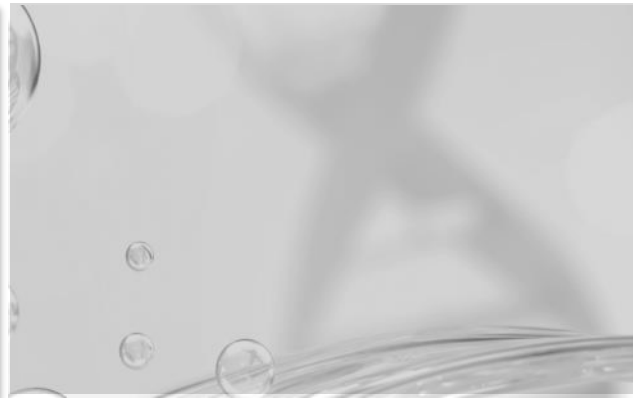


# Japan's Bioeconomy Strategy and Greater Tokyo Biocommunity



**Prof. Yoshiaki Tsukamoto**  
**Executive Director, Japan Bioindustry Association**  
**Secretary General, Greater Tokyo Biocommunity**

# Distribution of **Nobel Prize Laureates** by Country (from 2000 to 2022)

	<b>USA</b>	<b>75</b>
	<b>United Kingdom</b>	<b>24</b>
	<b>Japan</b>	<b>20</b>
	<b>Germany</b>	<b>13</b>
	<b>France</b>	<b>10</b>
	<b>Israel</b>	<b>6</b>
	<b>Canada</b>	<b>4</b>
	<b>Russia</b>	<b>4</b>
	<b>Switzerland</b>	<b>4</b>
	<b>Australia</b>	<b>3</b>
	<b>Italy</b>	<b>3</b>
	<b>Norway</b>	<b>2</b>
	<b>Sweden</b>	<b>2</b>
<b>Ireland, China, Turkey, Belgium, Netherlands, Denmark, Austria</b>		
<b>New Zealand</b>	<b>1 each</b>	

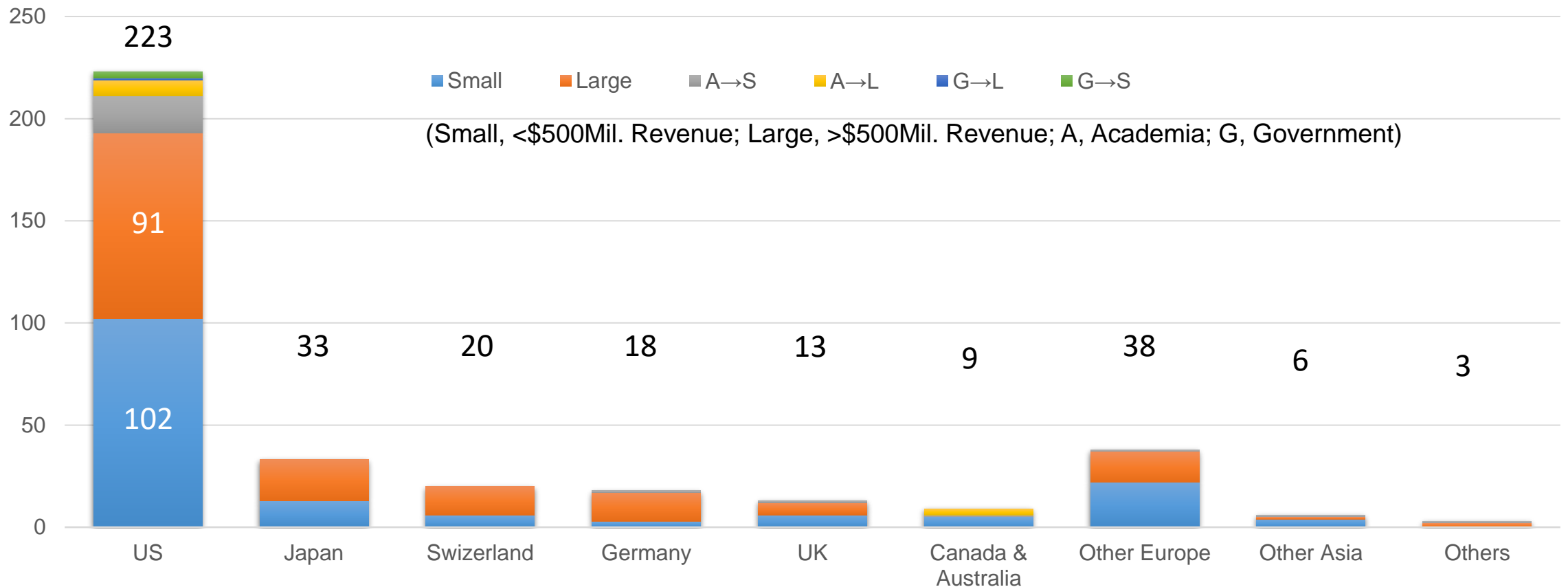


\*Total number of three fields;  
[Physics, Chemistry, and Physiology or Medicine]

Counted by JBA based on the information on Nobel Prize.org

# Pharmaceutical Approvals by Geographic Location & Type of IP Originator 2011~2020 (N=363)

Japan occupies the second place as the country with the highest number of FDA-approved pharmaceutical products.



# The Top 100 Science & Technology Cluster 2022

## IPs & Publications

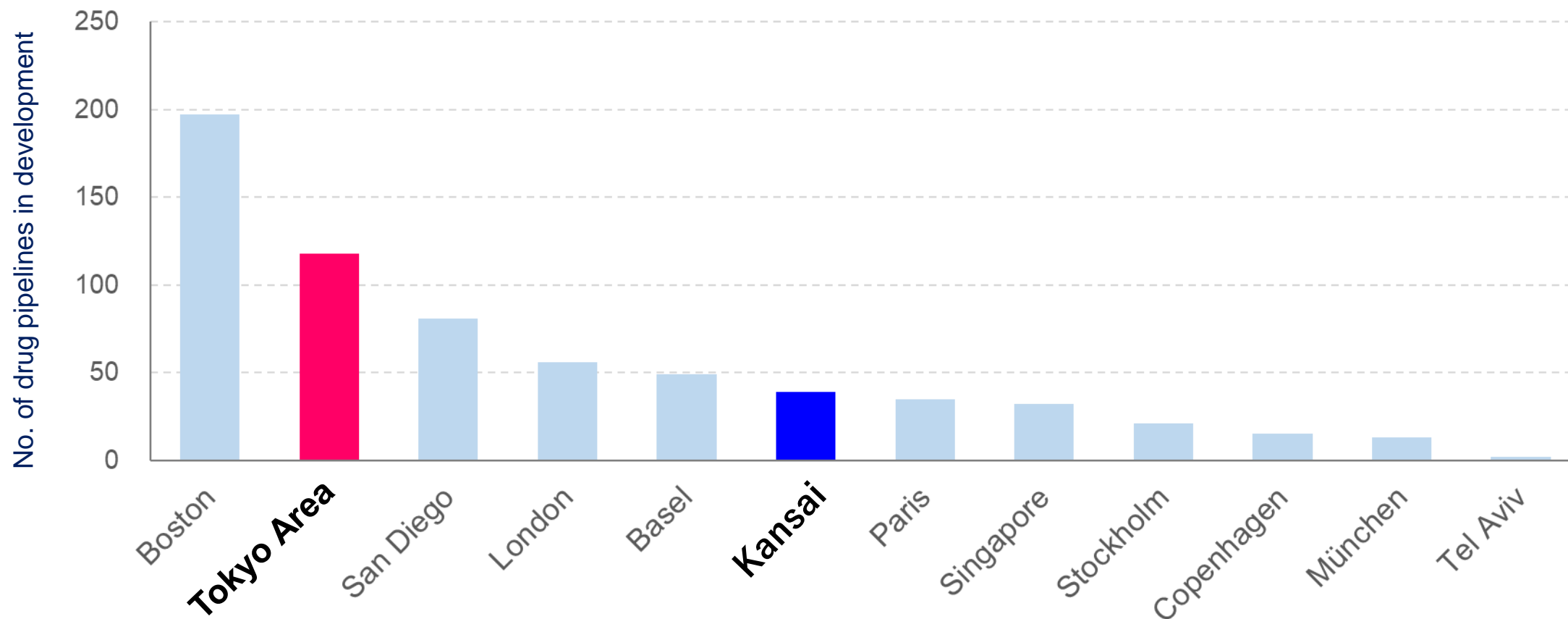
(only Top 10 were shown)

Rank	Cluster	Country	Share of total PCT filings <sup>*1</sup> (%)	Share of total publications <sup>*2</sup> (%)	Total (%)
1	Tokyo-Yokohama	Japan	10.7	1.6	12.3
2	Shenzhen-Hong Kong-Guangzhou	China/Hong Kong	8.2	1.9	10.1
3	Beijing	China	2.8	3.7	6.5
4	Seoul	Korea	4.0	1.8	5.8
5	San Jose-San Francisco	US	3.7	0.8	4.6
6	Shanghai-Suzhou	China	2.0	2.1	4.1
7	Osaka-Kobe-Kyoto	Japan	3.0	0.7	3.7
8	Boston-Cambridge	US	1.4	1.0	2.4
9	New York City	US	1.1	1.0	2.2
10	Paris	France	1.2	0.9	2.1

\*1. Inventors listed in patent applications under WIPO's Patent Cooperation Treaty (PCT), spanning years 2016 to 2020

\*2. Authors listed in scientific publications in the Web of Science's Science Citation Index Expanded (SCIE) and covering the same period.  
From WIPO "Global Innovation Index 2022"

# Drug Pipelines in Development in 2021



Bio-related drug pipelines in the developmental stages from preclinical to Phase III were counted (as of the end of 2021).

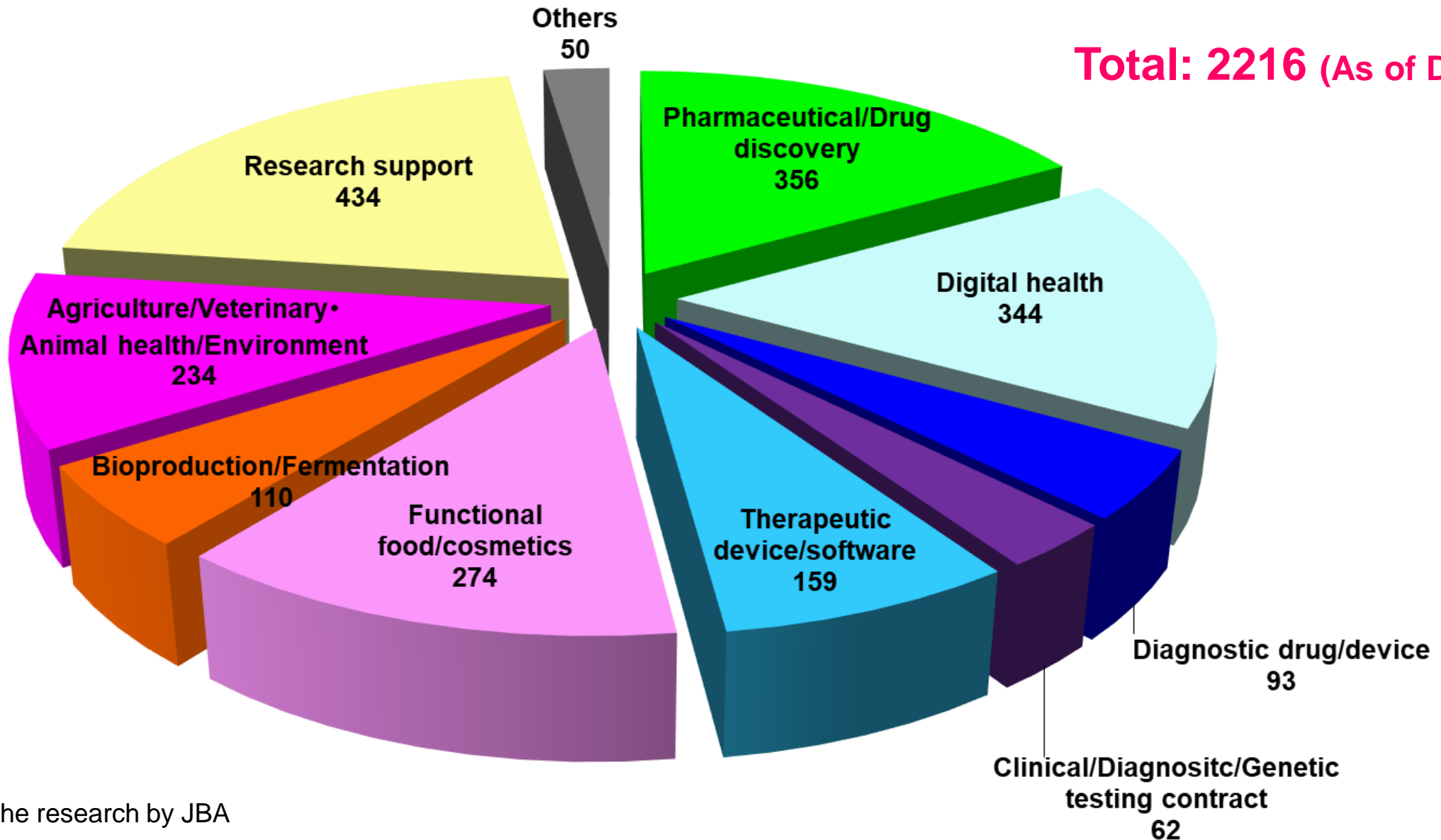
Data searched with BioMedTracker and “Asu-no-sinyaku” by Deloitte Tohmatsu

# Startup Ecosystem Ranking 2021 (Life Science)

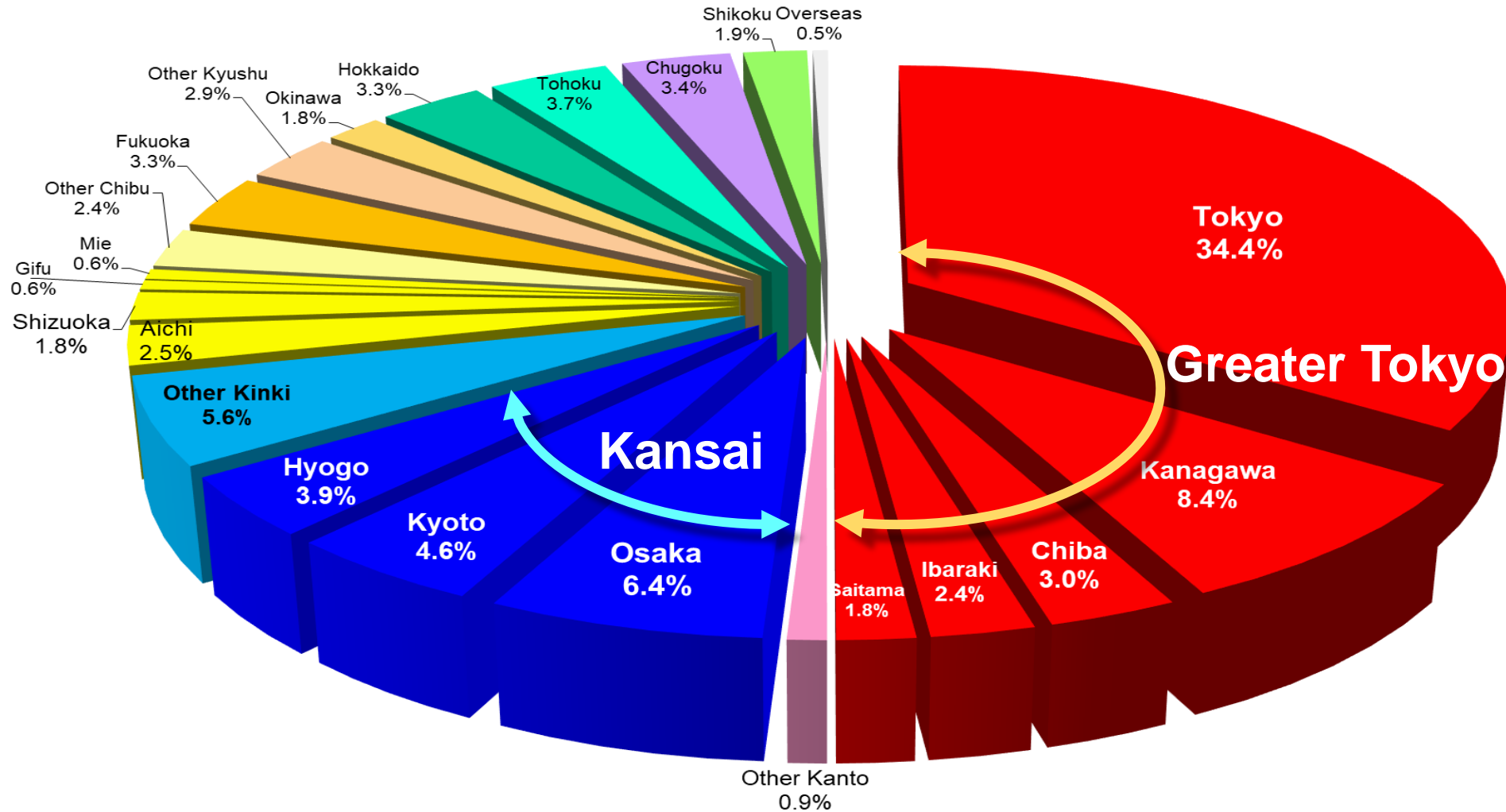
	Ranking	Performance	Funding	Knowledge	Talent	Infrastructure	Policy
Silicon Valley	#1	10	10	10	10	10	10
Boston	#2	10	10	8	9	10	10
New York City	#3	10	10	8	7	10	10
London	#4	9	10	7	10	10	6
San Diego	#5	10	9	8	4	9	10
Los Angeles	#6	7	7	8	8	8	10
Washington DC	#7	8	8	7	4	8	10
Philadelphia	#8	9	8	5	5	7	10
Shanghai	#9	9	9	10	5	4	4
Research Triangle	#10	8	6	4	9	5	10
⋮	⋮				⋮		
Tokyo	#25	2	7	9	1	3	6

# No. of Japanese Biotech Startups

**Total: 2216 (As of Dec., 2021)**



# Location of Japanese Biotech Startups



**Biotech startups located in GTB and Kansai area occupy 50% and 14.9%, respectively.**



## Realizing “World’s Most Advanced Bioeconomy” Society by 2030

### Expansion of market

Target: A total market size of \$840 billion in 2030 from current \$550 billion

### Formation of biocommunity

Building value chains in each market area by creating diverse and unique communities across Japan and by supporting their continued growth.

### Promotion of data linkage

Creating an environment that allows for broad and flexible collaboration, including in different fields.

# Japan's Leading Biocommunity

- Form an organic network with regional centers, with the international center at the core.
- Activate distinctive bio-industries throughout the country and promote the accumulation of excellent human resources and investment from Japan and abroad while also connecting with global clusters.



Tsuruoka Science Park, Keio Univ., Tsuruoka City, Spiber Inc. etc...

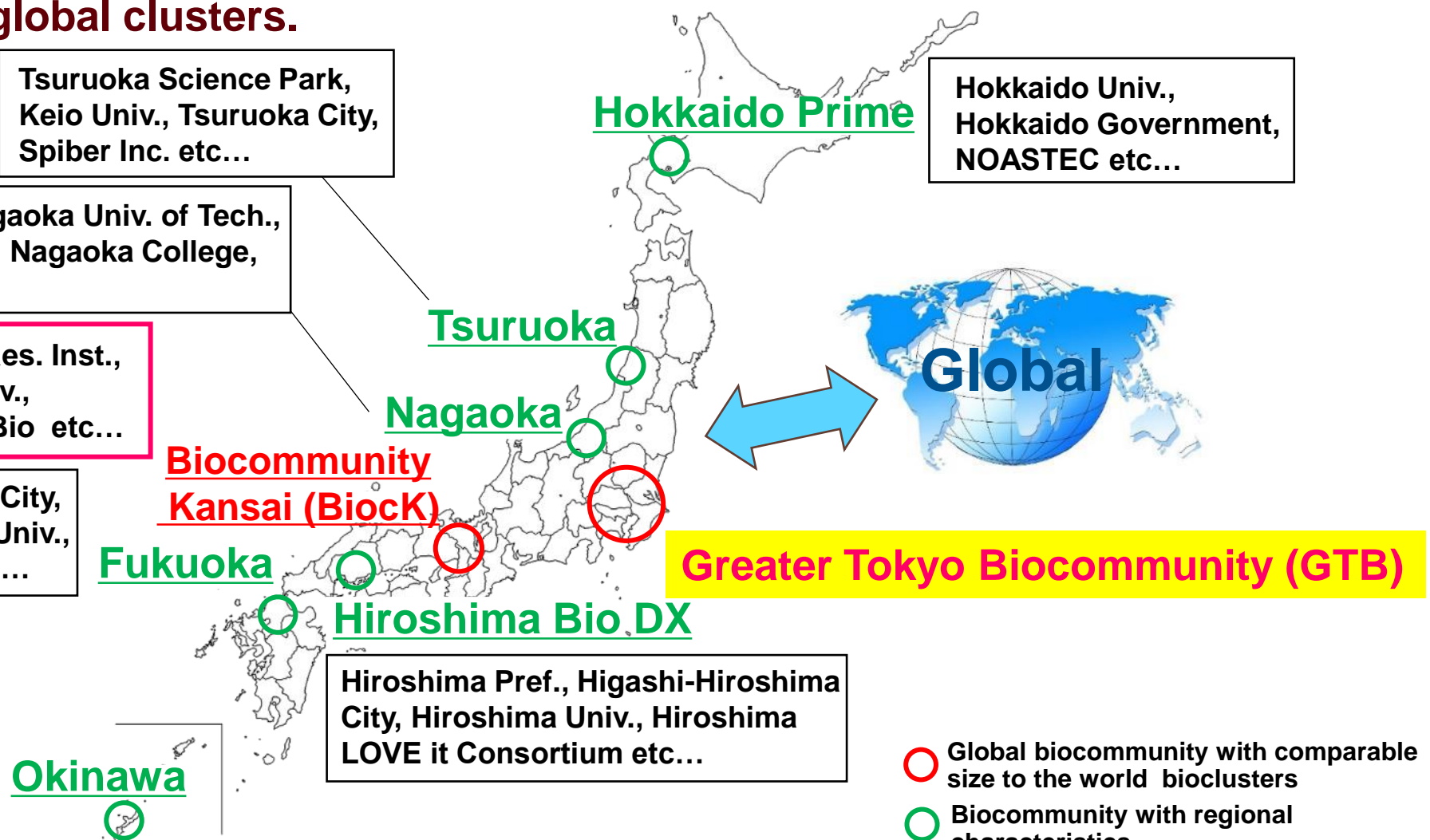
Hokkaido Univ., Hokkaido Government, NOASTEC etc...

Nagaoka City, Nagaoka Univ. of Tech., Natl. Inst. of Tech. Nagaoka College, JA etc...

Kyoto Univ., iPS Res. Inst., RIKEN, Osaka Univ., Kobe Univ., KinkiBio etc...

Fukuoka Pref., Kurume City, Kyushu Univ., Kurume Univ., BONAC corporation etc...

OIST, Meisho Univ., Ryukyu Univ., Natl. Inst. of Tech Okinawa College, Okinawa General Bureau etc...



- Global biocommunity with comparable size to the world bioclusters
- Biocommunity with regional characteristics

# GTB Bio-innovation Promotion Areas

## 5. Kawasaki Area

The Open Innovation City with Direct Access to Haneda Airport



## 3. HOTS HILL

(Hongo/Ochanomizu/Tokyo Station Area)  
The Largest Concentration of Academia in GTB



From Press Release

## 4. Nihonbashi Area

Global life science business hub in the heart of Tokyo



From LINK-J HP

## 1. Tsukuba Area

The Biggest Science City with Various Institutions

From brochure



## 6. Yokohama Area

Innovative City Focusing on Health and Medical Care



## 7. Shonan Area

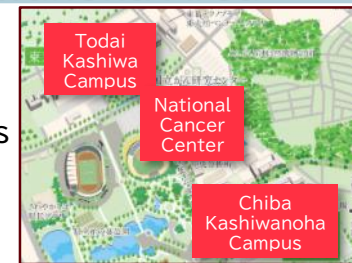
An Innovation Hub with the Largest Wet Lab, in Collaboration with Neighbouring Hospitals



Shonan Health Innovation Park

## 2. Kashiwanoha Area

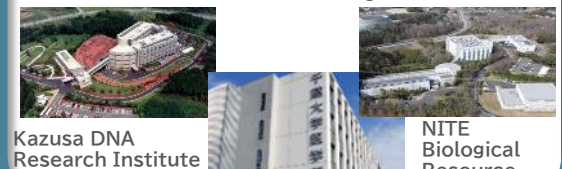
The Smart City with Top-Tier Universities and the National Cancer Center



From Kashiwanoha Smart CityHP

## 8. Chiba/Kazusa Area

The Research Base of Plant, Immunological Medicare and Biomanufacturing



Chiba University



Note 1) In addition to areas above, Shinjuku, Shinanomachi, Waseda, Tsukiji, Daiba, Tokorozawa, and Wako are emerging areas.  
Note 2) As new areas are developed, area definition maybe restructured.

# Structure of GTB Council

## GTB council

**Chair: Mr. Osamu Nagayama (President, JBA)**

**Vice-Chair:**

**Mr. Manabu Miyasaka (Vice-Governor of Tokyo Metropolitan Government)**

**Dr. Toshiya Watanabe (Vice-President, Univ. of Tokyo)**



Mr. Nagayama



Mr. Miyasaka



Dr. Watanabe

- Established in 2021
- Three chairs are from business, academia and government.

**Industries**

**Related organizations**

**GTB practical member meeting**

**Working group**

**Academia**

**Financial & investment institutions**

In operating the GTB Council, participants will be convened at the working level to discuss operational policies and specific initiatives in a practical manner.

Members were selected from the GTB Council organizations to discuss detailed agenda items in each area, including specific actions to be taken. Established as needed.

**Local governments**

**Advisor**

**Observer (Government)**

**GTB supporter**

**Miscellaneous**

Regional biocommunities, The Tokyo Consortium - Startup Ecosystem, COI-NEXT "Tsukuba Digital-Bio International Center" etc.

Collaborations



**GTB secretariat (Japan Bioindustry Association)**

**Secretary General: Mr. Yoshiaki Tsukamoto (Executive Director, JBA)**

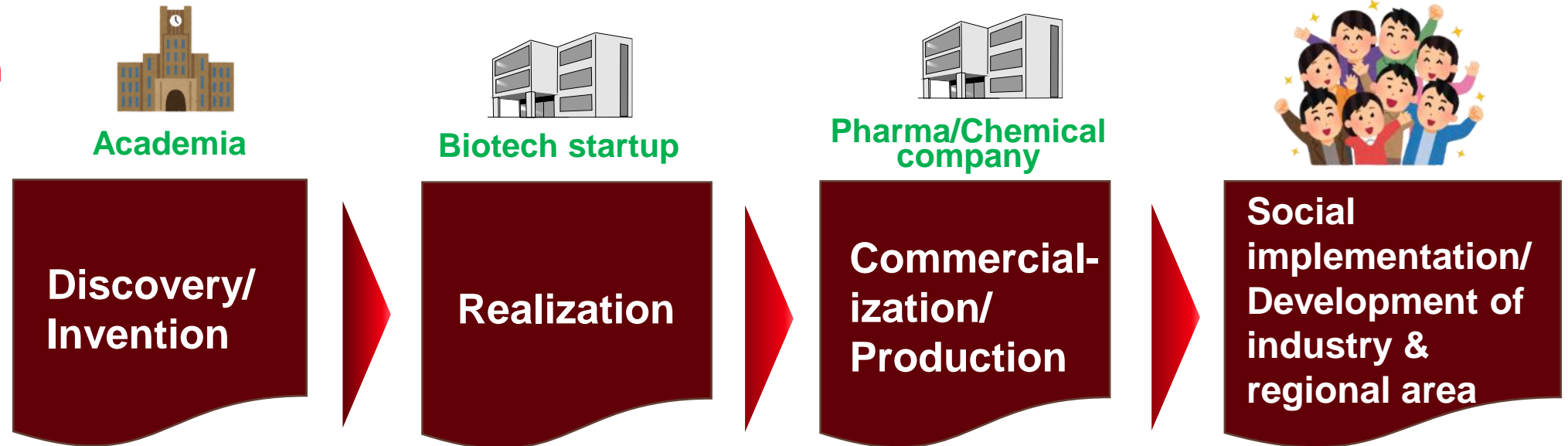




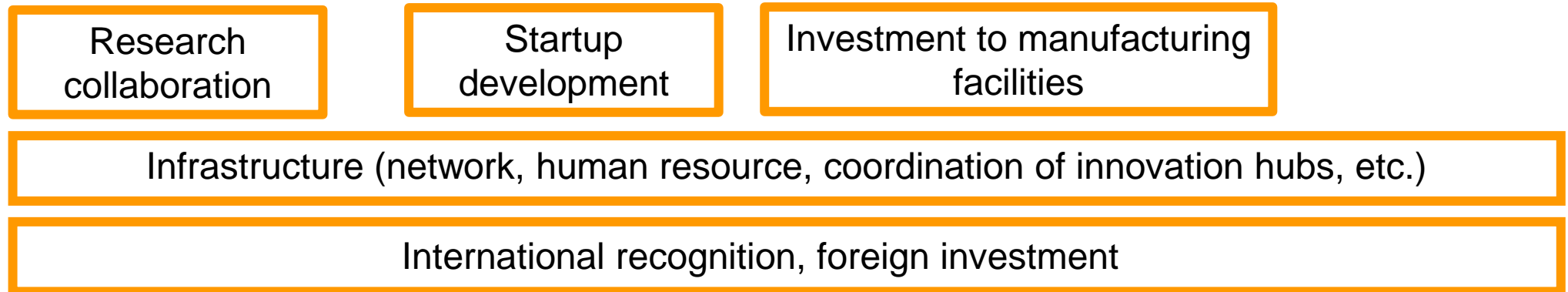
# GTB: Goal and Approaches

**Goal** Make the Tokyo Area one of world's premier innovation centers

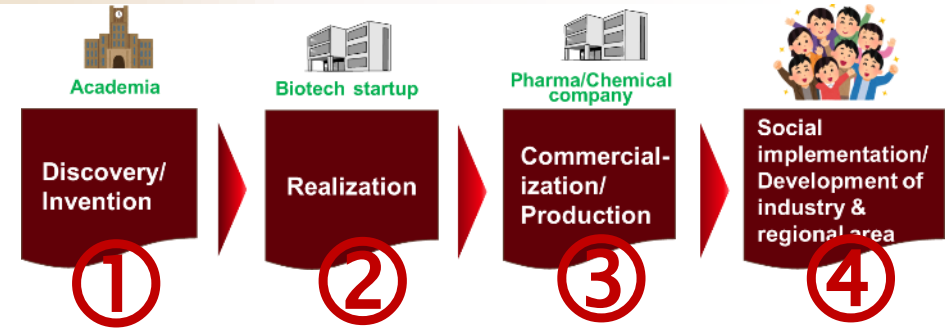
**Value chain**



**Approaches**



## Facts & Figures (As of August, 2023)



### ① R&D:

**21 Government funded projects**

Total max. **~1.5 Bil. USD** / 10 years (2021-2030)

### ② Incubation facilities: Startup Support:

Total floor area of **~555,000 m<sup>2</sup>**

**~1.4 Bil. USD** by Government (Estimated)

### ③ Bio manufacturing:

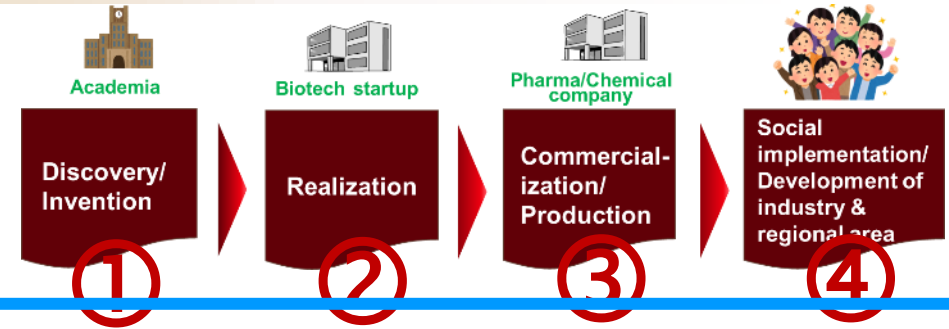
**12 Biologics manufacturing sites or headquarters**

Subsidies of **~1.6 Bil. USD**

### ④ Private investment:

Total **>3.4 Bil. USD** / ~2 years (2021-2023)

## Facts & Figures (As of August, 2023)



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## Tsukuba



Tsukuba Digital-Bio International Center (Univ. of Tsukuba)



Promotion of Innovation in Medical-engineering Collaboration (Tsukuba Global Innovation Promotion Agency)



Green Innovation (Sekisui Chemical)

1

## HOTS HILL



Co-JUNKAN Platform (Univ. of Tokyo)



Flagship area for Vaccine Development (Univ. of Tokyo)

2

## Kashiwanoha



Innovative Next Generation of Oligonucleotide Therapeutics (Tokyo Univ. of Sci.)



Implementation of regenerative, cell and gene therapies (J-TEC, Univ. of Tokyo, National Cancer Center)



Cooperation among regional core and distinctive research universities (Chiba Univ.)

## Kawasaki



Resilient Healthy Aging Society (iCONM)



Green Innovation (Chitose)



Support Org. for Vaccine Development (CIEA)



Implementation of regenerative, cell and gene therapies (Fujita Med. Univ., Keio Univ., CIEA, RINK)

3

4



Green Innovation (Sojitsul)



Wellbeing (Keio Univ.)



Recycling-oriented society (Tokyo Univ. of Agr. & Tech.)

8

## Chiba-Kazusa



Bio Foundry (GEI)



Synergy Org. for Vaccine Development (Chiba Univ.)



Green Innovation (NITE)

## Yokohama



Metacare City (Yokohama City Univ.)

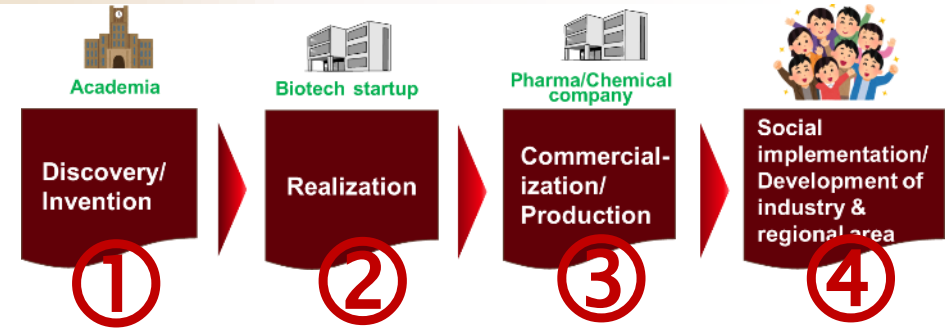
7



Green Innovation (Fuji Film)



## Facts & Figures (As of August, 2023)



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## 3. HOTS HILL

-  **Fast Track Initiative, Inc.**
-  **DCI Partners Co., Ltd.**
-  **UTokyo Innovation Platform Co., Ltd.**
-  **The University of Tokyo Edge Capital Partners Co., Ltd.**

## 4. Nihonbashi

-  **Remiges Ventures, Inc.**
-  **Newton Biocapital Partners**
-  **Mitsubishi UFJ Capital Co., Ltd.**

## Others

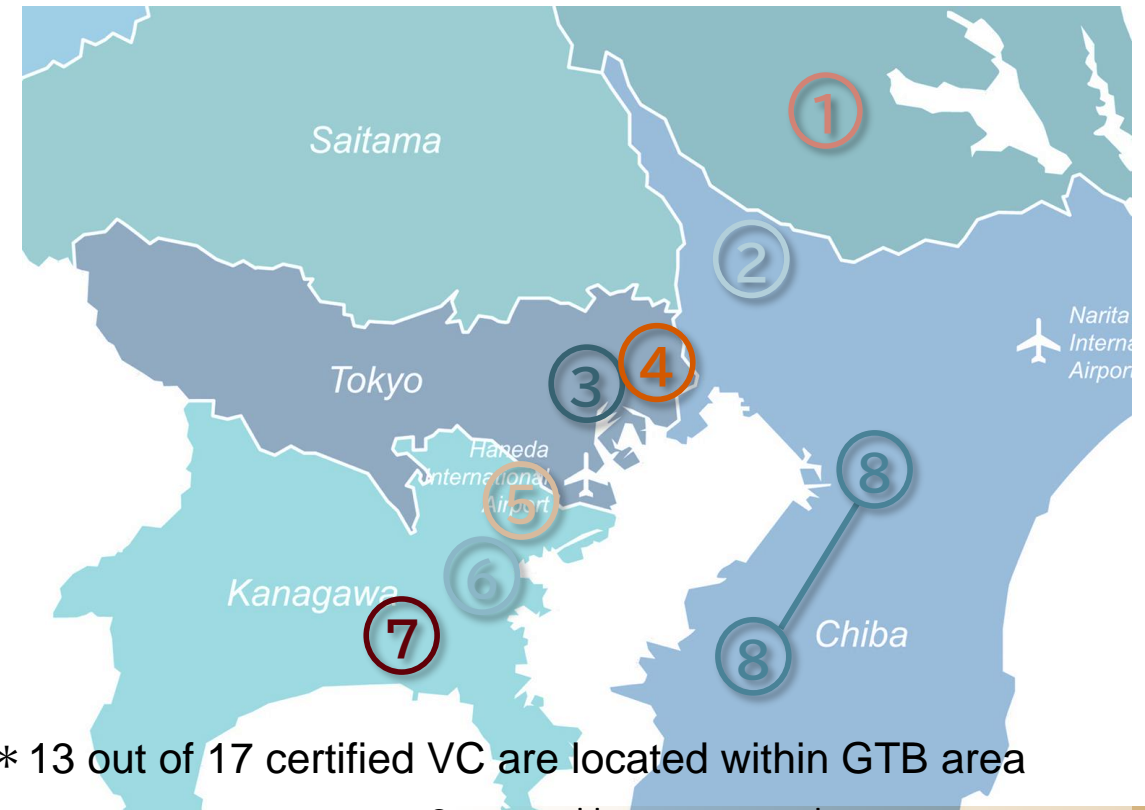
-  **Catalys Pacific, LLC (Minato-ku)**
-  **D3 LLC (Shibuya-ku)**
-  **Eight Roads Capital Advisors Hong Kong Limited (Minato-ku)**
-  **Saisei Ventures LLC (Shinagawa-ku)**
-  **JIC Venture Growth Investments (Minato-ku)**
-  **JAFCO Group Co., Ltd. (Minato-ku)**

Total support: **2.8 Bil. USD** (domestic)

50% of Startups are located within GTB area.



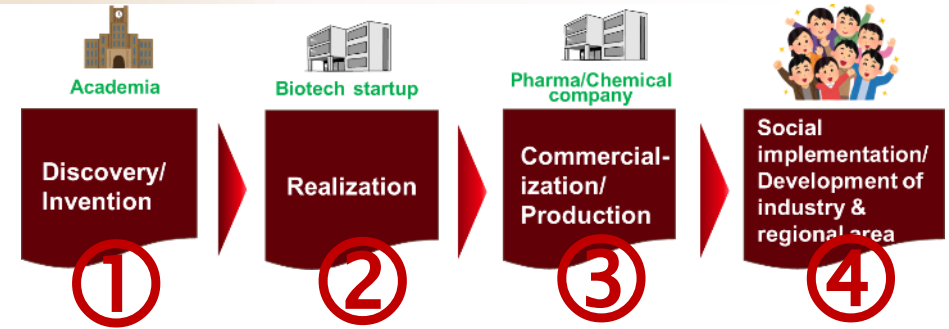
Total support for GTB area by government: **1.4 Bil. USD** (domestic, estimated by JBA)



\* 13 out of 17 certified VC are located within GTB area

Converted by average exchange rate through 2021-2023: \$1 =¥124

## Facts & Figures (As of August, 2023)



### ① R&D:

21 Government funded projects

Total max. **~1.5 Bil. USD** / 10 years (2021-2030)

### ② Incubation facilities: Startup Support:

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**~1.4 Bil. USD** by Government (Estimated)

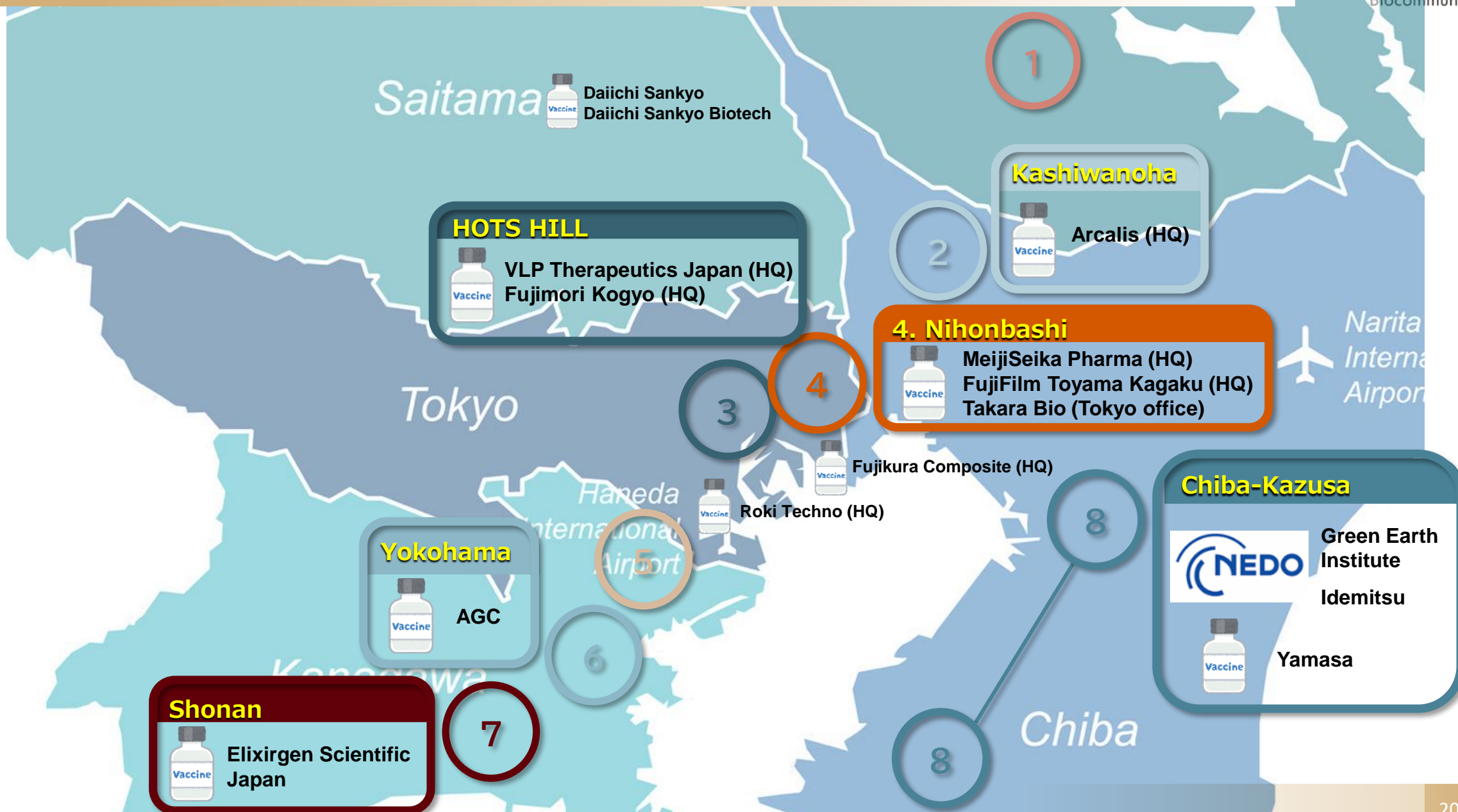
### ③ Bio manufacturing:

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Subsidies of **~1.6 Bil. USD**

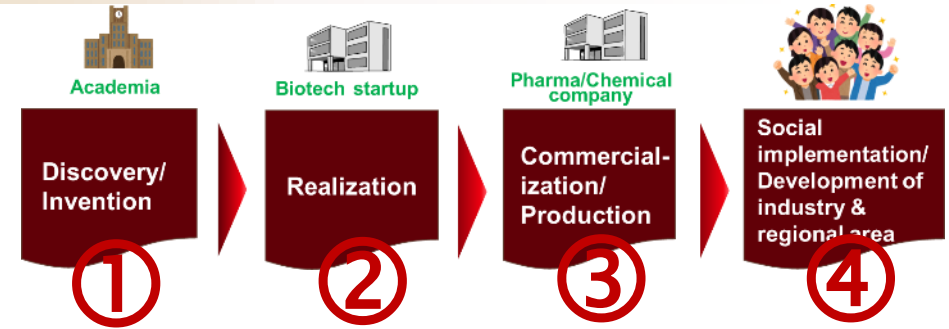
### ④ Private investment:

Total **>3.4 Bil. USD** / ~2 years (2021-2023)



\* 12 out of 17 companies with certified manufacturing sites are located within GTB area

## Facts & Figures (As of August, 2023)



### ① R&D:

**21 Government funded projects**

Total max. **~1.5 Bil. USD** / 10 years (2021-2030)

### ② Incubation facilities: Startup Support:

Total floor area of **~555,000 m<sup>2</sup>**

**~1.4 Bil. USD** by Government (Estimated)

### ③ Bio manufacturing:

**12 Biologics manufacturing sites or headquarters**

Subsidies of **~1.6 Bil. USD**

### ④ Private investment:

Total **>3.4 Bil. USD** / ~2 years (2021-2023)



# Private Investment (Apr., 2021 to Jul., 2023) Total 3.4 Bil. USD /~2 years

## 5. Kawasaki Area

Peptidream will construct laboratories (157.0M).  
Shimadzu opened "Shimadzu Tokyo Innovation Plaza" (16.1M).  
Fujita Medical Univ. will open "Innovative Medical Research Center" (-).

>173 Mil. USD

## 3. HOTS HILL

Univ. of Tokyo and Kubota agreed to collaboration (80.5M/10 yr.).  
Green Earth Institute was listed (93.4M).  
Cyfuse was listed (99M).  
Moderna acquired OriCiro Genomics (85M).

358 Mil. USD

## 4. Nihonbashi Area

Mitsui Fudosan opened Mitsui Link Lab Shin-Kiba 2 & 3 (-).  
Eurofin acquired Repertoire Genesis (-).  
Medikit acquired Bolt Medical (-).  
Perseus Proteomics was listed (81.3M).  
Renaissance was listed (81.3M).  
Susmed was listed (227.8M).  
CUORiPS was listed (79.7M).  
Others (205M)

>916 Mil. USD

## 1. Tsukuba Area

Eisai renovated Tsukuba Research Center (68.4M).  
Prologis constructed logistic center with incubation facility (-)  
Nisshin Foods acquired real estate for manufacturing facility (104.6M)

>173 Mil. USD

## 6. Yokohama Area

Hoop Partners opened rental lab. (12.1M incl. 1.8M of R&D related).  
AGC introduced biopharmaceutical manufacturing site (2~300M).  
Chigai Pharmaceutical opened research center (1368M).  
Univaleo opened research center (95.8M).  
Resonac opened research center (51.5M).

>1528 Mil. USD.

## 7. Shonan Area

Takaosago International acquired old Chugai's research center (-).  
Raised funds: Chordia (71M), PRISM (43.2M), Fimecs (26.1M), Reborna Biosciences (13.2M), Orizuru Therapeutics (10.3M), GexVal (9.9M), GenAhead Bio (1.2M), SEEDSUPPLY (1.4M)  
Noile-Immune Biotech was listed (177M).

>353 Mil. USD

## 2. Kashiwanoha Area

Teijin opened CDMO for regenerative medicine (-).  
Astellas opened open innovation site for cancer microenvironment (-).  
H.U. Group opened a research center (-).  
Mitsui Fudosan constructed rental labs/offices (-).  
Mitsui Fudosan constructed hotel cooperative for National Cancer Center East Hospital (-).

>120 Mil. USD

## 8. Chiba/Kazusa Area

Startup companies originated from Chiba Univ. raised funds (total of 24M).  
Green Earth Institute opened "Satellite Research Labs" and "Biofoundry Research Labs" (-).  
Idemitsu will construct SAF manufacturing site (367M).

>392 Mil. USD

## Others

Japan Lyophilization Laboratory will establish a manufacturing site for diagnostic medicines (-)  
Toso will construct a research facility (58M)

>58 Mil. USD.



Converted by average exchange rate through 2021-2023: \$1 =¥124

# Bioventure Database

Providing the information on Japanese domestic biotech startups and their business activities

## Seeds

Register



Biostartup



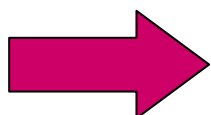
Presenting their proprietary seeds (technologies, products)

## Needs

Search



Large Co.



Searching for seeds satisfying their needs

**XYZ Co., Ltd.** [Field:Business] Pharmaceutical/Drug Discovery Drug discovery support/Contract service Chemical/Composed/Fiber last update : 2022/8/24

**Profile**

- Delegates :
- Incorporated :
- Paid in Capital : Million yen
- Employees : A
- Address : TOKYO
- TEL/FAX :
- URL :
- Attachment :
- Mission/Background : KNC Laboratories provides R&D and manufacturing services promptly and flexibly in any phase of your activity, from early research to commercial production. KNC Laboratories has been serving many industries including pharmaceutical, electronics chemical, agrochemical, energy, and environment. With expertise in organic chemistry and biochemistry, KNC Laboratories offers services such as GDS, R&D/manufacturing, PTE to meet customer's requirement in any phase of business.

**Technology & Business**

We hope that our clients take full advantage of our skills in chemistry accumulated in synthesizing more than 800 compounds a year, and also skills in pilot scale production and full scale production. We also have teams specializing in the areas of carbohydrates, steroid, nucleoside, peptide, oligonucleotide, microbial fermentation, extraction and purification, combinatorial chemistry/medicinal chemistry, and also process research & development chemistry. Especially in our microbial fermentation services, we offer client's target proteins, secondary metabolites, and bioconverted compounds in mg to kg order using our separation and purification technology. It is possible to scale up to 5,000 L under GMP regulations. Working area for genetic technology, from culture to removal of microorganism, is controlled under P1 level, as well as GMP.

Products & Service Name	Stage	Outline	Milestone
Microbial culture (GMP)	Service/Marketing	Cultivation services of various kinds of microorganisms including genetically modified strains are offered.	Our facility is equipped with 200 L and 500 L fermenter tanks controlled under GMP. We'll also offer a master cell bank service.
Middle molecule drugs (peptide, oligonucleotide)	Service/Marketing	For the production of large amount of oligo DNA, we developed a new liquid synthesis method with an original polymer support.	We'll start to supply 1 kg of product per 1 batch (GMP).
Bioconversion	Service/Marketing	We provide customers with costally active organic compounds by a bioconversion system with the chiral screening technology.	The synergy effect of our fundamental organic synthesis technology and biotechnology will be admitted to customer's requests.

**Highlights**

A developmental research not only based on commissioned business, but also bearing the cost in-house is conducted to construct a high profitable business by a joint application of patent, etc. We especially focus on the medium molecule drug business. In the mass production of oligonucleotide therapeutic, we developed a new liquid phase synthesis method using a batch type solid phase synthesizer with an original polymer support.

**Hot news**

In Dec. 2019, our head office and research facility were moved to Port Island in Kobe and expanded. Furthermore in May 2020, a new facility for purification of drug substances has been introduced at the Izumi plant.

**Alliance strategy**

Sales in pharmaceutical field account for a half of total revenue of KNC Laboratories. We provide R&D and manufacturing services promptly and flexibly in any phase of your activity, from early research to commercial production. We also offer pharmaceutical intermediates for low molecule drug, investigational new drugs, and drug substances under control of GMP. It is possible to produce medium molecule drugs (peptide, oligo nucleotide) and biopharmaceutical drug substances, too.



Biostartup

Large Co.

Deal done!



Currently, information on >150 startups is open to the public in English.

Link : [https://area34.smp.ne.jp/area/table/5697/FDN\\_H3/M?S=lbsfn2mbnak](https://area34.smp.ne.jp/area/table/5697/FDN_H3/M?S=lbsfn2mbnak)

Database is managed in collaboration with NPO Kinki Bio-Industry Organization.

Spare slides





# Incubation: Facilities (As of July, 2023)

Total floor area of ~555,000 m<sup>2</sup>

## 5. Kawasaki Area 73,403 m<sup>2</sup>

1. Life Innovation Center (LIC) 16,105
2. Life Science & Environment Research Center (LiSE) 2,000
3. iCONM in Collaboration with BioLabs 239.4
4. Research Gate Building III (RGBIII) 10,000
5. Kawasaki Business Incubation Center (KBIC) 36,959
6. Kanagawa Science Park (KSP) 7,535
7. Kawasaki-NEDO Innovation Center (K-NIC) 565

## 3. HOTS HILL 8,122 m<sup>2</sup>

1. TIP (TMDU Innovation Park) 664
2. The University of Tokyo Entrepreneur Lab 3,816
3. The University of Tokyo Entrepreneur Plaza 3,642

## 4. Nihonbashi Area 50,234 m<sup>2</sup>

1. Nihonbashi Life Science Buildings (15 facilities) 18,575
2. Mitsui Link Lab Shinkiba 1, 11,170
3. Mitsui Link Lab Shinkiba 2, 18,240
4. Mitsui Link Lab Kasai 2,249

## 1. Tsukuba Area 13,317 m<sup>2</sup>

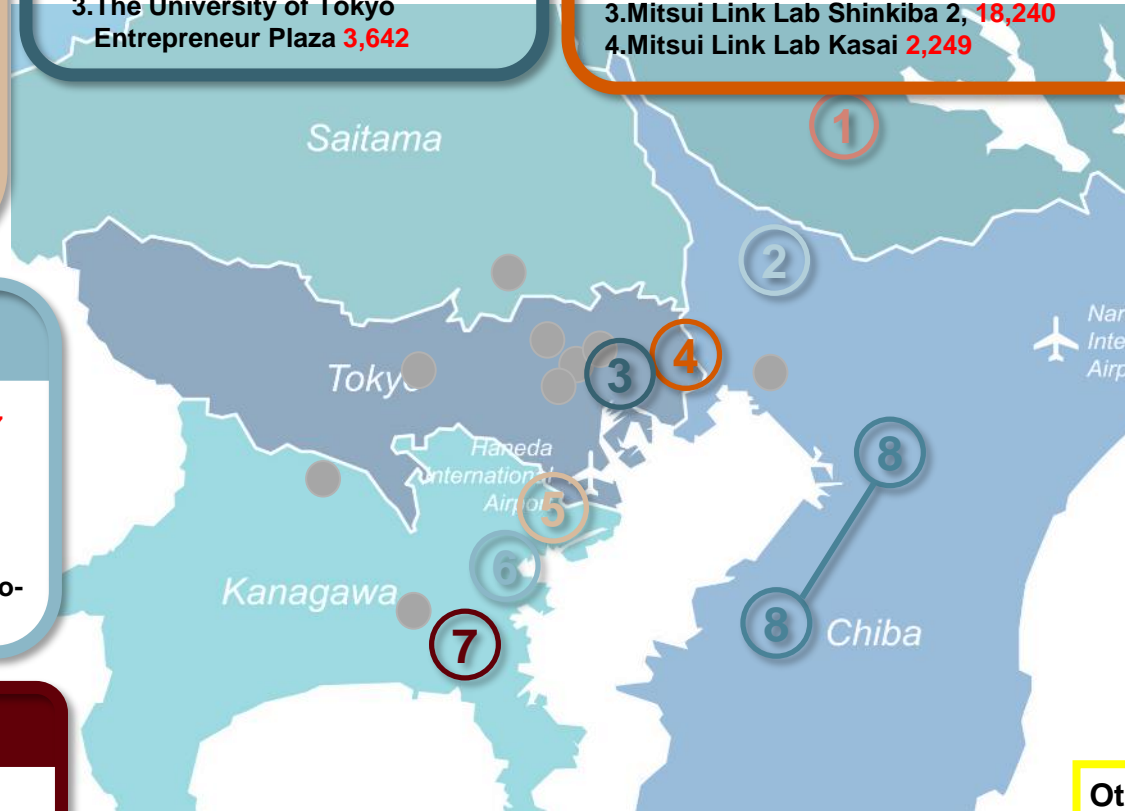
1. Tsukuba Center, Inc. (TCI) 11,200
2. Tsukuba Start Up Plaza - Start Up Office 265
3. Tsukuba Startup Park 1,852

## 6. Yokohama Area 39,128 m<sup>2</sup>

1. Tokyo Tech Industry-University Collaborative Research Building J3 Rental Laboratories 1,527
2. Tokodai Yokohama Venture Plaza 2,795
3. Yokohama Bio Industry Center 6,000
4. Yokohama Leading Venture Plaza 5,552
5. Yokohama Joint Research Center 8,363
6. Yokohama Kanazawa High-Tech Center Techno-Core 14,891

## 7. Shonan Area 300,000 m<sup>2</sup>

1. Shonan Health Innovation Park 300,000



## 2. Kashiwanoha Area 49,049 m<sup>2</sup>

1. Tokatsu Techno Plaza 11,881
2. Todai-Kashiwa Venture Plaza 2,856
3. The University of Tokyo Entrepreneur Hub (Kashiwa II Campus Industry-Academia-Government-Private Collaboration Building) 1,825
4. Mitsui Link-Lab Kashiwa-no-ha 1, 10,978
5. Kashiwa-no-ha Open Innovation Lab (KOIL) 9,794
6. KOIL TERRACE 11,715

## 8. Chiba/Kazusa Area 4,184 m<sup>2</sup>

1. Kazusa Incubation Center, Kazusa Akademia Park 1,449
2. Chibadai Inohara Innovation Plaza 2,735

Others within GTB area 18,076 m<sup>2</sup> in total

# Incubation: Acceleration activities (As of June, 2023)

## 5. Kawasaki Area

**K-NIC:** Consultation, business matching  
**iCOMN:** Collaboration with BioLabos  
**King Skyfront:** Tonomachi connect  
**RINK:** Tonomachi-based regenerative therapy network  
**KSP:** Support for entrepreneurship and growth

## 3. HOTS HILL

**TIP:** Innovation Idea Contest  
**Univ. of Tokyo:** FoundX  
**Univ. of Tokyo IPC:** 1stRound  
**Beyond Next Ventures:** BRAVE  
**PLUG and PLAY JAPAN:** Plug and Play Program

## 4. Nihonbashi Area

**INDEE Japan:** X-DOJO  
**Beyond Next Ventures:** BRAVE  
**DCI Partners:** Venture creation investment  
**National Cancer Center:** Accreditation system for certified ventures  
**LINK-J:** Out of Box Consultation

## 1. Tsukuba Area

**Univ. of Tsukuba:** Research Studio  
**TGI:** Support for medical device business  
**TLSK:** Pitch events, Young people's networking  
**Tsukuba City:** Startup ecosystem consortium  
**TCI:** Support for drug discovery and financing arrangements, innovation matching

## 6. Yokohama Area

**LIP Yokohama:** Support for overseas expansion and development of human resources  
**YOXO:** Startup support by Yokohama City  
**Tokyo Inst. of Tech.:** START (Support for startup ecosystem creation), entrepreneurship education organization  
**Tokyo Inst. of Tech./Beyond Next Ventures:** BRAVE

## 2. Kashiwanoha Area

**Asian entrepreneurship award (AEA)**  
**National Cancer Center/UTEC/Beyond Next Ventures:** NCC Incubation Program  
**Mitsui Fudosan/Kashiwa City:** KOIL startup Program  
**Kashiwa City/TX Entrepreneur Partners:** Startup Concierge Business

## 7. Shonan Area

**iPark:** SAMURAI (Consultation), Venture Mentoring Service, Incubation Program

## 8. Chiba/Kazusa Area

**Chiba Pref.:** Acceleration program of innovative venture enterprise growth, Chiba entrepreneur support business  
**Chiba Univ.:** JETRO's desk for industry-academy collaboration  
**NITE:** DBRP, Consultation for Cartagene Law

