moka-railway.co.jp/</a>	
Procurement: Japanese English:	
Address: Moka Tochigi	
Operates one line in Ibaraki and Tochigi Prefectures, Tochi Prefecture largest single stockholder, followed by municipalities and local banks	
<b>Jōshin Electric Railway Co., Ltd.</b> (上信電鉄株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.joshin-dentetsu.co.jp/">www.joshin-dentetsu.co.jp/</a>	
Procurement: Japanese English:	
Address: Takaoka Gunma	
Operates one line in Gunma	
<b>Jomo Electric Railway Co., Ltd.</b> (上毛電氣鐵道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.jomorailway.com/">http://www.jomorailway.com/</a>	
Procurement: Japanese English:	
Address: Maebashi Gunma	
Operates one line in Gunma, largest stockholder is Tobu Railway, also stocks held by other local railway Joshin Electric	
<b>Watarase Keikoku Railway Co., Ltd.</b> (わたらせ渓谷鐵道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.watetsu.com/">www.watetsu.com/</a>	
Procurement: Japanese English:	
Address: Midori Gunma	
Operates one line in Gunma and Tochigi prefectures, owned by Gunma Prefecture and number of local municipalities	
<b>Chichibu Railway Co., Ltd.</b> (秩父鐵道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.chichibu-railway.co.jp">www.chichibu-railway.co.jp</a>	
Procurement: Japanese English:	
Address: Kumagaya Gunma	
Operates two lines in the North of Saitama Prefecture	
<b>Saitama New Urban Transit Co., Ltd.</b> (埼玉新都市交通株式会社)	

NTS,	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.new-shuttle.jp/">www.new-shuttle.jp/</a>	
Procurement: Japanese English:	
Address: Kita-Adachi-gun Saitama	
Operates AGT system	
<b>Saitama Railway Corporation</b> (埼玉高速鐵道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.s-rail.co.jp/">http://www.s-rail.co.jp/</a>	
Procurement: Japanese English:	
Address: Saitama Saitama	
<b>Ryutetsu Co., Ltd.</b> (流鉄株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://ryutetsu.jp/">http://ryutetsu.jp/</a>	
Procurement: Japanese English:	
Address: Nagareyama Chiba	
Small railway operating one line in Chiba	
<b>Chōshi Electric Railway Co., Ltd.</b> (銚子電氣鐵道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.choshi-dentetsu.jp/">www.choshi-dentetsu.jp/</a>	
Procurement: Japanese English:	
Address: Zushi Chiba	
Small railway operating one line in Chiba	
<b>Kominato Railway Co., Ltd.</b> (小湊鐵道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.kominato.co.jp/">Http://www.kominato.co.jp/</a>	
Procurement: Japanese English:	
Address: Ishihara Chiba	
Small railway operating one line in Chiba, majority owned by Kujūkuri Railway Co., Ltd.	
<b>Keiyo Rinkai Tetsudo Co., Ltd.</b> (京葉臨海鐵道株式会社)	
Regular Operator, Cargo railway	Ownership: Public/Private
URL <a href="http://www.rintetu.co.jp">www.rintetu.co.jp</a>	
Procurement: Japanese English:	
Address:	
Freight railway company with JR Freight and Chiba Prefecture the largest shareholders	
<b>Hokuso Railway Co., Ltd.</b> (北総鐵道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.hokuso-railway.co.jp/">http://www.hokuso-railway.co.jp/</a>	



Procurement: Japanese English:	
Address: Kamagaya Chiba	
Railway 50% owned by Keisei Electric Railway, about 40% owned by public entities	
<b>Yamaman Co.,Ltd.</b> (山万株式会社)	
NTS,	Ownership: Private
URL <a href="http://www.yamaman.co.jp/">http://www.yamaman.co.jp/</a>	
Procurement: Japanese English:	
Address: Tokyo Tokyo	
Real estate developer, owenver of Yukarigaoka-line	
<b>Isumi Railway Co., Ltd.</b> (いすみ鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.isumirail.co.jp/">http://www.isumirail.co.jp/</a>	
Procurement: Japanese English:	
Address: Isumi-gun Chiba	
Operator of one line in Chiba	
<b>Tōyō Rapid Railway Co.,Ltd.</b> (東葉高速鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.toyokosoku.co.jp/">www.toyokosoku.co.jp/</a>	
Procurement: Japanese English:	
Address: Yachiyo Chiba	
Operator of one line in Chiba, largest shareholders Chiba Prefecture, and Funabashi city	
<b>Shibayama Railway Co.,Ltd</b> (芝山鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.sibatetu.co.jp/">www.sibatetu.co.jp/</a>	
Procurement: Japanese English:	
Address: Sanbu-gun Chiba	
Operator of short line near Narita airport, majority owned by Narita International Airport Corporation	
<b>Chiba Urban Monorail Co.,Ltd.</b> (千葉都市モノレール株式会社)	
Monorail,	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.chiba-monorail.co.jp">www.chiba-monorail.co.jp</a>	
Procurement: Japanese English:	
Address: Chiba Chiba	
Monorail operator of two lines in Chiba city, 91% city owned	
<b>Maihama Resort Line Co., Ltd.</b> (株式会社舞浜リゾートライン)	
Monorail,	Ownership: Private
URL	
Procurement: Japanese English:	
Address: Urayasu Chiba	

Operator of Disney resort line (monorail)	
<b>Narita Airport Rapid Railway Company Limited</b> (成田空港高速鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.narita-kousoku.jp/">http://www.narita-kousoku.jp/</a>	
Procurement: Japanese English:	
Address: Tokyo Tokyo	
Owner of a number of lines near Narita aiport, used by JR East and Keisei who each have 1/3 ownership	
<b>Narita Rapid Railway Access Co., Ltd</b> (成田高速鉄道アクセス株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.nra36.co.jp/">http://www.nra36.co.jp/</a>	
Procurement: Japanese English:	
Address: Funabashi Chiba	
Company only owns the lines, which are used by Keisei Electric Railways. Majority of ownership is public	
<b>Bureau of Transportation Tokyo Metropolitan Government</b> (東京都交通局)	
Regular Operator, Public	Ownership: Public
URL <a href="http://www.kotsu.metro.tokyo.jp/">http://www.kotsu.metro.tokyo.jp/</a>	
Procurement: Japanese <a href="http://www.kotsu.metro.tokyo.jp/information/contract/">http://www.kotsu.metro.tokyo.jp/information/contract/</a> English:	
Address: Tokyo Tokyo	
In charge of Tokyo City metrolines (Toei), Arakawa Tram line, Nippori-Toneri line	
<b>Takaotozan Railway Co.,Ltd</b> (高尾登山電鉄株式会社)	
Cable-car operator,	Ownership: Private
URL <a href="http://www.takaotozan.co.jp/">http://www.takaotozan.co.jp/</a>	
Procurement: Japanese English:	
Address: Hachiyoji Tokyo	
Cable car operator	
<b>Tokyo Monorail Company, Limited</b> (東京モノレール株式会社)	
Monorail,	Ownership: Private
URL <a href="http://www.tokyo-monorail.co.jp/">http://www.tokyo-monorail.co.jp/</a>	
Procurement: Japanese English:	
Address: Minato-ku Tokyo	
Monorail operator between Haneda Airport and Hamamatsucho, Majority owned by JR East	
<b>Yurikamome Inc</b> (株式会社ゆりかもめ)	
NTS,	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.yurikamome.co.jp/">http://www.yurikamome.co.jp/</a>	
Procurement: Japanese English:	
Address: Koto-ku Tokyo	
Operator of line in Tokyo, Owned by holding company which is controlled by Tokyo Governor	

<b>Tokyo Waterfront Area Rapid Transit, Inc.</b> (東京臨海高速鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.twr.co.jp">www.twr.co.jp</a>	
Procurement: Japanese English:	
Address: Koto-ku Tokyo	
Operator of line in Tokyo, Owned >90% by Tokyo Metropolitan Government	
<b>Tokyo Tama Intercity Monorail Co., Ltd.</b> (多摩都市モノレール株式会社)	
Monorail,	Ownership: Public/Private (3rd Sector)
URL <a href="http://tama-monorail.co.jp">tama-monorail.co.jp</a>	
Procurement: Japanese English:	
Address: Tachikawa Tokyo	
Monorail operator in Tama city Tokyo, Majority owned by TMG (80%)	
<b>Metropolitan Intercity Railway Company (Tsukuba Express)</b> (首都圏新都市鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.mir.co.jp/">http://www.mir.co.jp/</a>	
Procurement: Japanese English:	
Address: Taito-ku Tokyo	
Operates the Tsukuba-Express Line. Owned mostly by public entities Ibaraki Pref., Tokyo Metro, Chiba Pref. etc.	
<b>IZUHAKONE Railway Co., Ltd</b> (伊豆箱根鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.izuhakone.co.jp/">http://www.izuhakone.co.jp/</a>	
Procurement: Japanese English:	
Address: Mishima Shizuoka	
Operates three lines in Kanagawa and Shizuoka, 84% owned by Seibu Railway Co. Ltd.	
<b>Kanarin Co., Ltd</b> (神奈川臨海鉄道株式会社)	
Regular Operator, Cargo railway	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.kanarin.co.jp/">http://www.kanarin.co.jp/</a>	
Procurement: Japanese English:	
Address: Kawasaki Kanagawa	
Company owned by JR Freight, Yokohama city and Kanagawa Pref	
<b>Yokohama Minatomirai Railway Company</b> (横浜高速鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.mm21railway.co.jp">www.mm21railway.co.jp</a>	
Procurement: Japanese English:	
Address: Yokohama Kanagawa	
Majority owned by Yokohama city	
<b>SHONAN MONORAIL CO., LTD</b>	

<b>(湘南モノレール株式会社)</b>	
Monorail,	Ownership: Private
URL <a href="http://www.shonan-monorail.co.jp/">http://www.shonan-monorail.co.jp/</a>	
Procurement: Japanese English:	
Address: Kamakura Kanagawa	
<b>Transportation Bureau, City of Yokohama</b> (横浜市交通局)	
Regular Operator, Public	Ownership: Public
URL <a href="http://www.city.yokohama.lg.jp/koutuu/">http://www.city.yokohama.lg.jp/koutuu/</a>	
Procurement: Japanese <a href="http://www.city.yokohama.lg.jp/koutuu/kigyonyusatsu/">http://www.city.yokohama.lg.jp/koutuu/kigyonyusatsu/</a> English:	
Address: Yokohama Kanagawa	
<b>Fuji Kyuko Co., Ltd.</b> (富士急行株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.fujikyuko.co.jp/">www.fujikyuko.co.jp/</a>	
Procurement: Japanese English:	
Address: Fuji-Yoshida Yamanashi	
Operator of two lines	
<b>Hokuetsu Express Corporation</b> (北越急行株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.hokuhoku.co.jp/">http://www.hokuhoku.co.jp/</a>	
Procurement: Japanese English:	
Address: Minami-onuma Niigata	
Operator of one line, majority owned by Niigata Prefecture	
<b>Echigo TOKImeki Railway Company</b> (えちごトキめき鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.echigo-tokimeki.co.jp/">http://www.echigo-tokimeki.co.jp/</a>	
Procurement: Japanese English:	
Address: Joetsu Niigata	
99% publicly owned operator of two lines	
<b>ALPICO kotsu Co., Ltd.</b> (アルピコ交通株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.alpico.co.jp/traffic/">www.alpico.co.jp/traffic/</a>	
Procurement: Japanese English:	
Address: Matsumoto Nagano	
Operates one line in Nagano Company owned by ALPICO HOLDINGS Co., Ltd.	
<b>Nagano Electric Railway Co., Ltd.</b> (長野電鉄株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private

URL <a href="http://www.nagaden-net.co.jp/">www.nagaden-net.co.jp/</a>	
Procurement: Japanese English:	
Address: Nagano Nagano	
Operates one line in Nagano	
<b>Uedadentetsu Co.,Ltd.</b> (上田電鉄株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.uedadentetsu.com/index.html">http://www.uedadentetsu.com/index.html</a>	
Procurement: Japanese English:	
Address: Ueda Nagano	
Operates one line in Nagano, main shareholder is Tokyu Corporation	
<b>Shinano Railway Co., Ltd.</b> (しなの鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.shinanorailway.co.jp/">www.shinanorailway.co.jp/</a>	
Procurement: Japanese English:	
Address: Ueda Nagano	
Operates two lines in Nagano	
<b>TOYAMA CHIHO RAILWAY CO.,LTD.</b> (富山地方鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.chitetsu.co.jp/">http://www.chitetsu.co.jp/</a>	
Procurement: Japanese English:	
Address: Toyama Toyama	
Operates a number of lines in Toyama Prefecture	
<b>Ainokaze Toyama Railway Co., Ltd.</b> (あいの風とやま鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://ainokaze.co.jp/">http://ainokaze.co.jp/</a>	
Procurement: Japanese English:	
Address: Toyama Toyama	
90% publicly owned operates one line	
<b>KUROBE GORGE RAILWAY CO., LTD</b> (黒部峡谷鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.kurotetu.co.jp/">www.kurotetu.co.jp/</a>	
Procurement: Japanese English:	
Address: Kurobe Toyama	
Operates one line, wholly owned by Kansai Electric Power Company	
<b>Manyōsen Co., Ltd.</b> (万葉線株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.manyosen.co.jp/">http://www.manyosen.co.jp/</a>	
Procurement: Japanese English:	
Address: Takaoka Toyama	

Operator of two short lines in Toyama. 90% publicly owned	
<b>Toyama Light Rail Co., Ltd.</b> (富山ライトレール株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.t-lr.co.jp/">www.t-lr.co.jp/</a>	
Procurement: Japanese English:	
Address: Toyama Toyama	
Tram operator, Toyama city and Toyama Prefecture own close to half of the stocks	
<b>IR Ishikawa Railway Co.,Ltd.</b> (IR いしかわ鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://ishikawa-railway.jp/">http://ishikawa-railway.jp/</a>	
Procurement: Japanese English:	
Address: Kanazawa Ishikawa	
Operator of one line from Kanazawa city. Owned by Ishikawa Prefecture, Kanazawa City	
<b>NotoTetudou Corporation</b> (のと鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.nototetsu.co.jp/">www.nototetsu.co.jp/</a>	
Procurement: Japanese English:	
Address: Housu-gun Ishikawa	
Operator of one line in Ishikawa prefecture, who is largest stockowner	
<b>FUKUI RAILWAY Co.,Ltd.</b> (福井鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.fukutetsu.jp/">http://www.fukutetsu.jp/</a>	
Procurement: Japanese English:	
Address: Fukui Fukui	
Operator of one line, ownership by semi-public and local associations	
<b>Echizen Railway Co., Ltd</b> (えちぜん鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.echizen-tetudo.co.jp/">www.echizen-tetudo.co.jp/</a>	
Procurement: Japanese English:	
Address: Fukui Fukui	
Operator of two lines from Fukui city, owned in majority by local public entities	
<b>Shizuoka Railway Co., Ltd.</b> (静岡鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.shizutetsu.co.jp/">www.shizutetsu.co.jp/</a>	
Procurement: Japanese English:	
Address: Shizuoka Shizuoka	
Operator of one line in Shizuoka	



Procurement: Japanese English:	
Address: Okazaki Aichi	
Operator of one line in Aichi	
<b>Tokai Transport Service Company</b> (株式会社 東海交通事業)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.tkj-i.co.jp/">http://www.tkj-i.co.jp/</a>	
Procurement: Japanese English:	
Address: Nagoya Aichi	
Operator of line in Aichi Prefecture, fully owned by	
<b>Aichi Rapid Transit Co., Ltd.</b> (愛知高速交通株式会社)	
NTS,	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.linimo.jp/">www.linimo.jp/</a>	
Procurement: Japanese English:	
Address: Nagakute Aichi	
Operator of one line (magnetic levitation linear motor car), majority owned by Aichi Prefecture	
<b>Kami-iida Link Line</b> (上飯田連絡線株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.k-linkline.jp/">http://www.k-linkline.jp/</a>	
Procurement: Japanese English:	
Address: Nagoya Aichi	
Small operator of one rail line and one subway line, Publicly majority owned by Aichi Pref. and Nagoya city	
<b>Central Japan International Airport Line Company, Ltd</b> (中部国際空港連絡鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www1.odn.ne.jp/aqualine/">http://www1.odn.ne.jp/aqualine/</a>	
Procurement: Japanese English:	
Address: Nagoya Aichi	
Operator of line to Chubu Airport, majority ownership by public entities, Nagoya Railways Co. Ltd. Largest private stockowner	
<b>SANGI Railway Co., Ltd.</b> (三岐鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.sangirail.co.jp/">http://www.sangirail.co.jp/</a>	
Procurement: Japanese English:	
Address: Yokkaichi Mie	
Operator of two lines in North part of Mie prefecture	
<b>Ise Tetsudo Railway Company</b> (伊勢鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.isetetu.co.jp">www.isetetu.co.jp</a>	
Procurement: Japanese English:	

Address: Suzuka Mie	
Operator of one line in Mie prefecture	
<b>OHMI Railway Co.,Ltd.</b> (近江鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.ohmitetudo.co.jp/">www.ohmitetudo.co.jp/</a>	
Procurement: Japanese English:	
Address: Hikone Shiga	
Operator of three lines in Mie Prefecture	
<b>Shigaraki Kohgen Railway Co., Ltd.</b> (信楽高原鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://koka-skr.co.jp/">http://koka-skr.co.jp/</a>	
Procurement: Japanese English:	
Address: Koka Shiga	
Operator of one line in Koka city, which is majority owner	
<b>Kyoto Municipal Transportation Bureau</b> (京都市交通局)	
Regular Operator, Public	Ownership: Public
URL <a href="http://www.city.kyoto.lg.jp/kotsu/">www.city.kyoto.lg.jp/kotsu/</a>	
Procurement: Japanese English: <a href="http://www.city.kyoto.lg.jp/kotsu/page/0000006510.html">http://www.city.kyoto.lg.jp/kotsu/page/0000006510.html</a>	
Address: Kyoto Kyoto	
Manages subway/bus systems in Kyoto	
<b>WILLER TRAINS, Inc.)</b> (WILLER TRAINS 株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://trains.willer.co.jp/">http://trains.willer.co.jp/</a>	
Procurement: Japanese English:	
Address: Miyazu Kyoto	
Manages three lines originating from Miyazu city	
<b>Kitakinki Tango Railway Corporation</b> (北近畿タンゴ鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://ktr-tetsudo.jp/corporate/">http://ktr-tetsudo.jp/corporate/</a>	
Procurement: Japanese English:	
Address: Miyazu Kyoto	
Manages two lines originating from Miyazu city, public majority ownership,	
<b>Mizuma Railway Co.,Ltd.</b> (水間鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.suitetsu.com/">www.suitetsu.com/</a>	
Procurement: Japanese English:	
Address: Osaka Osaka	
Operates one line in Kaizuka city	

<b>Osaka Municipal Transportation Bureau</b> (大阪市交通局)	
Regular Operator, Public	Ownership: N.A.
URL <a href="http://www.kotsu.city.osaka.lg.jp/">http://www.kotsu.city.osaka.lg.jp/</a>	
Procurement: Japanese <a href="http://www.kotsu.city.osaka.lg.jp/business/contract.html">http://www.kotsu.city.osaka.lg.jp/business/contract.html</a> English:	
Address: Osaka Osaka	
Manages Osaka's subway, bus and tram systems	
<b>OSAKA MONORAIL CO.,LTD.</b> (大阪高速鉄道株式会社)	
Monorail,	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.osaka-monorail.co.jp/">www.osaka-monorail.co.jp/</a>	
Procurement: Japanese English:	
Address: Toyonaka Osaka	
Monorail operator, majority owned by	
<b>Kansai Rapid Railway Co.,Ltd.</b> (関西高速鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.kr-railway.co.jp/">http://www.kr-railway.co.jp/</a>	
Procurement: Japanese English:	
Address: Osaka Osaka	
Owner of railtracks, company owned by Osaka prefecture, Osaka city and JR West (23.91% each)	
<b>Osaka port Transport System Co.ltd</b> (株式会社大阪港トランスポートシステム)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.opts.co.jp/">http://www.opts.co.jp/</a>	
Procurement: Japanese English:	
Address: Osaka Osaka	
Freight company	
<b>Osaka Soto-Kanjo Railway Co., Ltd</b> (大阪外環状鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.osr.co.jp/">http://www.osr.co.jp/</a>	
Procurement: Japanese English:	
Address: Osaka Osaka	
<b>Mt.ROKKO CABLE CAR &amp; TOURISM COMPANY</b> (六甲山観光株式会社)	
Cable-car operator,	Ownership: Private
URL <a href="http://www.rokkosan.com/">http://www.rokkosan.com/</a>	
Procurement: Japanese English:	
Address: Kobe Hyogo	
name changed in 2013 from ・六甲摩耶鉄道	
<b>Kobe municipal bureau of transportation</b> (神戸市交通局)	
Regular Operator, Public	Ownership: N.A.

URL <a href="http://www.city.kobe.lg.jp/life/access/transport/index.html">http://www.city.kobe.lg.jp/life/access/transport/index.html</a>	
Procurement: Japanese <a href="http://www.city.kobe.lg.jp/business/contract/index.html">http://www.city.kobe.lg.jp/business/contract/index.html</a> English:	
Address: Kobe Hyogo	
Manages Kobe's subway and bus systems	
<b>Kobe New Transit Co. Ltd.</b> (神戸新交通株式会社)	
NTS,	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.knt-liner.co.jp/">http://www.knt-liner.co.jp/</a>	
Procurement: Japanese English:	
Address: Kobe Hyogo	
Manages a number of new transport systems in Kobe	
<b>Hojo Railway Company</b> (北条鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.hojorailway.jp/">www.hojorailway.jp/</a>	
Procurement: Japanese English:	
Address: Kasai Hyogo	
Operates one line in Hyogo Pref	
<b>Kishu Railway Co.,Ltd.</b> (紀州鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.kitetsu.co.jp/">www.kitetsu.co.jp/</a>	
Procurement: Japanese English:	
Address: Tokyo Tokyo	
Micro company operating one line in Wakayama	
<b>WAKAYAMA ELECTRIC RAILWAY Co., Ltd.</b> (和歌山電鐵株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.wakayama-dentetsu.co.jp/">www.wakayama-dentetsu.co.jp/</a>	
Procurement: Japanese English:	
Address: Wakayama Wakayama	
Operates one line. Fully owned by Okayama Electric Tramway Co., Ltd.	
<b>Okayama Electric Tramway Co., Ltd.</b> (岡山電気軌道株式会社)	
Tram operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.okayama-kido.co.jp/">http://www.okayama-kido.co.jp/</a>	
Procurement: Japanese English:	
Address: Okayama Okayama	
Operates streetcars and buses in Okayama	
<b>Wakasa Railway Co., Ltd.</b> (若桜鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL	
Procurement: Japanese English:	

Address: Yazu-gun Tottori	
Operates one line in Tottori Prefecture, primarily owned by local municipality, Tottori prefecture and Tottori city	
<b>Chizu Express Company</b> (智頭急行株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.chizukyu.co.jp/">http://www.chizukyu.co.jp/</a>	
Procurement: Japanese English:	
Address: Yazu-gun Tottori	
Operates one line in Tottori Prefecture, Hyogo, and Okayama Prefectures.	
<b>Ichibata Electric Railway Co.,Ltd.</b> (一畑電車株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.ichibata.co.jp/railway/">http://www.ichibata.co.jp/railway/</a>	
Procurement: Japanese English:	
Address: Izumo Shimane	
Operates two lines in Shimane Prefecture	
<b>Mizushima Rinkai Railway Co.,Ltd.</b> (水島臨海鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.mizurin.co.jp/">www.mizurin.co.jp/</a>	
Procurement: Japanese English:	
Address: Kurashiki Okayama	
Operates three lines in Kurashiki. Owned by JR Freight, Kurashiki City and Okayama Prefecture	
<b>Ibara Railway Company</b> (井原鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://plus.harenet.ne.jp/~ibarasen/index.html">http://plus.harenet.ne.jp/~ibarasen/index.html</a>	
Procurement: Japanese English:	
Address: Ibara Okayama	
Small operator operating one line, owned by Okayama, Hiroshima prefectures and municipalities	
<b>Hiroshima Electric Railway Co., Ltd.</b> (広島電鉄株式会社)	
Tram operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.hiroden.co.jp">www.hiroden.co.jp</a>	
Procurement: Japanese English:	
Address: Hiroshima Hiroshima	
Streetcar operator in Hiroshima city	
<b>Hiroshima Rapid Transit Co., Ltd.</b> (広島高速交通株式会社)	
NTS,	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.astramline.co.jp/">http://www.astramline.co.jp/</a>	
Procurement: Japanese English:	
Address: Hiroshima Hiroshima	

New transit system majority owned by Hiroshima City	
<b>NISHIKIGAWA TETUDOU Co.,Ltd.</b> (錦川鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://nishikigawa.com/">nishikigawa.com/</a>	
Procurement: Japanese English:	
Address: Iwakuni Yamaguchi	
Operates one line in Yamaguchi, largest owner Iwakuni City, Yamaguchi Pref.	
<b>TAKAMATSU-KOTOHIRA ELECTRIC RAILROAD Co.,Ltd.</b> (高松琴平電気鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.kotoden.co.jp/">http://www.kotoden.co.jp/</a>	
Procurement: Japanese English:	
Address: Takamatsu Kanagawa	
Operates three lines from Takamatsu	
<b>ASA Seaside Railway Corporation</b> (阿佐海岸鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://asatetu.com/">http://asatetu.com/</a>	
Procurement: Japanese English:	
Address: Kaifu-gun Tokushima	
Operates one line in Tokushima	
<b>Iyo Railway Co., Ltd.</b> (伊予鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.iyotetsu.co.jp">www.iyotetsu.co.jp</a>	
Procurement: Japanese English:	
Address: Matsuyama Ehime	
Operates trains, buses and streetcars in Matsuyama city and Ehime prefecture	
<b>Tosa Kuroshio Tetsudo Co.,Ltd.</b> (土佐くろしお鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.tosakuro.co.jp/">www.tosakuro.co.jp/</a>	
Procurement: Japanese English:	
Address: Shimanto Kochi	
Operates three lines in Kochi Prefecture	
<b>TOSADEN TRAFFIC CO.,LTD</b> (とさでん交通株式会社)	
Tram operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.tosaden.co.jp/">http://www.tosaden.co.jp/</a>	
Procurement: Japanese English:	
Address: Kochi Kochi	
Streetcar/Bus operator in Kochi city. Majority ownership by Kochi Prefecture and Kochi City	

<b>Fukuoka City Transportation Bureau</b> (福岡市交通局)	
Regular Operator, Public	Ownership: Public
URL <a href="http://subway.city.fukuoka.lg.jp/">http://subway.city.fukuoka.lg.jp/</a>	
Procurement: Japanese English:	
Address: Fukuoka Fukuoka	
Manages Fukuoka's subway system	
<b>AMAGI TETSUDOU.</b> (甘木鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.amatetsu.jp/">http://www.amatetsu.jp/</a>	
Procurement: Japanese English:	
Address: Asakura Fukuoka	
Operates one line in Fukuoka prefecture, owned by municipalities	
<b>Heisei Chikuho Railway Co.,Ltd.</b> (平成筑豊鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.heichiku.net/">www.heichiku.net/</a>	
Procurement: Japanese English:	
Address: Tagawa-gun Fukuoka	
Operates four lines in Fukuoka Prefecture	
<b>Kitakyushu Urban Monorail Co.,Ltd</b> (北九州高速鉄道株式会社)	
Monorail,	Ownership: Public
URL <a href="http://www.kitakyushu-monorail.co.jp/">http://www.kitakyushu-monorail.co.jp/</a>	
Procurement: Japanese English:	
Address: Kitakyushu Fukuoka	
Monorail operator	
<b>Matsuura Railway Co., Ltd.</b> (松浦鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.matutetu.com/">http://www.matutetu.com/</a>	
Procurement: Japanese English:	
Address: Sasebo Nagasaki	
Operates one line in Nagasaki Prefecture	
<b>Shimabara Railroad Co.,Ltd</b> (島原鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.shimatetsu.co.jp">www.shimatetsu.co.jp</a>	
Procurement: Japanese English:	
Address: Shimabara Nagasaki	
Operates one line in Nagasaki Prefecture	
<b>Nagasaki Electric Tramway Co., Ltd.</b> (長崎電気軌道株式会社)	
Tram operator, Small & Medium sized private	Ownership: Private

URL <a href="http://www.naga-den.com">www.naga-den.com</a>	
Procurement: Japanese English:	
Address: Nagasaki Nagasaki	
Streetcar operator in Nagasaki City	
<b>Kumamotodentetsu Co., Ltd.</b> (熊本電気鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.kumamotodentetsu.co.jp/">www.kumamotodentetsu.co.jp/</a>	
Procurement: Japanese English:	
Address: Kumamoto Kumamoto	
Operator of two lines in Kumamoto Prefecture	
<b>Minami Aso Railway Co.,Ltd.</b> (南阿蘇鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.mt-torokko.com">www.mt-torokko.com</a>	
Procurement: Japanese English:	
Address: Aso-gun Kumamoto	
Operator of one line neara Mt. Aso	
<b>Kumagawa Rail Road</b> (くま川鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.kumagawa-rail.com">www.kumagawa-rail.com</a>	
Procurement: Japanese English:	
Address: Hitoyoshi Kumamoto	
Operator of one line in Kumamoto Prefecture	
<b>Kumamoto City Transportation Bureau</b> (熊本市交通局)	
Tram operator, Public	Ownership: Public
URL <a href="http://www.kotsu-kumamoto.jp/">www.kotsu-kumamoto.jp/</a>	
Procurement: Japanese <a href="http://www.kotsu-kumamoto.jp/kihon/pub/default.aspx?c_id=20">http://www.kotsu-kumamoto.jp/kihon/pub/default.aspx?c_id=20</a> English:	
Address: Kumamoto Kumamoto	
Operates streecars and busses in Kumamoto City	
<b>Hisatsu Orange Railway Co., Ltd.</b> (肥薩おれんじ鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.hs-orange.com">www.hs-orange.com</a>	
Procurement: Japanese English:	
Address: Yatsushiro Kumamoto	
Operates one line in Kumamoto and Kagoshima Prefectures	
<b>Kagoshima City Transportation Bureau</b> (鹿児島市交通局)	
Tram operator, Public	Ownership: Public
URL <a href="http://www.kotsu-city-kagoshima.jp/">http://www.kotsu-city-kagoshima.jp/</a>	
Procurement: Japanese <a href="http://www.kotsu-city-kagoshima.jp/cust-bid/">http://www.kotsu-city-kagoshima.jp/cust-bid/</a> English:	
Address: Kagoshima Kagoshima	



Operates streetcars and buses in Kagoshima city	
<b>Okinawa Urban Monorail. Inc.</b> (沖縄都市モノレール株式会社)	
Monorail,	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.yui-rail.co.jp">www.yui-rail.co.jp</a>	
Procurement: Japanese English:	
Address: Naha Okinawa	
Operates monorail in Naha, ownership primarily public	
<b>Tango Kairiku Koutsu Co., Ltd</b> (丹後海陸交通株式会社)	
Cable-car operator, Private	Ownership: Private
URL <a href="http://www.tankai.jp/">http://www.tankai.jp/</a>	
Procurement: Japanese English:	
Address: Yosa-gun Kyoto	
Cable car company majority owned by Hankyu Hanshin Holdings, Inc.	
<b>Hobashira Cable Co., Ltd.</b> (皿倉登山鉄道株式会社)	
Cable-car operator, Private	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.sarakurayama-cablecar.co.jp">www.sarakurayama-cablecar.co.jp</a>	
Procurement: Japanese English:	
Address: Kitakyushu Fukuoka	
Cable car company owned by Kitakyushu city	
<b>TATEYAMA KUROBE KANKO CO., LTD.</b> (立山黒部貫光株式会社)	
Cable-car operator,	Ownership: Private
URL <a href="https://tkk.alpen-route.co.jp/">https://tkk.alpen-route.co.jp/</a>	
Procurement: Japanese English:	
Address: Toyama Toyama	
Cable car company privately owned, however with 17.2% stake by Toyama Prefecture	
<b>Kuramadera</b> (鞍馬寺)	
Cable-car operator,	Ownership: Private
URL <a href="http://www.kuramadera.or.jp/">http://www.kuramadera.or.jp/</a>	
Procurement: Japanese English:	
Address:	
<b>Kobe Housing &amp; Urban Development Corporation</b> (神戸すまいまちづくり公社)	
Cable-car operator,	Ownership: Private
URL <a href="http://www.kobe-sumai-machi.or.jp/business/sightseeing.html">http://www.kobe-sumai-machi.or.jp/business/sightseeing.html</a>	
Procurement: Japanese English:	
Address: Kobe Hyogo	
Operator of cable cars in Kobe area	
<b>Shikoku Cable</b> (四国ケーブル株式会社)	
Cable-car operator,	Ownership: Private
URL <a href="http://www.shikoku-cable.co.jp/">http://www.shikoku-cable.co.jp/</a>	

Procurement: Japanese English:	
Address: Kagawa Takamatsu	
Operator of cable cars in Shikoku	
<b>OKAMOTO MFG.CO.,LTD</b> (株式会社 岡本製作所)	
Cable-car operator,	Ownership: Private
URL <a href="http://www.okamotos.co.jp/">http://www.okamotos.co.jp/</a>	
Procurement: Japanese English:	
Address: Osaka Osaka	
Operator of cable car in Beppu, Oita Prefecture	
<b>Seikan Tunnel Museum</b> (青函トンネル記念館)	
Cable-car operator,	Ownership: Private
URL <a href="http://seikan-tunnel-museum.jp/">http://seikan-tunnel-museum.jp/</a>	
Procurement: Japanese English:	
Address: Higashi-Tsugaru-gun Aomori	
Operator cable car	
<b>Chiba Newtown Railway Co.,Ltd.</b> (千葉ニュータウン鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.keisei.co.jp/keisei/kanren/7.html">http://www.keisei.co.jp/keisei/kanren/7.html</a>	
Procurement: Japanese English:	
Address: ishikawa Chiba	
Company with no employees owns line in Chiba, owned 100% by Keisei Electric Railway Co., Ltd	
<b>Yokkaichi City</b> (四日市市)	
Regular Operator, Small & Medium sized	Ownership: N.A.
URL <a href="http://www5.city.yokkaichi.mie.jp/">http://www5.city.yokkaichi.mie.jp/</a>	
Procurement: Japanese English:	
Address: Yokkaichi Mie	
Yokkaichi City is part owner of trainline	
<b>Kita-Kyushu city</b> (北九州市)	
Regular Operator, Small & Medium sized	Ownership: N.A.
URL	
Procurement: Japanese English:	
Address: Kita-Kyushu Fukuoka	
City is registered with MLIT as regular operator of railways and cable cars due to part or full ownership of railway companies	
<b>Wakayama Prefecture</b> (和歌山県)	
Regular Operator, Small & Medium sized	Ownership: N.A.
URL	
Procurement: Japanese English:	
Address: Wakayama Wakayama	

Prefecture is registered with MLIT as a regular operator and owner of part of train line	
<b>Sagano Scenic Railway Co.,Ltd.</b> (嵯峨野観光鉄道株式会社)	
Regular Operator, Small & Medium sized private	Ownership: Private
URL <a href="http://www.sagano-kanko.co.jp/">http://www.sagano-kanko.co.jp/</a>	
Procurement: Japanese English:	
Address: Kyoto Kyoto	
Trolley train operating between Kyoto and Kameoka, subsidiary of	
<b>Aomori Prefecture</b> (青森県)	
Regular Operator, Small & Medium sized	Ownership: N.A.
URL	
Procurement: Japanese English:	
Address: Aomori Aomori	
Prefecture is registered with MLIT as a regular operator and owner of Aomori Railway Company	
<b>Yazu-cho</b> (八頭町)	
Regular Operator, Small & Medium sized	Ownership: N.A.
URL	
Procurement: Japanese English:	
Address: Yazu Tottori	
Municipality is registered as an operator due to ownership of Wakasa Railway Co., Ltd.	
<b>Kouka-city</b> (甲賀市)	
Regular Operator, Small & Medium sized	Ownership: N.A.
URL	
Procurement: Japanese English:	
Address: Kouka Shiga	
City is registered as an operator due to ownership of Shigaraki Kohgen Railway Co., Ltd.	
<b>Wakasa-cho</b> (若桜町)	
Regular Operator, Small & Medium sized	Ownership: N.A.
URL	
Procurement: Japanese English:	
Address: Wakasa-cho Tottori	
Municipality is registered as an operator due to ownership of Wakasa Railway Co., Ltd.	

## b. List of suppliers

<b>HJR Corporation</b> (北海道ジェイ・アール商事)	
Supplier,	Ownership: Private
URL <a href="http://www.h-jrshoji.jp/">http://www.h-jrshoji.jp/</a>	

Procurement: Japanese <a href="http://www.h-jrshoji.jp/">http://www.h-jrshoji.jp/</a> English:	
Address: 4-1-4 Kita 6 Johigashi, Higashi Ward 060-0906 Sapporo Hokkaido	
Company in charge of materials' procurement for JR Hokkaido	
<b>JR Kyushu Trading Co. Ltd</b> (JR九州商事株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.jrk-shoji.co.jp/">http://www.jrk-shoji.co.jp/</a>	
Procurement: Japanese <a href="http://www.jrk-shoji.co.jp/index.html">http://www.jrk-shoji.co.jp/index.html</a> English: N.A.	
Address: 2-17-1 Hataka-ekimae Hakata-ku 812-0011 Fukuoka Fukuoka	
Company in charge of procurement for JR Kyushu	
<b>Tobu Engineering`</b> (東武エンジニアリング株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.tobu.co.jp/engineering/">http://www.tobu.co.jp/engineering/</a>	
Procurement: Japanese English:	
Address: 2-18-12 Sumida-ku Oshiage 131-0045 Tokyo Tokyo	
Subsidiary of Tobu Railways, in charge of maintenance of company infrastructure.	
<b>Tobu Intertech</b> (東武インターテック株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.tobu.co.jp/t-intertech/">http://www.tobu.co.jp/t-intertech/</a>	
Procurement: Japanese English:	
Address: Kita-Hiroshima 1323-3 349-1111 Kuki Saitama	
Subsidiary of Tobu Railways, in charge of maintenance and development of rolling stock	
<b>Tobu Station Service</b> (東武ステーションサービス株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.tobu.co.jp/station-s/">http://www.tobu.co.jp/station-s/</a>	
Procurement: Japanese English:	
Address: 2-18-12 Sumida-ku Oshiage 131-0045 Tokyo Tokyo	
Subsidiary of Tobu Railways, in charge of management of the Tobu-stations	
<b>Keio Construction Co.,Ltd.</b> (京王建設株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.keio-const.co.jp/">http://www.keio-const.co.jp/</a>	
Procurement: Japanese English:	
Address: Fuchuu-machi 2-1-1 Keiou Fuchu 2 chome Bldg 183-0055 Fuchu Tokyo	
Subsidiary of Keio Corporation, in charge of design and construction of Keio Railways	
<b>Keio Juuki Seibi Co., Ltd.</b> (京王重機整備株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.keiojuuki.co.jp/">http://www.keiojuuki.co.jp/</a>	
Procurement: Japanese English:	
Address: Shibuya-ku Sasazuka 1-47-1 Merkmall Keio Sasazuka 4F 151-0073 Tokyo Tokyo	

Subsidiary of Keio Corporation, in charge of maintenance of traincars, sales of train parts, manufacture/sales of special train cars	
Odakyu Engineering Co.,Ltd. (小田急エンジニアリング)	
Supplier,	Ownership: Private
URL <a href="http://www.odakyu-eng.co.jp/index.html">http://www.odakyu-eng.co.jp/index.html</a>	
Procurement: Japanese English:	
Address: Yoyogi 2-40-3 151-0053 Shibuya Tokyo	
Construction consultant in charge of construction and maintenance of rail and electrical facilities and traincars	
Odakyu Group Materials (小田急グループマテリアルズ)	
Supplier,	Ownership: Private
URL	
Procurement: Japanese English:	
Address: Nishi Shinjuku 1-8-3 Shinjuku Tokyo	
Company established for joint procurement of train cars and buses for the Odakyu group.	
TOKYU TECHNO SYSTEM CO., LTD (東急テクノシステム株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.tokyu-techno.co.jp/">http://www.tokyu-techno.co.jp/</a>	
Procurement: Japanese English:	
Address: Higashi-Arima Miyamae-ku 2-2-15 216-0002 Kawasaki Kanagawa	
Group company in charge of renovation of train cars, but also buildings and highway maintenance	
TOKYU KIDOH KOGYO Co., Ltd (東急軌道工業株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.tokyu-kidoh.co.jp/">http://www.tokyu-kidoh.co.jp/</a>	
Procurement: Japanese English:	
Address: Nakahara-ku Marukodori 2-2421-5 211-0006 Kawasaki Kanagawa	
Group company in charge of rail construction and maintenance and management of railway facilities	
Keikyu Fine-tec Co., Ltd. (株式会社京急ファインテック)	
Supplier,	Ownership: Private
URL <a href="http://www.keikyu-ftec.co.jp/">http://www.keikyu-ftec.co.jp/</a>	
Procurement: Japanese English:	
Address: Minato-ku Takanawa 2-21-28 Tokyo 3rd Bldg 108-0074 Tokyo Tokyo	
Wholly owned subsidiary involved in maintenance of traincars and buses	
Keikyu System Co.,LTD. (株式会社京急システム)	
Supplier,	Ownership: Private
URL <a href="http://www.keikyu-system.co.jp/">http://www.keikyu-system.co.jp/</a>	
Procurement: Japanese English:	
Address: Minato-ku Takanawa 2-21-28 Tokyo 3rd Bldg 108-0074 Tokyo Tokyo	
Wholly owned subsidiary involved in rail related IT systems	

Metro Sharyo Co. Ltd (メトロ車両株式会社)	
Supplier,	Ownership: Public
URL <a href="http://www.metosha.co.jp/">http://www.metosha.co.jp/</a>	
Procurement: Japanese English:	
Address: 5-6-6 Higashi-Ueno, Taito-ku Tokyo Tokyo	
Wholly owned subsidiary of Tokyo Metro Co. Ltd in charge of maintenance and inspection of traincars and construction of depots	
Metro Kaihatsu Co. Ltd (メトロ開発株式会社)	
Supplier,	Ownership: Public
URL <a href="http://www.metro-dev.co.jp/">http://www.metro-dev.co.jp/</a>	
Procurement: Japanese English:	
Address: 11-9 Kodonmachou Nihonbashi Chuou-ku 103-001 Tokyo Tokyo	
Wholly owned subsidiary of Tokyo Metro Co. Ltd in charge of construction and consultancy work of rail infrastructure and related facilities	
Metro Rail Facilities Co.,Ltd. (株式会社メトロレールファシリティーズ)	
Supplier,	Ownership: Public
URL <a href="http://www.metro-railfa.co.jp/">http://www.metro-railfa.co.jp/</a>	
Procurement: Japanese English:	
Address: 4-27-16 Higashi-nakano, Nakano-ku, 164-0003 Tokyo Tokyo	
Wholly owned subsidiary of Tokyo Metro Co. Ltd in charge of maintenance and management of railways, consultancy	
Subway Maintenance CO.,Ltd. (株式会社 地下鉄メンテナンス)	
Supplier,	Ownership: Public
URL <a href="http://www.chikamen.co.jp/">http://www.chikamen.co.jp/</a>	
Procurement: Japanese English:	
Address: 5-6-6 Higashi-Ueno, Taito-ku, Tokyo Metro Higashi Ueno 5-chome bldg. 6F Tokyo Tokyo	
Wholly owned subsidiary of Tokyo Metro Co. Ltd in charge of maintenance and management of electrical, aircondition and station facilities	
Meielec Co., Ltd. (株式会社メイエレック)	
Supplier,	Ownership: Private
URL <a href="http://www.meielec.co.jp/">http://www.meielec.co.jp/</a>	
Procurement: Japanese English:	
Address: 4-3-36 Jingu, Atsuta Ward 456-0031 Nagoya Aichi	
Group company with broad activities in general engineering, in charge of maintenance and inspection of machinery at stations, signalling, development of unmanned station systems and software.	
Kinki Sharyo Co., Ltd. (近畿車輛株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.kinkisharyo.co.jp/">http://www.kinkisharyo.co.jp/</a>	
Procurement: Japanese <a href="http://www.kinkisharyo.co.jp/shizai/">http://www.kinkisharyo.co.jp/shizai/</a> English:	
Address: 2-2-46, Inada-Uemachi 577-8511 Higashi-Osaka City Osaka	
30% ownership by Kintetsu Corporation	

KINTETSU ELECTRICAL ENGINEERING CO.,LTD (近鉄電気エンジニアリング株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.kee-net.co.jp/">http://www.kee-net.co.jp/</a>	
Procurement: Japanese English:	
Address: 5-7-12 Uenomachi Tennoji-ku 543-0001 Osaka Osaka	
Group company of Kintetsu Group Holdings, active in railway related electrical system, information system development, CATV and station systems	
Kintetsu Railcar Engineering Co.,Ltd (近鉄車両エンジニアリング株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.kre-net.co.jp/">http://www.kre-net.co.jp/</a>	
Procurement: Japanese English:	
Address: 5-7-13 Uenomachi Tennoji-ku 543-0001 Osaka Osaka	
Wholly owned subsidiary in charge of inspection, repairs and maintenance of railcars. Also development of driver support and warning systems,	
Dai Nippon Construction (大日本土木株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.dnc.co.jp/">http://www.dnc.co.jp/</a>	
Procurement: Japanese English:	
Address: 1-3-11 Usa Minami 500-8555 Gifu Gifu	
Construction company, 15% equity stake by Kintetsu, active among others in construction of railway construction and engineering	
Kintetsu Track Engineering Co. Ltd (近鉄軌道エンジニアリング株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.kte-net.co.jp/company/">http://www.kte-net.co.jp/company/</a>	
Procurement: Japanese English:	
Address: 5-7-12 Uenomachi Tennoji-ku Kintetsu North Bld. 3F 543-0001 Osaka Osaka	
Wholly owned subsidiary active in engineering, construction or rail infrastructure, maintenance and sails of parts for railways.	
ALL NIPPON ENGINEERING CONSULTANTS CO.,LTD. (全日本コンサルタント株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.zennippon-c.co.jp/">http://www.zennippon-c.co.jp/</a>	
Procurement: Japanese English:	
Address: 1-4-38 Minato machi Naniwa-ku 556-0017 Osaka Osaka	
Wholly owned subsidiary active in a variety of activities including railways	
Kintetsu Information System Co., Ltd (近鉄情報システム株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.kintetsu-is.co.jp/">http://www.kintetsu-is.co.jp/</a>	
Procurement: Japanese English:	
Address: 6-5-13 Uenomachi Tennoji 543-0001 Osaka Osaka	
Wholly owned subsidiary in charge of maintenance and development of IT systems for Kintetsu and Kintetsu Holdings	
Hankyu Hanshin Railway Technology Co.,Ltd.	

(阪急阪神レールウェイ・テクノロジー株式会社)	
Supplier,	Ownership: Private
URL <a href="http://rwt.hankyu.co.jp/">http://rwt.hankyu.co.jp/</a>	
Procurement: Japanese English:	
Address: 3-1-14 Jusohonmachi, Yodogawa Ward 532-0024 Osaka Osaka	
Jointly owned by Hankyu and Hanshin company is active in maintenance and repair of railway infrastructure	
Hanshin Sharyo Maintenance (阪神車両メンテナンス株式会社)	
Supplier,	Ownership: Private
URL <a href="http://hccweb5.bai.ne.jp/~hel77101/index.html">http://hccweb5.bai.ne.jp/~hel77101/index.html</a>	
Procurement: Japanese English:	
Address: 116 Kitajonai, 660-0826 Amagasaki Hyogo	
Railcar maintenance	
Hankyu Hanshin Electric System Co.Ltd (株式会社阪急阪神電気システム)	
Supplier,	Ownership: Private
URL <a href="http://www.hhes.hankyu-hanshin.co.jp/">http://www.hhes.hankyu-hanshin.co.jp/</a>	
Procurement: Japanese English:	
Address: 3-7-11 Jusohonmachi, Yodogawa Ward 532-0024 Osaka Osaka	
Railway electrical systems construction and maintenance for Hanshin and Hankyu	
Alna Sharyo Co. ,Ltd (アルナ車両株式会社)	
Supplier,	Ownership: Private
URL <a href="http://alna-sharyo.co.jp/">http://alna-sharyo.co.jp/</a>	
Procurement: Japanese English:	
Address: 1-2 Hankyushojaku 566-0013 Settsu Osaka	
Wholly owned Construction, inspection and maintenance of railcars	
Hanshin Kensetsu Co.,Ltd. (株式会社ハンシン建設)	
Supplier,	Ownership: Private
URL <a href="http://www.hanshin-const.co.jp/">http://www.hanshin-const.co.jp/</a>	
Procurement: Japanese English:	
Address: 2-10-5 Tsukuda, Nishiyodogawa Ward 555-0001 Osaka Osaka	
Wholly owned construction company, also involved in railway infrastructure	
Hankyu Sekkei Consultant (阪急設計コンサルタント)	
Supplier,	Ownership: Private
URL <a href="http://sekkei.hankyu.co.jp/">http://sekkei.hankyu.co.jp/</a>	
Procurement: Japanese English:	
Address: 1-4-8 Shibata, Kita-ku 530-0012 Osaka Osaka	
Construction consultant, includes activities in surveying, engineering and planning of railway infrastructure. Wholly owned by	
OMTEC INC. (株式会社オムテック)	
Supplier,	Ownership: Private

URL <a href="http://www.omtecinc.co.jp/">http://www.omtecinc.co.jp/</a>	
Procurement: Japanese English:	
Address: Ikeda Osaka	
Itec Hankyu Hanshin CO.,LTD (アイテック阪急阪神株式会社)	
Supplier,	Ownership: Private
URL <a href="http://itec.hankyu-hanshin.co.jp/">http://itec.hankyu-hanshin.co.jp/</a>	
Procurement: Japanese English:	
Address: Osaka Osaka	
IT company with also activities in railways related information management and signalling systems. Majority owned by Hanshin Electric Railways Corp	
Nankai Vehicles Service Engineering Co. Ltd (南海車両工業株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.nansya.jp/">http://www.nansya.jp/</a>	
Procurement: Japanese English:	
Address: 1-24-1 Kannabecho, Sakai Ward 590-0984 Sakai Osaka	
Railcar maintenance and renovation company Owned by	
Nankai Tatsumura Construction Co., Ltd. (南海辰村建設株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.nantatsu.co.jp">www.nantatsu.co.jp</a>	
Procurement: Japanese English:	
Address: 3-5-19 Nanbanaka, Naniwa Ward 556-0011 Osaka Osaka	
Majority owned by	
Nichiden-Syokai.,lt (株式会社日電商会)	
Supplier,	Ownership: Private
URL <a href="http://www.ndsyokai.co.jp/">http://www.ndsyokai.co.jp/</a>	
Procurement: Japanese English:	
Address: 1-36-6 Yamamotocho Sakai-ku 590-0983 Sakai Osaka	
Communication related services and products	
Nishitetsu Station Service (株式会社西鉄ステーションサービス)	
Supplier,	Ownership: Private
URL <a href="http://www.nnr-nss.co.jp/">http://www.nnr-nss.co.jp/</a>	
Procurement: Japanese English:	
Address: 2-6-1 Watanabedori Chuo-ku 810-0004 Fukuoka Fukuoka	
Owned by	
Nishitetsu M-TECH Co.,Ltd. (西鉄エム・テック株式会社)	
Supplier,	Ownership: Private
URL <a href="http://m-tech.nnr.co.jp/">http://m-tech.nnr.co.jp/</a>	
Procurement: Japanese English:	
Address: 5-21-13 Chiyo Hakata-ku 812-0044 Fukuoka Fukuoka	

Maintenance of busses and cares, sales of parrts, IT related equipment and its development etc. Main customers are Nishitetsu Group companies. Majority owner	
Nishitetsu Techno Service (西鉄テクノサービス株式会社)	
Supplier,	Ownership: Private
URL <a href="http://nishitetsu-techno.jp/">http://nishitetsu-techno.jp/</a>	
Procurement: Japanese English:	
Address: 3-16-26 Yakuin, Chuo Ward, 810-0022 Fukuoka Fukuoka	
Construction materials for railways, roads etc.; Railroad materials. Maintenance of railcars. Construction machinery. Owned by	
Nishitetsu Densetsu Kogyo co.,Ltd (西鉄電設工業株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.nishitetsu.ne.jp/f-ndk/">http://www.nishitetsu.ne.jp/f-ndk/</a>	
Procurement: Japanese English:	
Address: 2-10-3 Ohashi Minami-ku Fukuoka Fukuoka	
Construction company in Nishitetsu group. Design, construction and maintenance of railways, railway signalling and electrical installations. Fully owned by	
Nishitetsu C.E. Consultant Co. Ltd (西鉄シー・イー・コンサルタント株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.ncec.co.jp/">http://www.ncec.co.jp/</a>	
Procurement: Japanese English:	
Address: 1-3-11 Hirao Chuo-ku 810-0014 Fukuoka Fukuoka	
Consultancy in the Nishitetsu group involved in planning, design of railroads, roads and rivers. Also surveying and soil analysis, and maintenance and asset management.	
Nimoca Co.,Ltd. (株式会社ニモカ)	
Supplier,	Ownership: Private
URL <a href="https://www.nimoca.jp/company/">https://www.nimoca.jp/company/</a>	
Procurement: Japanese English:	
Address: 1-11-17 Tenjin Chuo-ku 810-8570 Fukuoka Fukuoka	
Company in charge of IC cards issuance, Electronic payments for	
YOKOHAMA SEASIDE LINE Co., Ltd. (株式会社横浜シーサイドライン)	
Supplier,	Ownership: Public/Private (3rd Sector)
URL <a href="http://www.seasideline.co.jp/">http://www.seasideline.co.jp/</a>	
Procurement: Japanese English:	
Address: YOKohama Kanagawa	
Operates one line majority owned by Yokohama City	
Fuji Heavy Industries Ltd (Subaru) (富士重工業株式会社)	
Supplier,	Ownership: Private
URL	
Procurement: Japanese English:	
Address:	

Japan Transport Engineering Company (J-TREC) (株式会社 総合車両製作所)	
Supplier,	Ownership: Private
URL <a href="https://www.j-trec.co.jp/eng/index.html">https://www.j-trec.co.jp/eng/index.html</a>	
Procurement: Japanese English:	
Address: Yokoyama Kanagawa	
JR EAST owned traincar maker	
Hitachi Ltd. (株式会社日立製作所)	
Supplier,	Ownership: Private
URL <a href="http://www.hitachi-rail.com/">http://www.hitachi-rail.com/</a>	
Procurement: Japanese English:	
Address: Akihabara Daibiru Building,18-13, Soto-Kanda, 1-chome, Chiyoda-ku 101-8618 Tokyo Tokyo	
Kawasaki Heavy Industries, Ltd. (川崎重工業株式会社)	
Supplier,	Ownership: Private
URL <a href="http://global.kawasaki.com/en/mobility/rail/index.html">http://global.kawasaki.com/en/mobility/rail/index.html</a>	
Procurement: Japanese English:	
Address: 1-14-5, Kaigan, Minato-ku 105-8315 Tokyo Tokyo	
NIIGATA TRANSYS Co., Ltd. (新潟トランス株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.niigata-transys.com/english/index.html">http://www.niigata-transys.com/english/index.html</a>	
Procurement: Japanese English:	
Address: 1-12-1,Yurakucho, Chiyoda-ku, 100-0006 Tokyo Tokyo	
NIPPON SHARYO, LTD. (日本車輛製造株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.n-sharyo.co.jp/index_e.html">http://www.n-sharyo.co.jp/index_e.html</a>	
Procurement: Japanese English:	
Address: 1-1, Sanbonmatsu-Cho, Atsuta-Ku 456-8691 Nagoya Aichi	
50.1% owned by JR Tokai	
The Kinki Sharyo Co.,Ltd. (近畿車輛株式会社)	
Supplier,	Ownership: Private
URL <a href="http://www.kinkisharyo.co.jp/e_index.htm">http://www.kinkisharyo.co.jp/e_index.htm</a>	
Procurement: Japanese English:	
Address: 2-2-46, Inada-Uemachi 577-8511 Higashi-Osaka City, Osaka	
30.4% owned by Kintetsu Corporation, 14.2% owned by Kintetsu's mother corporation Kintetsu Group Holdings, 5% JR West	
ALNA SHARYO COMPANY, LTD (アルナ車両株式会社)	
Supplier,	Ownership: Private
URL <a href="http://alna-sharyo.co.jp/index.html">http://alna-sharyo.co.jp/index.html</a>	
Procurement: Japanese English:	

Address: 1-2, Hankyu-Shoujaku 566-0013 Settsu Osaka	
Subsidiary of	
Kawasaki Heavy Industries Rolling Stock Company (川崎重工業車両カンパニー)	
Supplier,	Ownership: Private
URL <a href="http://www.khi.co.jp/rs/">http://www.khi.co.jp/rs/</a>	
Procurement: Japanese English:	
Address:	
Part of	
Mitsubishi Heavy Industries (三菱重工業株式会社)	
Supplier,	Ownership: Private
URL <a href="https://www.mhi.co.jp/products/transport_index.html">https://www.mhi.co.jp/products/transport_index.html</a>	
Procurement: Japanese <a href="https://www.mhi.co.jp/company/procurement/index.html">https://www.mhi.co.jp/company/procurement/index.html</a> English: <a href="http://www.mhi-global.com/company/procurement/index.html">http://www.mhi-global.com/company/procurement/index.html</a>	
Address:	

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