

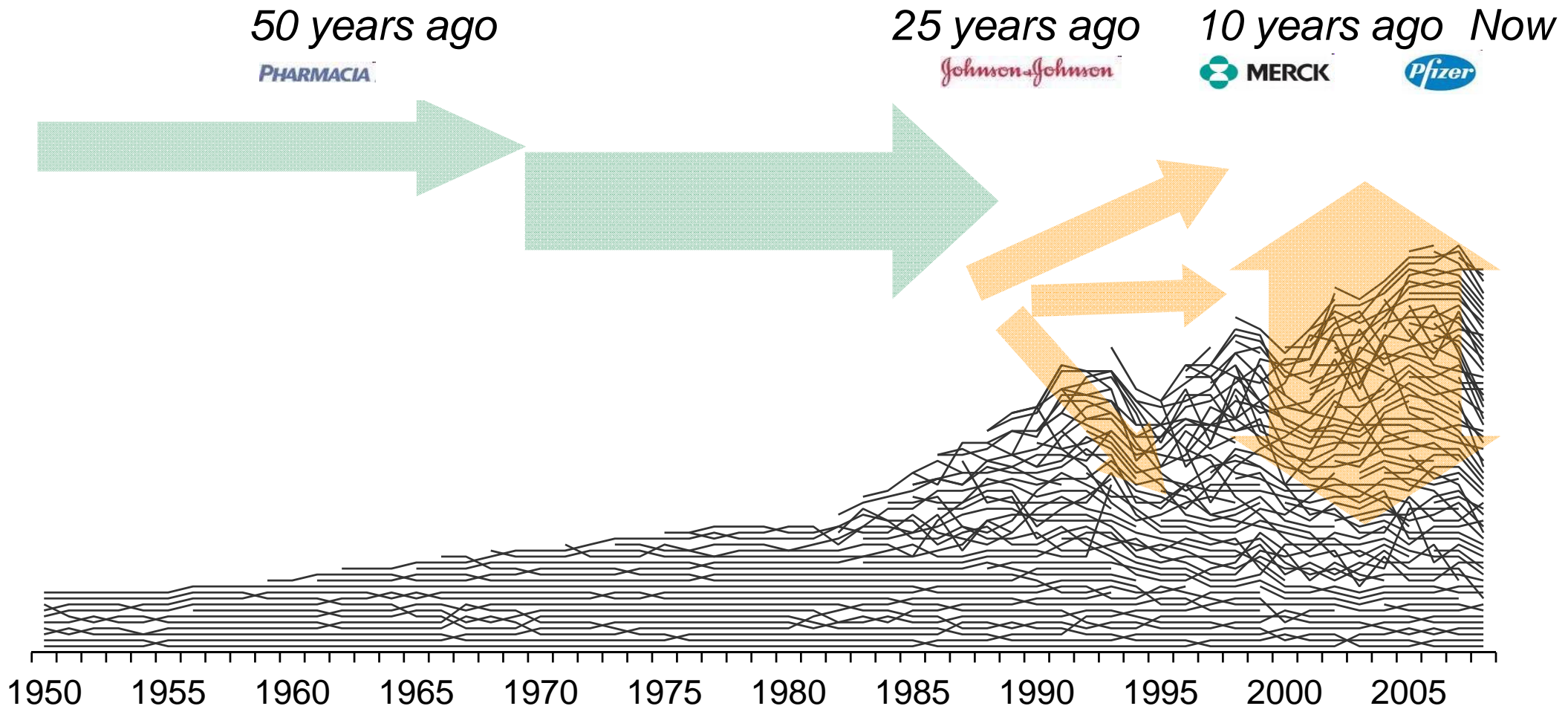
Chances for Small to Medium-Sized Enterprises

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Special Advisor to the Minister
Ministry of Internal Affairs and Communications, Japan

Bigger Not Necessarily Better

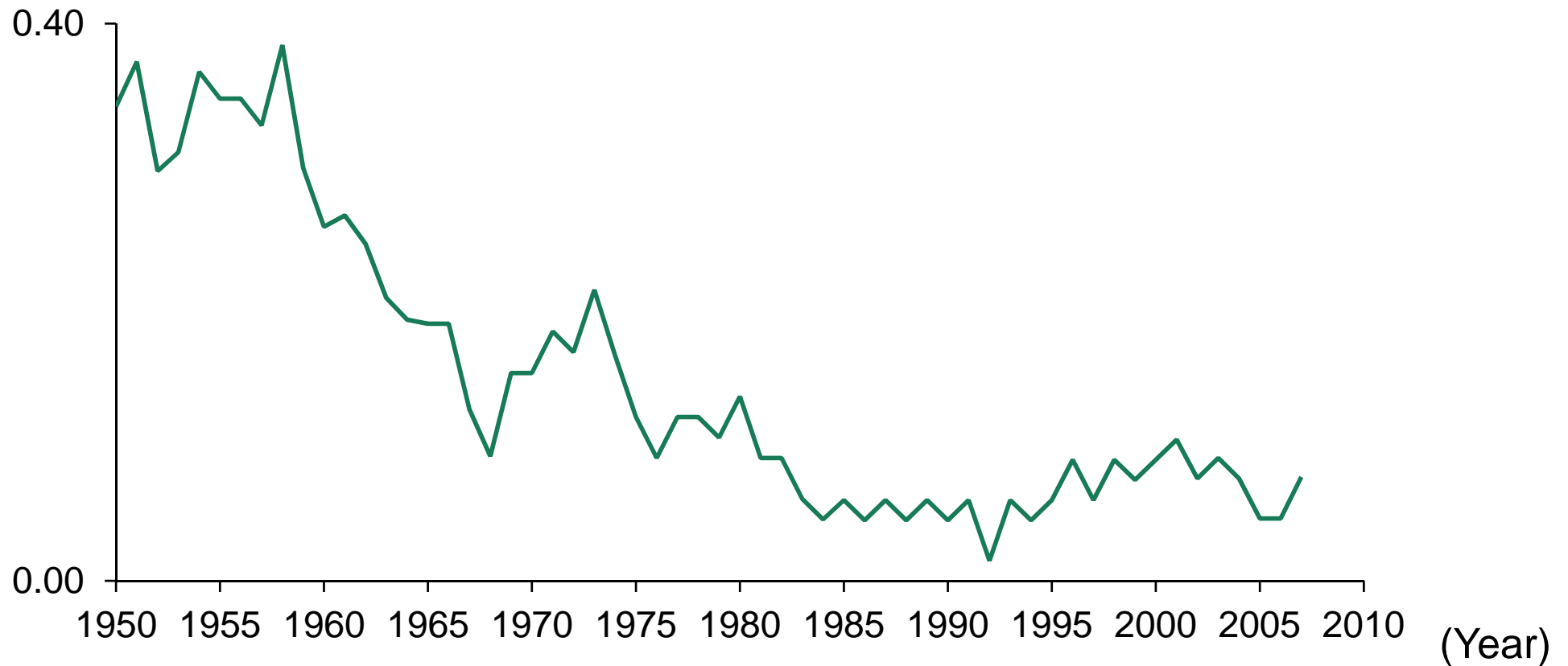
Change of revenue ranking in Pharma industry



Note: Publicly listed companies in S&P 500 from 1955-2008; total 107 companies labeled under "Pharmaceutical" CICS code. Lines ordered by ranking of net sales
Source: BCG analysis

Bigger Not Necessarily Better

Probability of top revenue company being most profitable, US stock market



Source: BCG; U.S. stock exchange data

EPIC 2014 (Googlezon)

A very famous flash movie was created in 2004.



- It predicted Googlezon would dominate media industry.

- In reality, it is expanding beyond media – automotive, logistics, houses, etc.

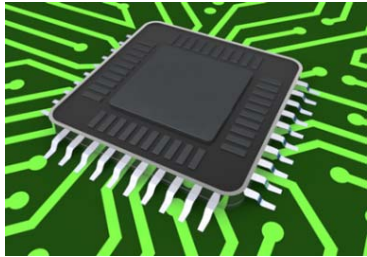


Google car



Drone

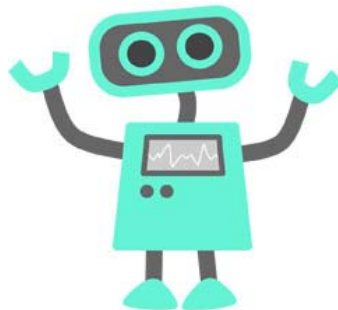
Industry Cluster in Japan: Fukuoka



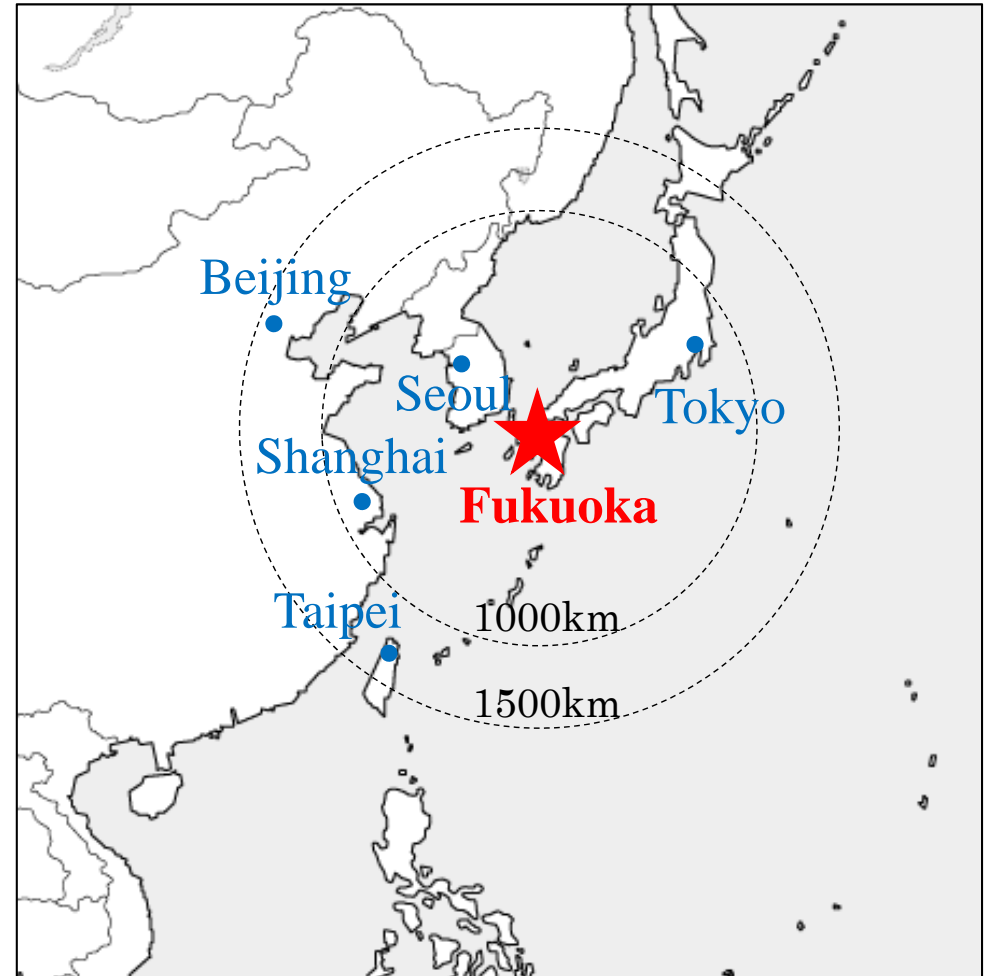
Semiconductor



Automotive



Robot

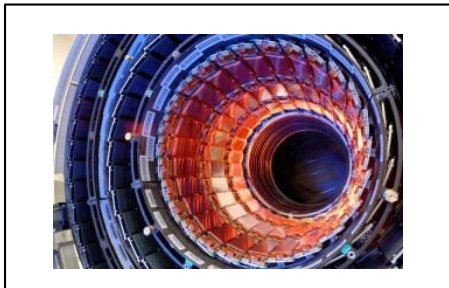


Fukuoka is a hub of the East Asia.

Industry Cluster in Japan: SENA



Automotive



Photonics



Aerospace



Medical equipment

SENA: San-En-Nanshin-Area



SENA is located in the center of Japan.

Window of Opportunity

- Japan government aims to revitalize local economies and accelerate innovation in key areas including smart city, healthcare, robotics, agriculture, education, etc.
- It secured the budget of 10 billion euro in FY2015.
- The program is running for 5 years. A window of opportunity for SMEs to start businesses in Japan is wide opening.