Strategic Market Creation Plan (Roadmap)

※ Setting envisioned society, index, and lifestyle to be achieved by 2030 in the four areas of health and longevity, energy, the next-generation infrastructure, and regional resources. Organizing long-term progress schedules of envisioned society around 2020 (intermediate stage) and development of measures in each strategic area by 2030.

Theme 1
Extending the nation’s “healthy life expectancy”

Theme 2
Realizing clean and economical energy demand and supply

Theme 3
Building safe, convenient and economical next-generation infrastructures

Theme 4
Building regional communities that use their unique local resources to appeal to the world
Theme 1
Extending the nation’s “healthy life expectancy”
Establish legal framework to develop an industry to extend healthy life expectancy

Establish “Next-Generation Health Care Industry Council (provisional name)”

Establish consulting system for companies that start business

Remove “gray zones”

Rulemaking to ensure quality for private services

In order to establish a new system concerning promotion of preventive care and health management,

(i) Develop and Implement “Data Health Plan (provisional name)” by all health insurance societies

(ii) Disseminate good practices

(iii) Analyze the effect of specified health guidance

Widely develop model initiatives concerning “Smart Life Project” and health promotion among citizens and employees

Increase the number of participant companies

Basic research and immunization research toward the realization of cancer prevention

Utilize data owned by the nation by a wide range of agents

Autonomous dissemination under the leadership of private sectors

Introduce an identification number system of medical information

Envisioned society to be achieved at an intermediate stage (around 2020)

Services under the cooperation between medical institutions and private companies will be purchased mainly by insurers and performance that contributes to health promotion for insured will be clarified.

Rules, etc. to be observed by companies which try to enter into the industry to extend healthy life expectancy will be clarified.

Satisfactory results will be achieved by local governments that promote local health by appropriate combination of health promotion and preventive care services by the industry to extend healthy life expectancy in addition to public insurance medical care.

<Develop an industry to extend healthy life expectancy by improving an environment such as laws and institutions, rules, etc.>

<Major issues>

- Clarify and raise awareness about advantages of addressing health promotion and preventive care of individuals, companies and local governments
- Enhance services outside insurance under the cooperation between medical institutions and companies

<Index> Develop an industry to extend healthy life expectancy

Lifestyle to be realized in an ideal society

People will get access to preventive care services in a way that effortlessly integrates into everyday life to avoid onset and aggravation of lifestyle-related diseases such as diabetes. Medically reliable prevention method will be established and people will get access to preventive care services concerning diet and exercise, etc. from reliable providers such as medical institutions as services with incunmery appropriate to Individual occupations and age so that everyone can prevent diseases.

<i>Improve the quality of medical care by using ICT</i>

<i>Extend healthy life expectancy, decrease the number of people with metabolic syndrome, and raise consultation rate of medical check-ups by improving a framework toward developing an industry to extend healthy life expectancy, etc.</i>

Goal for 2030
The society which can provide the world's most advanced necessary medical care by activating medicine-related industries

**Envisioned society to be achieved at an intermediate stage (around 2020)**
- We will realize the steady progress toward the goal of conquering cancer, incurable diseases, rare diseases, infectious diseases, dementia, etc., and R&D in Japan will lead the world.
- The safety system which also respond to new medical technologies including regenerative medical care will be established and operated and the power of brands will also be formed in global deployment of Japanese medical technologies and services.
- Portfolios of Japan's international health cooperation and international medical cooperation in business projects will be properly built mainly in emerging countries.

**The most advanced pharmaceuticals, medical devices, regenerative medical products**
- Establish the control tower function (Japanese version of NIH) in medical R&D (fulfilling the control tower function to connect (i), (ii), and (iii) integrally and organically)
  - (i) Establish the control tower headquarters in the Cabinet
  - (ii) Establish a core organization in charge of practical tasks for integrated research management
  - (iii) Build a system which ensures implementation of international standard high level clinical research and trials to apply research to clinical practice
- Improve the innovation evaluation method of new medical materials of pharmaceutical, medical device and their combinations
- Amend Pharmaceutical Affairs Act based on characteristics of regenerative medical care and medical devices
  - Establish an act for securing safety of regenerative medical care
  - Improve rational safety standards, etc. based on the actual situation of regenerative medical care
- Establish guidelines
- Enhance strategic consultation on pharmaceutical affairs in PMDA and systems for review and safety measures, and realize PMDA-WEST
- Build a new system (post “Super Special Zone (provisional name)” based on the achievements of Special Zone for State-of-the-art Medical Treatment
- Improve early-stage and exploratory clinical trial centers and clinical trials core hospitals
- Build a network to support drug discovery
- Improve trade balance of pharmaceuticals and medical devices
- Increase the number of regenerative medical products which move into clinical research and trials and that of new regenerative medical products to world top level by 2030 in the regenerative medical care industry
- Expand overseas market size of Japanese medical technologies and services to 5 trillion yen

**Global outreach of medical market**
- Promote business-based global deployment of medical technologies and services by integrated promotion organization, Medical Excellence Japan
- Promote R&D and support supply of pharmaceuticals for emerging countries under the cooperation between the public and private sectors
- Establish around 10 Japanese medical centers by 2020, with focus on emerging countries
- Promote about 50 by 2030
The society where people who are out of work due to illness or injury can return to work as quickly as possible by access to better medical care and nursing care

**Envisioned society to be achieved at an intermediate stage (around 2020)**
- People will receive services for medical care, nursing care, and livelihood support at home comfortably by improving an environment for cooperation between the public sector and private businesses in communities (establishment of guidelines for information sharing and coordination using ICT)
- The development of care support equipment which significantly contributes to self-support for the elderly and the disabled will be advanced and the equipment will be diffused to consumers at a reasonable cost by utilizing lease arrangement

**Major Issues**
- Enhance services outside insurance by ICT technology, application of digital devices, and cooperation between medical institutions and companies
- Diffuse cheap and user-friendly nursing care equipment
- Develop houses and communities where people have secure life

**Index**
- Diffuse nursing care equipment and realize “Smart Wellness Housing and City”

**Lifestyle to be realized in an ideal society**
- Life where necessary medical care will be accessible within a reasonable time by sharing information for medical care and nursing care according to characteristics of social communities and various livelihood support services, etc. will be available at hand. A wide range of generations including the elderly will interact with each other in communities and are able to live a healthy life without anxiety.

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**Develop nursing care robots**
- Promote “Five-year Project for Promotion of Self-Support and Reduction of Care Burden by Nursing Care Robots”
- Conduct contests
- Establish the safety standard for lifestyle support robots (nursing care robots, etc.)
  - Start domestic certification in compliance with international standards
- Conclusion of intergovernmental promises on robot research
  - Implement international joint research of robots
- Promote development of devices using robot technology which helps self-support and life for the disabled

**Provide services for nursing care and lifestyle support (Strengthen the system)**
- Enhance transparency by promoting publication of financial statements of social welfare corporations, establish systems for upgrading management, “Visualize” nursing care and medicine-related information
- Stable supply of nursing care services
- Secure services for various medical care, nursing care and lifestyle support
- Create and enhance next-generation housing and community planning industries
- Continuously expand the market size of distribution and remodeling of used houses

**Promote housing and community planning for the elderly**
- Improve housing with care services for the elderly and aggregate their bases for living
- Watch over the elderly, etc. by using ICT and enhance livelihood support
- Aggregate houses, medical care, welfare, etc. in downtown
- Consider areas and methods for conducting pioneering projects and implement them
- Promote distribution of real estates and effectively use them
- Enhance public transportation by role sharing and agreement of parties concerned
- Diffuse transportation and movement system by using ultra-compact mobility

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**Present**
- Domestic market size for nursing care robots is 260 billion yen (in 2030)
- Secure services for various medical care, nursing care and lifestyle support
- Create and enhance next-generation housing and community planning industries
- Continuously expand the market size of distribution and remodeling of used houses

**Goal for 2030**
- Realize “Smart Wellness Housing and City”
  - Ratio of the number of houses for the elderly to elderly population: 0.9% (in 2005) → 3.5% (in 2020)
  - Percentage of public rental housing estate (with more than 100 households) with livelihood support facilities: 16% (in 2009) → 25% (in 2020)
  - Barrier free houses in urban rental housing: About 340 thousand households (at the end of FY 2012) → About 400 thousand households (at the end of FY 2018)
  - Double the market size for distribution and remodeling of used houses: About 10 trillion yen (in 2013) → About 20 trillion yen (in 2020)
Theme 2
Realizing clean and economical energy demand and supply
Realizing clean and economical energy demand and supply

**Envisioned society to be achieved at an intermediate stage (around 2020)**

- Next-generation energy sources are practically realized one by one such as next-generation highly efficient thermal power (IGCC, etc.), offshore floating wind power generation to support future low cost and clean energy generation.
- On top of FIT, the foundation for full-fledged dissemination of clean energy toward 2030 including streamlining the procedure of environmental impact assessments, regulatory and institutional reform, expansion of transmission network, etc. has been built.
- Although there are still some challenges to overcome to realize commercialization, element technologies with potential to be core technologies which will be one of future energy have been established one by one.

**< Highly efficient thermal power >**

- **Global market size**
- **Highly efficient thermal power**
  - 217 trillion yen (2012 - 2035): Cumulative investment
  - (Source: IEA (World Energy Outlook 2012))

- **< Major issues >**
- Fuel cost of thermal power generation has drastically increased due to increased use of old thermal plants
- Introduction of renewable energy is still at low level
- Considerable time is necessary to realize practical use of energy which can support future

**< Renewable energy >**

- **Global market size**
- **WIND**: 170 trillion yen (2012 - 2035): Cumulative investment
  - (Source: IEA (World Energy Outlook 2012))
- **SOLAR**: 101 trillion yen (2012 - 2035): Cumulative investment
  - (Source: IEA (World Energy Outlook 2012))
- **GEOThermal**: 8 trillion yen (2012 - 2035: Cumulative investment)
  - (Source: IEA (World Energy Outlook 2012))

- **< Energy technologies with potential to support future >**
- Promote technological development initiated by private sector
- Support commercialization of marine energy such as wave power, tidal current, etc. through measures such as technological development, development of demonstration field, initiation of demonstration tests
- Establish next-generation marine resource development technology through R&D of exploration and production technologies, etc.
- Complete demonstration test for 500kW power transmission/recognition on the earth for space solar energy and promote preparation for demonstration test in space
- Promote development of innovative technologies which contribute to battle against global warming such as innovative catalyst that can convert CO2, etc. to useful materials such as new materials of plastics
- Promote advancement of production, transport, storage technologies, etc., of hydrogen whose unused heat is expected to be useful for utilization, thermal storage, insulation technology and active use

**Goal for 2030**

- Try to practically realize IGFC which incorporates fuel cells into coal thermal power generation to improve generating efficiency of coal thermal power generation from around 39% to around 55% to initiate implementation
- Commercialize the world's first offshore floating wind power generation (by around 2018) and create global market
- Reduce power generation cost, which is 30 yen/kWh or more currently, to be one third or less, i.e. less than 7 yen/kWh after 2030
- Capture 70% global market by turbines
- Develop technology for commercialization of methane hydrate by around fiscal year 2018
- Have clear perspective for commercialization of other future energy technologies

< Highly efficient thermal power >

- **Global market size**
- **Highly efficient thermal power**
  - 217 trillion yen (2012 - 2035): Cumulative investment
  - (Source: IEA (World Energy Outlook 2012))

- **< Major issues >**
  - Increased use of old thermal plants
  - Introduction of renewable energy is still at low level
  - Considerable time is necessary to realize practical use of energy which can support future

- **Global market size**
  - Coal: 217 trillion yen (2012 - 2035): Cumulative investment
  - (Source: IEA (World Energy Outlook 2012))
  - LNG: 217 trillion yen (2012 - 2035): Cumulative investment
  - (Source: IEA (World Energy Outlook 2012))
  - USC (Ultra-supercritical thermal power generation: generating efficiency around 39%)
  - (Practical realization done)
  - IGCC (Integrated coal gasification combined cycle: generating efficiency around 46%)
  - (Practical realization done)
  - IGFC (Integrated coal cell combined cycle: generating efficiency around 54%)
  - (Practical realization done)
  - IGFC (Integrated coal cell combined cycle: generating efficiency around 57%)
  - (Practical realization done)
  - IGFC practical realization
  - 1,500 °C class (generating efficiency around 46%) => Promote implementation and export
  - 1,600 °C class (generating efficiency around 54%) => Promote implementation and export
  - 1,700 °C class (generating efficiency around 57%) => Promote implementation and export

- **< Energy technologies with potential to support future >**
  - **Promote technological development initiated by private sector**
  - Support commercialization of marine energy such as wave power, tidal current, etc. through measures such as technological development, development of demonstration field, initiation of demonstration tests
  - Establish next-generation marine resource development technology through R&D of exploration and production technologies, etc.
  - Complete demonstration test for 500kW power transmission/recognition on the earth for space solar energy and promote preparation for demonstration test in space
  - Promote development of innovative technologies which contribute to battle against global warming such as innovative catalyst that can convert CO2, etc. to useful materials such as new materials of plastics
  - Promote advancement of production, transport, storage technologies, etc., of hydrogen whose unused heat is expected to be useful for utilization, thermal storage, insulation technology and active use
**Envisioned society to be achieved at an intermediate stage (around 2020)**

- Peripheral service for household is created one after another by electricity deregulation.
- Households and individuals can select electricity company. Rate menu can be selected as well.
- Diverse players participate in energy supply and control including consumers, also integration of various industries (electricity, gas communications, etc.) is promoted.
- Dissemination of storage batteries which are commonly combined with renewable energy, excess energy is stored, and can be utilized during night-time and in case of outage.
- Development of next-generation device, parts and materials makes progress, and they are incorporated into every point from production, distribution and consumption, so that energy is efficiently used.

**Promote introduction of large grid storage batteries through R&D, demonstration, etc.**
- Promote introduction of fuel cell vehicles through regulatory and institutional reform related to hydrogen refueling stations that supply fuel to such vehicles.
- Support for establishing Japan’s initial market of stationary storage batteries, at the same time, through acquiring international standards according to Japan-originated safety standard (JIS), promote capturing global market.

**Disseminate smart meters that form infrastructure (details are described later)**
- New players appear
- Diverse rate menus
- Technical development and dissemination of power electronics
  - Enhance FC (frequency conversion facilities) (present: 1,200,00 kW) ⇒ Enhance up to 2,100,000 kW (toward 3,000,000 kW as early as possible)
  - Enhance Hokkaido–Hokuriku linkage facilities (present: 600,000 kW) ⇒ Enhance up to 900,000 kW
- Academic development and dissemination of power electronics
  - Enhance up to 900,000 kW
- New players appear

**Storage batteries**

**Global market size**
- Storage batteries: 1 trillion yen (present) ⇒ 20 trillion yen (2020)

**Disseminate smart meters that form infrastructure (details are described later)**
- 1st amendment (2013 Ordinary Diet session) → Establishment of the Coordination of Transmission Operators
- 2nd amendment (2014 Ordinary Diet session) → Full liberalization of entry to electricity retail business
- 3rd amendment (Aims to submit in 2015 Ordinary Diet session) → Abolishment of the regulations on retail electricity rates

**Streamline energy distribution and establish growth base (Electricity System Reform)**

- New players appear
- Diverse rate menus
- The Organization for Nationwide Coordination of Transmission Operators (by around 2015)
- Full liberalization of power generation and electricity retail business (by around 2016)
- Make transmission network available for everybody freely (neutralize power-grids), abolishment of the regulations on retail electricity rates prices (by around 2018 to 2020)

**Global market size**
- Power electronics: 6 trillion yen (present) ⇒ 20 trillion yen (2030)

**Aims to fully commercialize next-generation power electronics using new materials, etc. by 2020**
Envisioned society to be achieved at an intermediate stage (around 2020)

- Electrical equipment incorporating the latest electronic technology is widely and commonly used. More smart meters are used, which makes it easy to manage energy through networking of electrical equipment.
- Dissemination of electric vehicles is accelerated. 50% of next-generation automobiles to total new car sale.
- Integrated use of electricity and heat is widely recognized. 1.4 million residential fuel cells are used in 2020.
- By phased obligation to comply with energy-saving standards, energy-saving housing and buildings become common (100% of new houses and buildings comply with energy-saving standards).

< Energy management system >
Global market size Investment on energy-saving (incl. Energy management system)
14 trillion yen (present) => 50 trillion yen (2035) (Source: IEA (World Energy Outlook 2012))

- Disseminate smart meters as the infrastructure
  - Implement measurement and test system
  - Promote full-fledged implementation by electricity companies, etc.
- Disseminate HEMS, BEMS, MEMS, etc.
- In accordance with diverse rate menus (aforementioned), etc. start full dissemination of HEMS, BEMS, MEMS, etc.
- Consider privacy policies in anticipation of new services utilizing electricity use data, etc.

< Next-generation automobiles >
Global market size 3 trillion yen (present) => 35 trillion yen (2020)

- Create initial demand by supporting for introduction of EV, PHV and CDV
- Promote international standardization of batteries and charger controller, etc.
- Provide 100,000 chargers
- Introduce fuel cell vehicles to the market and install hydrogen refueling stations in advance (100 stations focusing on 4 metropolitan areas)

< Energy-saving technologies such as fuel cells and energy-saving appliances >
Global market size Fuel cells: 0.2 trillion yen (present) => 1.1 trillion yen (2020)
Energy-saving investment: 14 trillion yen (present) => 50 trillion yen (2035) (Source: IEA (World Energy Outlook 2012))

- Support for introduction of residential fuel cells (ENE-FARM)
  - Expand self-reliant dissemination
- Through technological development (reducing use of platinum in catalyst), standardization, etc., promote domestic implementation, at the same time, support global deployment to Europe, Korea, etc.
- Enhance application of the top-runner system
  - EcoCute (electric water heater), combined machines and printers (added in March this year)
  - LED bulbs (to be added by this summer)
  - Amend Energy Saving Act targeting construction materials (insulators, windows, etc.)
  - Promptly add as target
- Phased obligation to comply with energy-saving standards of housing and buildings by 2020 (large size: 2,000m² or larger, medium size: 300 ~ 2,000m², small size: less than 300m²)
- Large size
- Medium size
- Small size
- Support global deployment of energy-saving technologies
  - Establish a system which makes our advantageous energy-saving technologies appropriately evaluated
  - By disseminating our energy-saving technologies during the development period of emerging countries such as Asian countries, contribute to overcoming energy constraints in such countries

Goal for 2030

- Smart meters are implemented to all households and factories throughout the nation and HEMS, BEMS, MEMS, etc. are introduced in a standard manner (Japan becomes a smart society)
- 50 ~ 70% of next-generation automobiles to total new car sale
- 5.3 million (about 10% of Japan's entire households) residential fuel cells in the market
- 100% compliance with energy-saving standards of new houses and buildings (by around 2020)
- (Houses) on average, new houses in 2030 comply with ZEH
- (Buildings) on average, new buildings in 2030 comply with ZEB

A society where energy is consumed wisely
Theme 3
Building safe, convenient and economical next-generation infrastructures
A society where safe and resilient infrastructures are provided at low cost

**Envisioned society to be achieved at an intermediate stage (around 2020)**
- Highly efficient inspection, maintenance and repair using sensors, robots, non-destructive testing technique, etc. are applied to 20% of domestic important infrastructures and aging infrastructures
- 30% global markets is captured for sensors, robots, etc. for inspection, maintenance and repair
- Goal for practical realization of new materials such as self-restoring materials becomes clear

**Basic plan for longer life of infrastructures**

- Formulate basic plan for longer life of infrastructures (basic policy) (Targets, roadmap, roles of the government and local governments, academic-industrial alliance, etc.)
- Formulate plan for longer life of infrastructures (action plans) (implements full check, review for management criteria, formulates facility-specific plan, develop new technologies, implement demonstration tests, etc.)

**Infrastructure inspection and diagnostics systems**

<table>
<thead>
<tr>
<th>Global market size</th>
<th>Sensors: 0.5 trillion yen (present) =&gt; 10 trillion yen (2030) / robots: 5 billion yen (present) =&gt; 2 trillion yen (2030)</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Monitoring: 0 yen (present) =&gt; 20 trillion yen (2030)</td>
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</table>

- Digits infrastructure information (basic information, inspection, maintenance and repair information) and integrate with geospatial information
- Install various sensors to infrastructures
- Develop new inspection, maintenance and repair techniques using sensors, robots, etc.
- Overseas survey by public and private sectors, building connection

**New materials**

| Global market size | Self-restoring materials, etc.: 0 yen (present) => 30 trillion yen (2030) |

- R&D for new materials such as self-restoring materials under collaboration of the related ministries and agencies => Promote use of new materials such as self-restoring materials (including adoption by government procurement)

**Space infrastructure (quasi-zenith satellite and remote sensing satellite)**

<table>
<thead>
<tr>
<th>Global market size</th>
<th>Market size of satellite data: 0.1 trillion yen (present) =&gt; 1.6 trillion yen (2030)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Market for satellite positioning: 11 trillion yen (2005) =&gt; 29 trillion yen (2030)</td>
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</tbody>
</table>

- Quasi-zenith satellite [1-satellite system] => [4-satellite system] => [Targeting 7-satellite system] => Remote sensing (examine optimal configuration and maintain and operate several satellites in an integrated manner)
- Use domestic data => Promote use of positioning data in Asia-Pacific region (realize a society where geospatial data are used in an advanced manner)

**Goal for 2030**

- Topper benchmark significant improvement
- R&D for new materials such as self-restoring materials under collaboration of the related ministries and agencies
- Promote use of new materials such as self-restoring materials (including adoption by government procurement)
- Capture 30% of global markets of sensors, robots, etc. for inspection, maintenance and repair
A society where people and goods are provided with safe and convenient transportation

**Envisioned society to be achieved at an intermediate stage (around 2020)**

- 20% of domestic vehicles (stock-based) have driving safety support devices/systems. 30% global market is captured.
- Public and private various information effective to control congestion or traffic accidents are started to be integrated and utilized.
- Accurate grasping of position information of cargos is available.

**Driving safety support devices and systems, self-driving systems**

| Global market size | Driving safety support devices and systems: 0.5 trillion yen (present) => 20 trillion yen (2030) |

**Congestion control**

| Global market size | Congestion information provision and prediction systems (navigation system, etc.): 2 trillion yen (present) => 30 trillion yen (2030) |

**Advancing distribution systems**

| Global market size | Promote acceleration and paperless of trade-related procedures, etc., by NACCS |

**Goal for 2030**

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- Various public and private information effective for congestion control, etc. is integrated and used.
- Advanced distribution systems without loss
- Make distribution systems of our country more efficient

**Major issues**

- Social implementation of new technologies that supplement declined physical performance or cognitive function of the elderly such as reaction speed.
- Seamless distribution system to cope with expanding economic activities to Asian region.
- A secure life in which traffic accidents are reduced drastically and no traffic accident.
- Congestions are reduced drastically and people and goods are transported smoothly.
- Distribution service is provided at cost and speed that does not make users be conscious of distance and time.
Theme 4
Building regional communities that use their unique local resources to appeal to the world
- **Consolidation of farmland to motivated entities (strengthening production)**
  - **Ratio of farmland used by motivated entities**
    - Increase ratio of farmland to motivated entities
    - Verify, existence of a corporate entity that can absorb farmland
    - Develop farmland into a high-value-added product

- **Export, overseas deployment strategies, etc. (Expand frontiers)**
  - **Export of agricultural, forestry and fishery products and food produce**
    - Approx. 450 trillion yen (2021) => 1 trillion yen (2020)

- **AFinnovation** (the sixth industry), cross-industrial collaboration, etc.
  - **Market size of AFinnovation** (the sixth industry)

- **Forestry and fishery industries**
  - **Present**
    - Use renewable energy in rural areas
    - Promote function advancement of agriculture, forestry and fishery products and advancements of production and distribution systems
  - **2017**
    - Promote function advancement of agriculture, forestry and fishery and advancement of production and distribution systems
  - **2020**
    - Establish a new demand for wood products
    - Increase demand for wood products
  - **2030**
    - Cross-industrial collaboration is activated and attractive businesses utilizing agriculture, forestry and fishery products expanded in many areas with total value exceeding 10 trillion yen

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**Envisioned society to be achieved at an intermediate stage (around 2020)**

- Consolidation of farmland to motivated entities is realized.
- Productivity improvement of farmland exceeds production cost.
- Through strategic cross-industry partnerships, the efficiency of agriculture is maximized.
- Under market-and innovation-driven agriculture grows as an export industry.
- Export of agricultural, forestry and fishery products and food produce is 1 trillion yen.”

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**Goals for 2030**

- Product-out mindset to produce goods
- Rich agriculture, forestry and fishery products and food produce are not used actively

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**Cross-industrial collaboration is activated and attractive businesses utilizing agriculture, forestry and fishery products expanded in many areas with total value exceeding 10 trillion yen**
A society which makes use of potential such as tourism resources to invite many world’s tourists to regional communities

**Envisioned society to be achieved at an intermediate stage (around 2020)**

- Many people visit Japan from all over the world (aims to receive 25 million foreign visitors in 2020).
- Foreign visitors visit any place all over the nation.
- Japan is a central nation to publicize information on sports and culture.
- Humans and investment are concentrated and Japan becomes an Asian top host nation of international conferences.

**Major issues**

- Potentials of tourism resources including rich cultural heritage and natural environment are not fully utilized.

**Index: Receive 30 million foreign visitors in 2030**

- Create Japan Boom by penetrating Japan brand and invite visitors to Japan, "heaven on earth"
- Expand direct inter-regional exchange with Asian countries
- Realize an environment where foreign visitors can move and stay without stress
- Increase foreign visitors who can enjoy marathon, bike riding, etc.
- Create business innovation by concentrating world’s intelligence through international conferences

**Cross-sectional planning and implementation of Visit Japan Promotion by relevant ministries, agencies and institutions**

- Create a scheme to publicize Japan brand under governmental integrated efforts by this summer
- Related ministries, agencies and private companies will jointly promote continuous publicizing of content overseas for improvement of Japan brand
- Create a multi-year plan to publicize content overseas
- Improve tourism environment such as relaxing visa requirements and making entry procedures faster
  - Relax visa requirements for some ASEAN nation tourists by this summer
  - Consider implementation of a system which allows foreigners who meet certain conditions to stay for an extended period
  - Promote regularly updated visa provision system
  - Enhance airline networks and develop the use environment for business jets
- Improve environment for foreign visitors to stay in Japan
  - Create common guidelines for information boards and multilingual signs from a foreigner’s viewpoint within this year
  - Consider the construction of the infrastructure that connects the Tokyo city center and capital area airports directly
  - Create a system in which overseas deployment of travel resources will be supported by JNTO
  - Establish a certification system for tourist areas and foster new business to support these processes and create new tourists areas based on novel ideas
- Improve tourism environment such as relaxing visa requirements and making entry procedures faster
  - Take necessary measures toward relaxing visa requirements by taking into consideration the situations of neighboring nations
  - Promote speedy and smooth entry procedures
- Improve tourism environment such as relaxing visa requirements and making entry procedures faster
- Enhance environment for foreign visitors to stay in Japan
  - Increase and publicize attraction of tourist areas and foster new business to support these processes and create new tourist areas based on novel ideas
  - Disseminate information on new tourism by conducting model projects, etc.
- Establish a certification system for tour operators
- Decide on a concrete policy to introduce an accommodation information provision system within this fiscal year
- Take into consideration the convenience of foreign visitors as well as the perspective on enforcement, the tax free system for consumption tax for foreign visitors will be reviewed in the process of request for tax revisions including a possible revision of the system
- Select and support "Global MICE strategic city" which has world top class promotion capability, system and receiving environment
- Create and reinforce the framework to attract more international conferences, etc. (MICE)
  - Invite conferences targeting national and cities’ growth fields and reinforce city functions as an attractive hosting venue
  - Build collaboration with industry, universities, etc., and promote invitations from the viewpoint of all-Japan
  - Develop unique venues, promote their use, activate events
  - Promote concrete collaboration
  - Actively host symbolic international events, powerfully publicize the state of Japan as an event powerhouse and advanced nation for international exchange to overseas countries

**Achieve 30 million foreign visitors**

- To be a top-class country in Asia in terms of tourism receipts

**Approx. one in six overnight guests is a foreign visitor**

**Establish Japan’s position as an Asian top host nation of international conferences**