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Something that has been on my mind as I’ve worked on this issue of The ACCJ Journal is travel. There are several reasons: friends, incentives, and restrictions. One of the things about being a writer and an editor is that you are constantly consuming information, either for research or fact checking. Sometimes you come to know more about a topic than you really want, at least from a stress-management point of view.

One reason travel has been top of mind for me is that I have friends who are itching to go somewhere—preferably abroad—and are frustrated that they can’t. Of course they understand the risk and know they must stay in Tokyo, but for globetrotters such as them that isn’t easy, and they tell me about it often.

GET SET, READY, GO!

Another reason is the Japanese government’s ill-fated Go To Travel campaign, which covers up to half the cost of transportation, hotels, restaurants, attractions, and shopping to encourage domestic travel and boost the economy.

At the start of this issue’s production cycle, I was planning to write about it. But now the nation’s largest city is excluded, and the government is considering an expansion of the restrictions. If a traveler has already booked a package to an area that is then added to the exclusion list, they will have to cover all the costs themselves. It’s a puzzling move given that it became clear the initiative was headed for trouble before it launched. The logical thing to do would have been to postpone it. Instead, it went forward anyway.

INSECURE LIVING

But perhaps the biggest reason I’ve been thinking about travel is the Japanese government’s stance towards permanent residents—especially those trying to come home. This one has especially been on my mind not only because I researched and wrote a feature about it (page 36) but because it hits at the heart of my own insecurities living in Japan.

I’ve called Japan home since 1997 and have been a permanent resident since 2008. I own land, built a house, and am 12 years into a 35-year mortgage. I own a small company, raised two children who are Japanese citizens, and, like any Japanese person, pay taxes to support the society. But if I had gone on a trip before April 3, when the borders were closed, I could have been stranded abroad. And if an emergency were to require me to leave Japan now, even for a day, I might not be able to come back. That’s frightening.

What’s even more frightening for me is the thought of what I would do. Unlike many expats, I don’t have a home in the United States. I’m completely based in Japan, so I would not be able to go to my residence Stateside and wait it out. Fortunately, I don’t need to travel, and I’m safe and sound at my home in the mountains of Kanagawa. But the situation has really made me think about the future.

Fortunately, as you’ll see in my story and have surely heard on the news, the government is starting to somewhat loosen the restrictions. But it’s still not easy for someone to come back, and the impact on business, education, families, and more is real and troubling. It all gives me pause as I look ahead and imagine what could happen in the future as someone living essentially as a guest in another country—even if my status has long been labeled permanent.
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Trade Stakes Beyond Tariffs

In discussions about trade agreements, the focus has traditionally been on tariffs—import duties and other restrictions placed by one country on the imported goods of another. This duty-based idea of trade has prevailed since the days when imports and exports of fleece, tea, and spices dominated the market.

But today almost every aspect of trade involves some sort of digital technology, so the stakes are much higher than simply agreeing on a tariff.

Here’s why: trade agreements reflect the technological era in which they are created.

AGREEMENTS PAST
In the pre-industrial era, the goods themselves were the focus. It was a comparatively simple model in which the goal of negotiations was to ensure that the crown or government received a duty for allowing the goods to be sold in their jurisdiction.

During the Industrial Revolution (1760–1840), the mass production era of the early 20th century, and even into the age of production automation, protecting domestic industries from global competition became the driving force behind negotiating trade deals.

In these later periods, trade agreements have been used to manage, control, and support the physical means of production, the goods themselves, and all the employment and economic benefits associated with having strong domestic industries.

We’re now in the midst of the Fourth Industrial Revolution, which is driving an exponential rate of change. Success now depends on mastering artificial intelligence (AI) and Big Data—and that changes everything.

BREAKING CONFINES
In the past, the plant and workers that produced a country’s economic advantage were physical, making import and export definitions fairly easy to assign to products. Economic fortune rose and fell depending on the ability to nurture and sustain domestic industries with export capacity.

But in an increasingly digital economy, the engine of economic advantage is distributed around the world. When we build cars in Tennessee and export them, for example, the industrial capability to produce those cars doesn’t ship—only the finished vehicle does. If various jurisdictions have different regulations regarding licensing, emissions testing, or safety features, the competitive impact on the plant back in Tennessee is limited.

Now substitute that auto plant for just about any large international business seeking to create economic advantage through digital technologies (and that covers pretty much all industries at this point). The algorithms and Big Data repositories they’re relying on to drive growth aren’t confined to the four walls of a plant. These things are at the core of their operations in every country in which they do business—often whether the company has an office there or not.

Who controls these new digital engines—and how they’re governed, taxed, and regulated—has a very direct impact on the competitiveness of a business.

Governments have become keenly aware of this and are reacting in different ways. Some are continuing on a globalist path. Others are taking a techno-nationalist route. In the European Union, the focus has been on protecting consumer privacy. The United States–Mexico–Canada Agreement has focused more on the free flow of data. Elsewhere, significant challenges exist for international businesses as countries such as China seek to collect and manage data centrally under the government’s leadership.

Rules that are fragmented across national borders, or that potentially expose the algorithms, AI, and Big Data that companies rely on for competitive advantage, are detrimental to international trade and national security.

TALKS CONTINUE
Within the next few months, the United States and Japan are set to begin Phase 2 of negotiations on the US–Japan Trade Agreement and its digital provisions. The opportunity for both sides is to set a regional and global example of how countries can cooperate to protect the interests of consumers, businesses, and governments.

Key to this negotiation will be agreement on data governance, cybersecurity, and cross-border data flows. Setting a new best standard could lead to greater harmonization in other trade agreements to allow all industries to compete globally on a level playing field. Effective enforcement mechanisms will also be needed to give the agreement teeth.

What’s at stake isn’t just market access or harmony in regulations. This time, it’s about preserving and protecting the fundamental competitive advantages of business.
When the coronavirus began to disrupt business in February, the American Chamber of Commerce in Japan (ACCJ) moved quickly to keep members connected and ideas flowing. The launch of the Business Continuity Network (accj.or.jp/bcn) was one such step, and it brought together a range of tools and sparks for discussion to help everyone move forward along the bumpy road ahead.

Perhaps the most visible aspect was the shift to virtual events. Greater integration of digital was already underway at the chamber before Covid-19, but a silver lining of the crisis is that those efforts have been accelerated. The ACCJ is fortunate to have the developers of two leading online collaboration platforms—Webex and Google Meet—as President’s Circle member companies. With the help of Cisco Systems G.K. and Google G.K., the chamber has transitioned to a virtual space where more members than ever are gathering to exchange ideas, solve problems, and nurture connections.

**VITAL LINKS**
The ACCJ hosts more than 500 events and meetings each year, but had to pause in-person meetings on February 27. Covid-19 posed a serious threat to this vital benefit of chamber membership, but it also allowed the ACCJ to add flexibility and convenience, enabling members to more easily attend sessions that might otherwise not fit into their busy schedules—regardless of travel concerns.

The calendar has been packed—55 events and meetings were held in June and 50 in July, with more than 3,000 registrations, making for an active summer. Attendance has held steady compared with in-person events for the same period last year. In many cases it has even increased.

The ACCJ Chubu chapter stepped up to a huge challenge and found a way to hold the annual Walkathon, a key fundraiser organized with Nagoya International School, virtually on May 24. This success is helping other members consider how to approach upcoming special events, such as the Women in Business Summit and the ACCJ Charity Ball.

Barbara Hancock, co-chair of the Charity Ball Committee, said that the virtual format has “opened up more possibilities for the chamber, and, as companies transition to new ways of working, it’s great that the chamber has jumped into the virtual world—I see more of this happening in the future.”

Although members miss in-person gatherings, they have embraced virtual events overall.

“These events have kept the community connected in a time of stress, providing useful information and offering a wider variety of speakers and formats that may have not been possible...”
in the past,” said Deborah Hayden, vice-chair of the Alternative Investment (AIC) and Women in Business Committees.

A common wish expressed to The ACCJ Journal is that, beyond the pandemic, a mix of in-person and virtual events will be offered. Given the benefits of the online format and the likelihood of prolonged concerns about travel, a hybrid approach can bring the best of both worlds and support the Digital Chamber initiative as well as the goal of bringing the Chubu, Kansai, and Tokyo chapters closer together as One ACCJ.

LOGISTICS

Staging any event requires many steps and presents challenges, whether it takes place at a physical location or online. The ACCJ Journal asked organizers about their experiences.

“Arranging a virtual event or meeting has unique challenges, as this is all new to pretty much everyone. First, you have multiple technologies with varying degrees of usage experience and bandwidth. Second, the management and flow of the event—with all speakers distributed—are quite different than physical events. This means that a rehearsal is essential to mitigate tech apprehensions and focus on the topic, which adds preparation time for all,” explained Timothy Connor, co-chair of the Special Events Committee and Communications Advisory Council. “That said, these events are a great chance to have speakers who are not physically nearby, or even in the same time zone, participate as well. I am looking at these events as a tremendous opportunity for the chamber to attract more members and increase our global visibility.”

Scott Warren, co-chair of the Legal Services and IP Committee, said that it has been easier to organize and hold events in general. “The fact that anyone in the chamber can attend virtually, not having to worry about the logistics of travel and cost, has been great. However, there is some lost interaction between panel

DIGITAL CHAMBER

In addition to virtual events, the ACCJ is going digital in other ways. The Digital Chamber project is designed to leverage technologies to enhance the member experience.

Broadly speaking, the project is focused on giving you improved access to and control over:

- Your relationship with the ACCJ, including communications, access to events, committee membership, and membership administration
- Your relationships with other members, including member-to-member communications and information sharing

First steps include the recent relaunch of the ACCJ website (accj.or.jp) to offer improved functionality and a proper events calendar. Simplified event registration and better control over your membership profile are in the works and, once in-person events can resume, we will be offering remote access to all events so that the wealth of expertise from members and guest experts will be more available than ever.

Where we go next is up to you. The Digital Chamber project is directed by member input and interest, so we welcome your ideas.

Some proposed changes include:

**Digital Invoices and Online Payment**

This feature would give members the option to receive digital invoices for annual dues and monthly charges. Invoices could be paid using traditional methods or online. The information and details contained in the invoices would be the same as the versions that are printed and mailed.

**Event Reminders**

Sometimes you see a notice for an interesting ACCJ event, but you’re not sure if you will be able to participate. This feature would add an option to the Events Calendar that allows you to set a reminder. Simply provide an email address and a date, and we’ll send you a note on the day you specify so that you can register for the event if it fits your schedule.

We’re always looking for more ways to make the ACCJ work for you. If you would like to share your ideas, please visit: accj.or.jp/the-digital-chamber
The ACCJ Is Working for You

During these challenging times, it’s more important than ever to make sure you and your employees stay connected, informed, and engaged, especially when other professional development activities are less accessible.

ACCJ members benefit from a virtual ecosystem that helps member companies stay informed and connected, at a fraction of the cost of travel and conference fees. This invaluable resource includes the following benefits:

- **Connect** with more than 70 special interest committees
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- **Influence** advocacy efforts that reach regulators and lawmakers with the voices of more than 3,000 members

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members and the speaker, and it has been more difficult to read the audience, due to not being together in person.”

Given his experience as an attendee and speaker during this crisis, Warren thinks that hybrid events, where some members attend in person while others join online, may be a good approach for the near term, once conditions improve enough for physical events to resume, with adequate precautions, of course.

**BENEFITS**

AIC Chair Frank Packard said that virtual events have allowed the AIC to feature speakers from around Asia and Europe, as well as to broadcast the events to a global audience. “The logistics of working with overseas people is much easier. We can use time more efficiently with no need for travel to and from the venue, it’s less expensive to host the event, and we are able to gain access to first-class speakers from around the world since they do not have to come to Japan.”

Scalability is another plus. Legal Services and IP Committee Co-Chair Catherine O’Connell said: “The sheer ability to connect to a much wider audience is powerful, and is something that in-person events cannot do. Online events such as the Chubu Walkathon got more attendees than past in-person Walkathons, and that is simply amazing in itself as a statistic.”

She also mentioned accessibility to discussion after the fact and a clearer picture of engagement. “We can revisit the website portal with the same member login details and rewatch some of the sessions later on. It gives a chance for members to catch other interesting sessions which they might have initially missed. And virtual events help the ACCJ acquire real, insightful data from attendees instantly. This data can help the chamber fine tune the content and format of future events.”

**CHALLENGES**

Of course there are obstacles to overcome when hosting virtual events—not only the obvious technical aspects of internet connections, data speed, and software, but also corporate security policies which, especially at larger companies, may create complexity for those wishing to join or restrict the platforms.
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that can be used. These are all things that must be worked through to create an environment that is most useful for members and can accommodate specific needs.

While virtual events do allow more people to come together more easily, there are some things that cannot be done through a screen.

“Networking is a key aspect of events and benefit of chamber membership, but virtual meetings pose a huge limitation since attendees don't really get an opportunity to have one-on-one discussions, unless it is in breakout rooms, which can be tricky depending on the platforms used,” said O’Connell.

She also mentioned that there is a big opportunity waiting for a virtual business card app that can allow members to exchange cards at online gatherings.

**ONE ACCJ**

Virtual events have also allowed the chamber to pursue One ACCJ, which brings together the three chapters—Chubu, Kansai, and Tokyo—into a more cohesive family. The goal is to allow equal access to all events for all members while retaining the autonomy and regional focus of each chapter.

“The One ACCJ concept has been around for a while, but I don’t think it really resonated before Covid-19,” explained ACCJ-Chubu Vice President Ray Proper. “The increase in remote events has opened more and broader opportunities for information and networking, and has helped push this concept away from an aspiration towards a reality.

“Whether an attendee is from Chubu, Tokyo, or Kansai, the current environment offers more members the chance to consume information and make connections that might not have been previously available without a ticket. It allows us to present to a broader audience, even if it does come at the cost of other opportunities, such as in-person networking.” He noted that the labels Chubu Event, Kansai Event, and Tokyo Event have functionally lost all meaning, as anyone can attend or present to everyone in the chamber in a way that wasn’t possible before.

Mark Hosang, co-chair of the ACCJ-Chubu Programs Committee, also likes the potential of One ACCJ. “With online being an option, Chubu members who weren’t able to travel to Tokyo can now participate in more events there, which has brought greater value to members in the Chubu area, where we don’t put on as many events as Tokyo,” he said. “It also allows members who speak at events hosted by the Chubu chapter to get more exposure with people in Tokyo.”

He noted that while an online participation option was introduced last year, it was not cost-effective for all members and was not available for all events. “With Covid-19 and the push to move everyone online, the adoption of virtual participation has been accelerated. And with many members having been hit particularly hard by the coronavirus, on a business and personal level, the weekly updates delivered through town halls and special sessions have proved vital and cemented the value that the ACCJ brings to our members.”

**BRING IT ALL TOGETHER**

There’s no doubt that the future is digital, and that virtual connections will be a part of business as we move beyond Covid-19. The pandemic has been the trigger many organizations needed to push forward initiatives already in place, and certainly the ACCJ feels that it has been an opportunity to shape a stronger chamber for the global business community in Japan—and beyond.

Hayden summed up the core benefit not only of virtual events but also One ACCJ: “It will offer a wider opportunity. We can call on interesting speakers from around the world who we may not normally have the chance to hear, as they may not be able to travel to Japan regardless of coronavirus restrictions.”
The American Chamber of Commerce in Japan (ACCJ) New Digital Agenda (NDA) White Paper Task Force convened a special webinar on July 1 that brought it together with representatives from the Ministry of Internal Affairs and Communications (MIC), the Economic and Science Affairs section at the Embassy of the United States, Tokyo, and Keidanren (the Japanese Business Federation).

The purpose was to discuss new initiatives to enhance cooperation between the US and Japanese governments, as well as the respective private sectors, on commercial opportunities and shared policy issues in the rapidly growing bilateral and global digital economy.

Joining from the Japanese government side was MIC Deputy Director General for International Economic Affairs Mitsuhiro Hishida. Keidanren was represented by Toshinori Kajiura, acting chair for the Subcommittee on the Digital Economy, and Makoto Yokozawa, chair of the subcommittee’s Global Strategy Working Group. Timothy Cipullo from the US Embassy’s Economic and Science Affairs section also joined, as did ACCJ members Yoshitaka Sugihara, chair of the Digital Economy Committee, and James Miller, chair of the NDA Task Force. As the senior advisor to the task force, I moderated the discussion.

MARKING A MILESTONE

The webinar was organized to mark the 10th anniversary of the ACCJ white paper Achieving the Full Potential of the Internet Economy in Japan, published in November 2009, and to bring attention to the recent launch of the NDA Task Force, which has been tasked by the ACCJ Board of Governors to research and draft a successor to the 2009 paper.

The new document will make recommendations for accelerating the deployment and utilization of new digital technologies in key sectors of Japan’s economy, enhanced cooperation between the United States and Japan in third-country markets, and how international institutions can help develop the global digital economy.

The webinar covered a wide range of topics reflecting the diversity of issues in the digital economic space. Yet, what was most striking during the 90-minute session was the convergence in the positions taken on these issues by Japan and the United States, based on a set of shared values and interests that have been forged and tested over the past decade.

This was neither accidental nor inevitable. It is the result of a relationship carefully nurtured through the most significant of the 70-plus recommendations included in the 2009 white paper.

CREATING DIALOGUE

The annual US–Japan Policy Cooperation Dialogue on the Internet Economy, the creation of which was recommended in the 2009 white paper, brings together representatives of the two governments with leaders from the ACCJ and Keidanren to discuss bilateral and global developments in the digital economy. The habits of cooperation developed through these exchanges and joint actions, over the course of a decade of meetings held...
alternately in Tokyo and Washington, DC, have forged a firm basis for expanding cooperation between the two countries—something that was reflected in the webinar discussion. Following are highlights of the views shared by the panel.

MITSUHIRO HISHIDA (MIC)
The deputy director general for international economic affairs kicked off the session by voicing the Japanese government’s appreciation for the ACCJ’s suggestion of a dialogue to create a framework for the two governments and business communities to exchange views and take joint actions on common concerns in the digital policy space. He noted that, today, the dialogue is organized around three pillars:

- Bilateral cooperation
- Coordination of positions in global bodies
- Third-country coordination, especially in Asia

The dialogue has been expanded and deepened most recently with the launch of the Working Group on the Japan–US Strategic Digital Economy Partnership (JUSDEP), the first meeting of which was held on March 1, 2019. Hishida noted that the group had met three times over the past year (the second meeting was on April 23 and the third on October 10–11) and is focusing on how to respond to China’s Belt and Road Initiative, as well as engaging in the promotion of smart-city technologies and working on the challenges of deploying 5G.

Hishida noted that the statement on innovation and digitalization released at the G20 Summit held in Osaka on June 28–29, 2019, highlighted how the United States and Japan approach rulemaking for the digital economy compared with the European Union (EU) approach. Whereas Europe is focused on regulation, Japan and the United States support market-driven solutions.

Looking ahead to the next meeting of the Internet Economy Dialogue, Hishida said his list of topics for discussion includes:

- Support for current efforts to deploy 5G technologies
- Consideration of the parameters for the Beyond 5G strategy
- Lessons learned in areas such as telemedicine and work from home
- Continuing promotion of the free flow of data in various forums
- Working together to help third countries with cybersecurity

TOSHINORI KAJIURA (KEIDANREN)
The acting chair of Keidanren’s Subcommittee on the Digital Economy began by commenting that, over the past decade, Japan and the United States have been working on issues related to cross-border data flow—including in discussions associated

LOOKING BACK . . . AND AHEAD
Tom Whitson, who was ACCJ president in 2009 and 2010, forwarded the following message to set the tone for the discussion:

I was the ACCJ’s Lehman Shock president in 2009, when the original internet economy white paper was released. Publication took place at a time of wrenching economic change and reflected a new, cooperative ACCJ relationship with the Japanese government and businesses.

I am very proud of this paper, which has had a unique and unforeseen life expectancy. Many of its 70 or so recommendations are now commonplace in Japanese education and society, and the US–Japan Policy Cooperation Dialogue on the Internet Economy—which we called for in the white paper—continues to keep the two governments on the same page in setting practical policies.

Today, we are undergoing equally wrenching economic, societal, and governmental change. Transformative technologies will affect US–Japan bilateral relations in deep and, perhaps, unforeseen ways. It will challenge our business, educational, government, and regulatory partners to further develop ways to move forward together. The ACCJ’s New Digital Agenda White Paper is a timely initiative to refresh the chamber’s thinking in this critical area of business and the bilateral US–Japan relationship.
with the negotiation of the proposed Trans-Pacific Partnership (TPP) Agreement. He noted that, if countries are to realize the full benefits of the digital revolution, there must be international consensus on how to manage data. This would include:

- Guarantees of access to data across borders
- Integration of data formats and data ID
- Development of compelling business models
- Adequate guarantees of cybersecurity and privacy

He suggested that these data-access issues should continue to be at the center of the Japan–US digital agenda over the coming decade.

Kajiura said that another key set of issues for that decade would probably revolve around cybersecurity, since this threat will become ever more serious with the deployment of 5G and new Internet of Things (IoT) applications. The coronavirus pandemic, he pointed out, has raised the profile of this issue due to increased reliance on telework and telemedicine.

Asked whether the current bilateral dialogue might be expanded to include the EU, Kajiura said that the dialogue should continue to be between Japan and the United States, since the approach to problems taken by the two countries is similar. The European perspectives on issues related to artificial intelligence (AI) and the definition of privacy are very different, and that makes identifying practical areas for cooperation difficult. However, there may be specific issues (e.g., cases of data utilization) where a trilateral format could produce tangible results.

TIM CIPULLO
(EMBASSY OF THE UNITED STATES, TOKYO)

The embassy’s acting director for economic and science affairs noted that the habits of cooperation developed over the past decade between the United States and Japan are embodied in the US–Japan Digital Trade Agreement concluded on January 1. He added that current priorities in the ongoing digital dialogue include:

- 5G deployment
- Securing national networks
- Expanding cross-border privacy rules
- Working together on global digital standards
- Pushing back against data localization in third-country markets

Noting Japan had recently signed on to the Prague Proposals, agreed at the Prague 5G Security Conference, held on May 1–2, 2019, in the Czech Republic capital, Cipullo stressed that Japan and the United States share a commitment to maintaining a free and open internet, and to using digital technologies in ways consistent with democratic values.

He noted that the issues involved here are not narrowly technical, but include fundamental civil liberties concerns. Japan’s cooperation with the United States in responding to the Covid-19 threat has also demonstrated the strength of the bilateral partnership, with the two countries sharing large health data sets and using AI to accelerate research for a vaccine and other therapies.
JAMES MILLER (ACCJ NDA TASK FORCE)
The decision by the ACCJ leadership to launch the NDA Task Force—and commitment to releasing a new white paper—was explained by the group’s chair, James Miller, who said that the white paper will outline areas for US–Japan cooperation on the digital economy over the next decade and stressed that the goal is not to be overly prescriptive.

Instead, the Task Force hopes to develop a framework and mechanisms that can enhance cooperation between the two countries and business communities on shared objectives in the digital space. He added that a portion of the white paper will profile the activities of US companies that are making important contributions to Japanese society and areas of the economy such as healthcare, e-commerce, financial services, transportation, and education.

MAKOTO YOKOZAWA (KEIDANREN)
The chair of Keidanren’s Global Strategy Working Group, who was one of the organizers for the 2019 B20 Tokyo Summit, said that the Society 5.0 concept discussed at this forum was a joint initiative between the Japanese government and private sector, designed to serve as a platform and roadmap for progress on digital issues. The coronavirus, however, has upended things and we will probably never get back to the old “normal.” So, we need to start thinking now about what the next stage will look like.

In this regard, this year’s B20 meeting, which is scheduled to be hosted by Saudi Arabia on October 26–27, will be an important moment for Japanese and US leadership to address issues associated with the new normal in areas ranging from the office to the classroom.

The coronavirus has vastly accelerated the pace and need for digitalization in the economy and society, and we must get ahead of these trends or risk creating a new digital divide between those who can work at home and those who have lost their employment.

YOSHITAKA SUGIHARA (ACCJ DIGITAL ECONOMY COMMITTEE)
One of the key leaders in drafting the 2009 white paper, and in proposing the Policy Cooperation Dialogue on the Internet Economy, Sugihara described the range of US–Japan cooperation on digital policy issues as unprecedented.

A DECADE OF US–JAPAN POLICY COOPERATION ON THE INTERNET ECONOMY

Dialogue One
November 2010 (Tokyo)
Key Issues: Utilization of cloud technologies in education and health; better security for commercial networks; preservation of internet openness

Dialogue Two
June 2011 (Washington, DC)
Key Issues: ICT role in disaster response; protection of critical infrastructure; joint research on future technologies; working with multi-stakeholder partners in international institutions

Dialogue Three
March 2012 (Tokyo)
Key Issues: Stronger cooperation on global data privacy concerns; creation of a bilateral cloud computing working group; enhanced measures to respond to cyber incidents

Dialogue Four
October 2012 (Washington, DC)
Key Issues: Collaboration on interoperability and data portability in the cloud; sharing best practices on e-government and open data; steps to strengthen consumer data protection

Dialogue Five
March 2014 (Tokyo)
Key Issues: Addressing growing cross-border cybersecurity issues; supporting APEC Cross-Border Privacy Rules; promoting industry-led standards development for cloud computing

Dialogue Six
September 2014 (Washington, DC)
Key Issues: Support for the transition of the Internet Assigned Numbers Authority to the Internet Corporation for Assigned Names and Numbers; affirmation of proposals from the NETmundial conference; research cooperation on New Generation Networks and Future Internet

Dialogue Seven
February 2016 (Tokyo)
Key Issues: Presentation on smart city concepts and the IoT; concern with data localization and other obstacles to cross-border data flows; coordination on domestic approaches to privacy

Dialogue Eight
September 2017 (Washington, DC)
Key Issues: Encouraged greater participation in APEC CBPR; reaffirmed bilateral coordination on digital trade concerns; shared information on cybersecurity challenges

Dialogue Nine
July 2018 (Washington, DC)
Key Issues: Harmonizing of domestic regulation on automated information technology and the IoT; joint session with US–Japan Cyber Dialogue on managing cyber risk; commitment to cooperation on digital trade rules

Dialogue Ten
October 2019 (Tokyo)
Key Issues: Welcomed Japan–US Digital Trade Agreement; partnership on digital policy issues in international forums; report from JUSDEP
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He recalled that the white paper started the ball rolling on this cooperation, but that it was the Great East Japan Earthquake and Tsunami of March 11, 2011, that in both countries reinforced the need for deeper collaboration on digital tools for disaster mitigation and recovery. This facilitated the development of bilateral Information and Communication Technology (ICT) Trade Principles, announced in 2012, which later became the basis for the digital chapter in the proposed TPP Agreement.

Sugihara added that US–Japan cooperation is now broader and deeper than ever, as evidenced by the close alignment of the nations’ positions in international forums and the important contribution that US companies are making to growth and innovation in Japan’s digital economy. Thinking about the way forward for this important digital relationship, he cited the following areas for attention:

- Steps to promote greater two-way trade in digital goods and services
- Continuing efforts to demonstrate the importance of US–Japan partnership on a global level (e.g., the recent US decision to sign on to AI principles developed in Japan as a counterpoint to a scheme championed by the EU)
- Consideration of delinking the Cross-Border Privacy Rules (CBPR) from Asia–Pacific Economic Cooperation (APEC) economies and bringing them under Japan’s Data Free Flow with Trust (DFFT) initiative

Sugihara concluded by urging both sides to “go deep and go wide.”

NEXT STEPS
The NDA Task Force has a one-year mandate to draft and research a white paper that can serve as a stimulus and a road map for cooperation with the Japanese government and business over the coming decade. The white paper is to be developed in cooperation with a major international consulting firm with a strong presence in Japan and significant experience in the digital policy and business space globally. Its starting point will be the views and interests of the ACCJ membership and the policies advocated by the US government in international forums.

As the drafting process advances, we expect to consult closely the relevant Japanese government ministries and agencies, as well as our colleagues in Keidanren and the broader Japanese business community. Our intention is for the new white paper to strengthen the habits of cooperation exemplified by the positive process response to the 2009 study, and “go deep and wide” in identifying new priorities and opportunities for future collaboration between the governments and business communities of the United States and Japan.
It is easy to look at the coronavirus pandemic and see only
negatives. The economic impact has been substantial, many
businesses have been forced to close, and both professional
and personal relationships have been strained—sometimes to
the breaking point. It has been a time of difficulties, no doubt, but
also a time of accelerated positive change and a transformative
moment for many things long discussed but not acted on.

Such is the case in the area of health, where nascent tech­
ologies and approaches to care have been forced into greater use.
This can only be a plus as digital tools and more abundant data
promise to transform how doctors serve patients, pharmaceutical
companies develop treatments, and governments provide support.

The time has come to fully leverage modern technologies
to reform outmoded systems and ways of thinking that were
crafted for a society of the past but no longer adequately serve
the needs of today, much less a future society in which an aged
population will put unprecedented pressure on the system.

DATA DRIVEN
Look around as you ride the train, attend meetings, or browse
stores. You’ll see many people using smartwatches, fitness bands,
and smartphones. These are mainstream examples of devices
that are increasingly gathering data about our health and fitness,
which we can use to manage our own activities and doctors can
use, with our consent, to diagnose problems.

Healthcare data has grown 878 percent since 2016, and with
more tools for gathering it coming to market and gaining traction
all the time, exponential growth can be expected each year for
some time to come. While this presents challenges in terms of
data management and security, it also brings opportunities for
doctors to provide better care and for pharmaceutical companies
to develop more effective treatments.

In the United States, the Food and Drug Administra­tion
(FDA) has its sights set on making digital a bigger part of how
it protects and promotes public health. In January, the agency
announced plans to hold a public meeting on March 27 entitled

Modernizing FDA’s Data Strategy to discuss possible agency­
level approaches to modernizing how it handles data quality,
stewardship, exchange, and analytics. After that announcement,
the realities of the coronavirus pandemic set in and the meeting
was postponed until June 30 (and held virtually). It was a
turn of events that served to highlight the importance of the
very topic at the heart of the meeting: the growing importance
doctors.

Japan is making its own headway and the country’s health
technology market is projected to grow from ¥86.9 billion
($824 million) this year to ¥225.3 billion ($2.2 billion) in 2025
as the nation adapts to the needs of an aging population and
looks for ways to provide care more efficiently.

COLLABORATION
Partnerships are forming between the two countries. Boston,
MA-based Akili Interactive Labs, Inc. and Osaka-based Shionigi
& Co., Ltd. are working together to commercialize Akili’s digital
medicines, AKL-T01 and AKL-T02, in Japan and Taiwan. Akili
creates prescription treatments for people living with cognitive
dysfunction and brain-related conditions. Shionigi is a major
research-driven pharmaceutical company focused on two

ADVOCACY

Health in the Digital Age

ACCJ white paper eyes post-virus overhaul

By C Bryan Jones
therapeutic areas: infectious diseases and central nervous system disorders.

AKL-T01 is currently under FDA review in the United States as a potential digital treatment for children with attention-deficit/hyperactivity disorder, and AKL-T02 is currently in late-stage development as a potential digital treatment for cognitive dysfunction and related symptoms in children with autism spectrum disorder. The digital treatments are delivered through immersive action video game experiences.

Another example of the drive for new ideas is the Digital Health Innovation Challenge for Inflammatory Bowel Disease (IBD), the first digital health open innovation challenge by American Chamber of Commerce in Japan (ACCJ) President’s Circle Member Eli Lilly and Company. In December, Eli Lilly named HealthVoyager, an application developed by Boston Children’s Hospital and Klick Health, as the winner of $50,000 and the opportunity to co-develop the app with Eli Lilly. HealthVoyager has the potential to leverage digital technologies to help those with IBS—an increasingly common ailment in the United States and Japan.

Eli Lilly is also teaming up with two other ACCJ member companies—AstraZeneca K.K. and Bayer Yakuhin, Ltd.—for the chamber’s Healthcare x Digital initiative to encourage Japanese startups to innovate and to connect them with US companies.

CHAMBER VIEW
As the ACCJ is dedicated to ensuring a vibrant environment for global business in Japan, advocacy for improved health policy and initiatives is an important part of the chamber’s mission.

One reason that foreign companies choose to invest in Japan is the nation’s high-quality manufacturing and services sectors, as well as its technological prowess and innovative workforce. Maintaining the health of the population is, therefore, critical to the future prosperity of the country and the viability of its business environment.

Recognizing this, the ACCJ has worked with the Institute for New Era Strategy (INES) to bring together key leaders in business, government, and academia to discuss the future shape of social security in Japan, and the results will be revealed later this year in the form of a white paper from the Healthcare Committee.
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Our evolution as a data-based society has allowed us to grasp the impact of Covid-19 in real time, and digital tools have enabled the active cooperation of civil society as the government works to mitigate the threat and limit its damage. While this is an encouraging sign that bodes well for the future of Japanese society, the state of Japan’s infrastructure has been inadequate compared with other countries.

The ACCJ and INES hope to provide ideas on how to build a stronger infrastructure through post-Covid-19 recommendations on how to realize a social security system for all generations, and to promote continued innovation and application of technology that can help Japan provide for the needs of its people in a way that is effective and fiscally sustainable.

The paper will identify three areas considered extremely important:

- Utilizing data technology
- Shifting financial resources to healthcare and retirement
- Raising the health and financial literacy of society

In terms of digital health and utilizing data technology, areas of focus will include:

- Information usage rights
- Data collection
- Database integration
- Public–private collaboration
- Telehealth and virtual care

In the case of the last item, the Covid-19 pandemic has thrust this need to the forefront. As most people have been forced to shelter in place for extended periods, quarantine, or limit visits to clinics and hospitals, healthcare services at a distance has been the only way for many patients and doctors to interact. Particularly those in high-risk categories due to preexisting conditions, and those living in rural areas, have relied on telehealth services to minimize the risk of infection during the pandemic.

One concern is that, once an effective coronavirus vaccine has been found, some digital initiatives that have been embraced might fall by the wayside as Japan returns to normal routines.

One recommendation from the joint ACCJ–INES team states: “It is essential to couple the support for telehealth with support for digital prescriptions, and to enable pharmacies to offer home delivery of important medications, all while expanding the overall role of digital technologies in delivering care. These measures will help support the aging population long after Covid-19, and enable new approaches to triaging, screening, and following up, customizing the patient experience, and improving the ability of doctors to monitor and communicate with their patients.”

Doing this will require a change in mindset and policy. While many forms of digital data exist in Japan, the individual’s consent is often not obtained at the time of collection, making it impossible to utilize the information. Even if the data is in the government’s possession, it is still difficult for it to be leveraged due to privacy considerations.

But with Japan’s fiscal strains exacerbated by the coronavirus, now is the time for the government to tackle these challenges. Strong political will and leadership are required to face reality, make the right choices, and share with the public a vision for a better future. And today’s digital tools and the power of data are making this possible and opening a door to a healthier, sustainable tomorrow.
The coronavirus pandemic has highlighted ways in which Japan lags other leading economies when it comes to harnessing digital technology to make access to healthcare more convenient and efficient—an increasingly vital need as the population ages and the ranks of elderly swell, burdening government spending.

Only a limited number of Japanese hospitals and clinics offer telehealth services, which allow patients to connect with doctors online or through video calls for medication management, follow-up care, and even diagnoses. The Ministry of Health, Labour and Welfare published a list in April of 10,000 medical clinics that offer such services for first-time patients, but it includes only about one-tenth of the nation’s total facilities.

Digital or mail-order prescriptions are also rare in Japan, where you typically need to fill prescriptions at the local pharmacy. Japan has also been slow to consolidate an individual’s health data in a single digital location. Many of these services are becoming more common not only in the West but in Asian countries such as Singapore and India as well, and Japan risks being left behind.

“Japan is taking steps forward, but still, relative to other leading countries, it lags behind as of today,” said Yasuhiro Iida, director of consumer experience at Eli Lilly Japan K.K.

Embracing these changes will benefit the patient first and foremost, pharmaceutical industry executives told The ACCJ Journal.

“Whether it’s having access to all of your health records in one place, better health outcomes as a result of better coordinated and managed care delivery, or simply more options to improve the treatment experience, accelerating efforts in the use of digital technologies in healthcare will benefit the patient,” said John Carlson, who serves as chair of the American Chamber of Commerce in Japan (ACCJ) Healthcare Committee.

CENTRAL SAVINGS
Digital transformation will also help save money in health insurance costs at a time when they are projected to surge. Those aged 65 or over exceed 27 percent of the population, and that number is expected to reach 38 percent by 2060.

Japan boasts one of the world’s highest-quality healthcare systems, but Bayer Yakuhin, Ltd. Head of Strategy and Digital Transformation Francisco Proaño wonders how the government will provide care to a potentially greater number of patients while facing a decline in the working population and strains on economic growth and tax revenue.

Also, given the heavily regulated nature of Japan’s healthcare sector, getting the government involved from an early stage is vital, the executives said. “It will be critical that the public and private sector come together to chart a new course for digital technology utilization in healthcare,” stressed Carlson.
CREATIVE CONTEST

To help Japan move in this direction, the ACCJ’s Kansai chapter has launched an initiative dubbed Healthcare x Digital that brings together startups, established pharmaceutical companies, and public officials to chart a way forward.

The initiative will kick off with a competition scheduled for October 29. Startups will be invited to pitch ideas to be evaluated by executives from the three major Kansai-based corporations leading the program, Eli Lilly, Bayer, and AstraZeneca K.K. Officials from Google Japan G.K., Cisco Systems G.K., and the Japanese government will also be invited to attend.

“The objective is to help drive innovation in the Japanese healthcare system and market for us to better serve patients,” said Iida. Startups from around the world are welcome to enter, but contestants will probably be mostly Japanese.

“We are open to any company that wants to contribute to the Japanese healthcare market and patients,” he said.

Organizers hope the contest, similar to the XPRIZE competition meant to spur industry-changing technologies, will attract 10–15 teams that will each give a 20-minute presentation. Three prizes will be awarded:

- Teamwork
- Moonshot Prize for Innovative Thinking
- Best Overall Idea

Prize money has yet to be determined, but the biggest benefit for winners will be something far more important: possible financial backing from a major player to develop their ideas and make them a reality.

“The prizes are incentives to join,” said Iida. “But the real outcome should be that we identify a couple of real ideas that can become a project we can all work on together.”

For both private and public sponsors, the contest will provide exclusive exposure to new ideas and new relationships with some of Japan’s most innovative thinkers, according to the contest’s description.

Entries will be judged on several criteria, including expertise, to assess the relevance and maturity of the team’s experience and skill mix, and the strength of the startup’s vision and strategy. Other factors include how innovative the idea is, the startup’s flexibility, and the scalability of the idea.

APPS AND CONNECTIONS

One new area generating buzz is the development of new digital therapeutics and technologies that directly support care. For example, regulators recently approved an app that helps people stop smoking. “This is an area of interest among biopharmaceutical companies,” said Carlson. “How do we develop a wider portfolio of offers, pairing our traditional biopharma products with new digital tools that can support a patient’s care?”
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Another area ripe for development is setting up online systems for connecting doctors, patients, and pharmacies. “Pharmacists should be able to send the medicine to the home, but at this point in time a very small percentage of patients can rely on an online system,” said Iida. “Generally, prescribed drugs need to be picked up at the pharmacy. There’s no online connection between the hospitals and the pharmacy system.”

And in a competitive industry such as pharmaceuticals, for major players to cooperate in developing ideas and new systems is somewhat unusual. “We’ll hold this event together to come up with a common theme or idea which the three companies can work on together to drive change in Japan’s healthcare environment,” said Iida. “We are happy to have other companies join the agenda.”

REGULATIONS
Japan has a very carefully regulated pharmaceutical industry, and getting government engagement from an early stage is key to the event, organizers say. The clinical efficiency and safety of new products are evaluated by the Pharmaceuticals and Medical Devices Agency, and the reimbursement of all medical services and technologies is closely overseen by the Central Social Insurance Medical Council, also known as Chuikyo.

The idea is to “talk about regulations together, not only embracing new ideas and technologies,” said Iida. “But without the right regulations nothing in healthcare could fly.”

One hoped-for result of the initiative is to encourage the government to make it easier for innovative ideas to reach the market. “It seems that regulations around startups have room to be improved in order for them to accelerate their activities,” said Mika Shirai, director of public relations at AstraZeneca.

WIN–WIN–WIN
Organizers describe the contest and broader initiative as a win–win–win opportunity for all involved, connecting parties who rarely, if ever, are in the same room.

Pharmaceutical companies acknowledge that they need fresh ideas from outside the industry. “Bayer management recognizes that great solutions are out there in the innovative hearts and minds of tech-savvy Japanese and foreign entrepreneurs and innovators, and that we don’t hold the answers for all the questions,” said Proaño.

Iida said: “Just trying to incrementally improve what pharma has been doing won’t create a future. Venture companies, meanwhile, have great ideas, but don’t have a network and the assets to develop their ideas alone.”

Overall, everyone—patients, startups, established players, and the government—have much to gain from the efforts and closer collaboration. And Japan’s rapidly aging population makes the need all the more urgent. “Change is happening in bits and pieces, but it’s not like a holistic ecosystem is emerging,” said Iida. “Japan has a digital infrastructure and an aging society, so we have enough motivation.”

Japan’s paper-based system must be digitized.
When disaster strikes, leaders rise to the challenge and turn hardship into opportunity. Angela Ortiz found impetus in the aftermath of the Great East Japan Earthquake and Tsunami of March 11, 2011, that would lead her to establish a non-profit organization (NPO) devoted to helping children.

After forming Place to Grow in 2015—a rebranding of OGA for Aid, which was founded in 2011—Ortiz took her social and environmental passion to the business world as a manager of corporate social responsibility (CSR) projects. Along the way, she earned what she calls her grit MBA and identified eight principles that she believes are essential to becoming an effective leader in social impact, which she has gathered in a new book entitled *Place to Grow*. The ACCJ Journal talked to 38-year-old Ortiz, who serves as CSR senior manager for adidas Japan K.K., to learn more.

**Tell us about your background.**

I moved to Japan as a young child with my parents and siblings in the mid-1980s. My father is from Colombia and was raised in Rome, Italy, where my grandfather was working for the United Nations in the 1960s and ‘70s. My Mother is from El Paso, Texas. Both come from large families—my mom has eight siblings and my dad has six—and have a flair for adventure. It was that common ground that not only kept them moving and traveling together as they raised 11 children but also led them to call Aomori home 40 years later. They run an international kindergarten there and enjoy welcoming travelers to their Airbnb business.

I spent a great deal of time growing up in suburban and rural Japan before choosing Tokyo as my home. My siblings are scattered around Japan, Australia, and the United States. Like our parents, the love of the outdoors brings us together and I recall many happy childhood adventures exploring rivers and trails in the mountains of Yamanashi, Gunma, and Saitama.

As a young adult, I chose early childhood education as my first career path and moved to Tokyo with my daughter in 2005 to work in the international kindergarten community. There, I taught preschool and pre-first grade for six years before the earthquake struck in 2011.

**What do you mean by grit MBA?**

Once upon a time, I was sitting in the office of a very well-to-do, global leader, lawyer, and philanthropist. Her office was in the Prudential Towers in Akasaka, and had plush leather couches and a killer view. I was nervous, but calm, as I desperately tried to explain the goals, vision, and strategy of the project we were trying to fund. I was rambling about possibilities and partners, local ownership growth, and the return on investment. I shared the NPO business model and fumbled through projections of expected growth. She eyed me sharply the whole time. Inside, I was a jumble of emotions and I was impressed by her. She was very accomplished, and I’d never met anyone with the likes of her presence.
I was also desperately determined to make this NPO work, because I was emotionally—and now professionally—invested in helping the many survivors of Minamisanriku, a town in Miyagi Prefecture, rebuild their homes. For this social enterprise to work, I had to learn the entrepreneurial, technical, and management skills needed for the project and the NPO.

She gave me what felt like 101 suggestions to get the proposal ready for donors. I frantically took notes, highlighting words and terms that I would need to google later. She looked at me, then at the project proposal, picked it up, and came around the desk. With her hand splayed across the front page of the 150-page document, she looked me clear in the eye, handed the proposal back, and said, “This is your grit MBA, Angela.”

Having been told I had, in a sense, earned a degree through experience and hard work, I walked out the door thanking her, excited, full of energy and hope.

As I look back now, I realize that I was given the invaluable opportunity of a front-row seat, a hands-on learning experience of what makes or breaks a strong society. When everything is destroyed—all the infrastructure and processes that make a functioning society work are reduced to zero—how and where do you start to rebuild? How do people work across sectors, cities, neighborhoods, countries, policies, races, and even genders? What type of skills are required to create spaces for growth and collaboration? I learned, by watching and practicing and failing forward, what is required to hold and keep these conversations going.

Why did you found Place to Grow?
The disasters hit the Tohoku region of Japan, which was near my Japan hometown of Aomori. My brother, who lived in Sendai, had to evacuate, and my family got involved right away, doing whatever we could. At first, I joined the emergency relief efforts because I wanted to take action. I chose to stay involved because, when faced with the need, which was overwhelming and glaring in my face, I realized that if I wanted to—if I chose to—I could be of service to the people and friends I had in the impacted area.

I remember one experience, just after the earthquake, that affected me. My friend Yosuke Watanabe and I were outside the Hotel Kanyo having coffee. Our mini mug cups were wrapped in

We have two free signed copies of Place to Grow for ACCJ members.
To enter, email: coordinator@custom-media.com
Winners will be picked at random on September 1.
Saran wrap first and then filled with instant coffee grounds and hot water. It was a real luxury during those days after the disaster. It was March 24 and we would be going back to Aomori the next morning after having spent three days living with survivors. I asked him what his plans were, thinking maybe he would return to his hometown. He said he wasn’t sure. I asked, “Will the hotel still be able to employ you? What about your wife’s job? How is your baby girl? Will the town rebuild itself?” Every question was met with a shake of his head and a shrug.

My own ego, I think, reeled as he responded again and again and again with a calm but shaky “I don’t know.” I had never felt completely uncertain in my life, so I couldn’t relate to him 100 percent. But I have felt enough insecurity in life to imagine just enough to be completely floored. “Yosuke, not knowing what will happen to you, how do you manage such a brave face?” I asked emotionally. He responded: “When volunteers are here, people are motivated and have strength. When they leave, people will fall into depression and exhaustion.”

This conversation has never left me. It did not stir pity in me, though I felt plenty of sympathy. I was intrigued—and a little confused—by the way in which our first efforts of aid had turned out. I knew I had to understand more about the logistics side, of course, but also about the human component. I felt compelled in a way I’d never experienced.

How does Place to Grow help the community?
Place to Grow (placetogrow-ngo.org) is a 100-percent volunteer-led nonprofit that strives to inspire and connect a rising generation of young leaders in Tohoku through fitness and language exchange. This is our mission, which:

- Creates spaces and chances for leadership development
- Builds relationships among town and external leaders
- Inspires youth through culture-exchange workshops

What are your eight principles?
Leadership of any kind starts with self-leadership. The first of the eight principles, “You matter when you choose to,” is about deciding to make a difference in whatever field it is you care about. The eight principles are:

- You matter when you choose to
- Why the details matter so much
- Competition vs. camaraderie
- Why “inclusion in support” is vitally important
- What does my ego have to do with it?
- “Fail forward” successfully
- Take care of yourself so you can take care of others
- “People inspire people” and you benefit from inspiring others

These comprise what I believe is a solid and well-rounded mindset for anyone who wants to make an impact in society. These are crucially important understandings of human interaction, emotions, and community connections.

The goal of my book is to enable the creation of a leader’s mindset in the reader. My hope is that it will help those who wish to become adept and creative leaders who deliver social impact.

The thing is, you make an impact in your social circle just by existing, whether you want to or not. So why not be intentional about it? When the world goes to chaos, I think it highlights the need for the basic human values that make society not just function but a joyful place for us to exist.

Now, more than ever, we need intentional leaders who will step up and choose to share and exchange insights, establish collective impact projects, and cooperate so that we, as a society, can have a fighting chance to overcome the many social and environmental challenges we face.
How does Covid-19 compare with March 11?

Periods of chaos and crisis act as an accelerator of underlying social issues. There are challenges, but also an opportunity for leadership growth and new understanding, as well as movement and changes in political, corporate, civil, and personal behavior. Times like this create changes in what we as residents and citizens expect of ourselves and our leaders.

What advice do you have for leaders of global staff?

Lead by example. Walk the talk of inclusion. International social circles can either be incredibly strong, because the team is actively choosing to apply its strongest aspects, or weak because unexplored differences will foster distrust.

Leaders do not inspire loyalty and action by having the most sophisticated solutions. They inspire trust and camaraderie among diverse teams by acknowledging that differences exist, and they lead in learning about those differences without judgement. They lead in open-mindedness. They lead in vulnerable determination to continue trying, to keep showing up.

As American research professor and author Brené Brown said: “It turns out that trust is, in fact, earned in the smallest of moments. It is earned not through heroic deeds, or even highly visible actions, but through paying attention, listening, and gestures of genuine care and connection.”

Why is the role of the ACCJ important?

Innovation, creativity, and peer-to-peer role models are ideas that come to mind when I think of the value of the ACCJ. Collaborative social innovation is going to be in high demand in the coming decades, and communities such as the ACCJ create spaces for people to engage in creative, collaborative ideation and exchange that allows members to leave their social and cultural constructs at the door and embrace the ideas that lie between the cultures.

How do you see the role of CSR evolving?

I believe the needs will require these roles to become long-term partnership creators and builders. Purpose-driven brands, CSR, and social impact programs will work to drive systemic change across sectors and industries. Nonprofits with specific expertise and connections will remain powerful partners to maintain the long-term conversations needed to impact societal change on granular levels.

With climate change, the plastics crisis, human rights, gender and race equality, and Covid-19 our interconnected global business community is focused more than ever on sustainable solutions. Cross-sector collective impact programs will become essential components of business. Individuals with experience and literacy in sustainable social impact will be in demand wherever they go.

Any final thoughts?

Make time to volunteer. Time spent as a volunteer with the right attitude will provide you with invaluable hands-on experiences. When this time is complemented with the right mindset, it can accelerate your growth game in any profession, whether you later decide to work in nonprofit, academia, or the governmental and political sectors, or with a start-up, corporate leader, or even run a small business.

This is because at the core of the volunteer experience is a lesson in human connection.
Among the first to decide to draw down its presence in Hong Kong was The New York Times, which announced on July 14 that it was relocating its digital editing team from the former British colony to Seoul, South Korea. Explaining the move, the Times said a new national security law passed by Beijing had “unsettled news organizations and created uncertainty about the city’s prospects as a hub for journalism.”

One week later, Naver, South Korea’s largest internet portal, confirmed that it was moving its overseas backup data center from Hong Kong to Singapore, due to concerns that Chinese authorities could use the far-reaching new legislation to access user information.

Media corporations arguably have greater reason than multinationals in other sectors to be wary of the vastly increased powers that the law hands to Beijing, but there are suggestions that companies in finance, property, insurance, and other areas are also watching the Chinese authorities’ moves very carefully.

Hong Kong’s financial regulators have admitted to being approached by a number of institutions with reservations about the new legal framework in the city, a situation made worse by the deepening geopolitical divide—and its impact on trade—between Washington and Beijing.

In mid-July, US President Donald Trump signed an executive order ending Hong Kong’s preferential trade status, ruling out, “Special privileges, no special economic treatment, and no export of sensitive technologies.”

Japan is also monitoring the changes closely, although for different reasons: it presents a possible opportunity to attract more foreign direct investment (FDI). Tokyo is hoping to convince companies that are concerned about potentially greater oversight and control of their operations, as well as reduced freedoms for their staff, to transfer at least some functions and facilities here. In a best-case scenario, multinationals might even shift their Asia–Pacific headquarters to Japan.

Anticipating passage of the new law, the Japanese government in June announced a series of initiatives designed to make Tokyo more appealing to foreign companies—particularly those in the financial sector—with Prime Minister Shinzo Abe making his aims clear by declaring that Japan would welcome “foreign talent with specialized and technical abilities, including from Hong Kong.”

**TOKYO ALLURE**

While some of the government’s proposed incentives are a step in the right direction, people in business in Japan say they do not solve all the problems facing foreign companies here—the high tax rate being the biggest concern for many. And until more effective changes are implemented, they warn, companies may opt to take their chances in Hong Kong or look to another major regional city.

“If Hong Kong is now considered problematic for some companies, the main alternatives for an Asia–Pacific headquarters will come down to either Tokyo or Singapore,” said Ken Lebrun, co-chair of the American Chamber of Commerce in Japan.

KEN LEBRUN
Partner
Davis Polk & Wardell LLP
Co-chair
FDI and Global Economic Cooperation Committee
Foreign staff are not usually taxed on their worldwide income by their home countries, although US nationals are, he said. This makes working in Singapore, compared with Tokyo, much more attractive to non-US expat staff. And when an expat employee asks the company to make up the difference in their personal taxes in Tokyo, it becomes a very expensive proposition. This is not a cost encountered in Singapore, for example, and it can be a deal-breaker for some large companies, he admits.

Similarly, the corporate tax rate is higher in Japan than elsewhere in the region, and that obviously impacts board-level decisions.

Another consideration is the extremely tight labor pool for multinationals in Japan.

“The resident labor pool is already tight due to Japan’s demographics, but when a company is looking for bilingual Japanese with the experience to manage international operations, then that subset is really small,” Lebrun said.

And while foreign companies have a good track record of hiring talented female employees who might not have had so many career opportunities in a traditional Japanese workplace, many Japanese men still appear to prefer "to work for a Japanese company rather than take the risk of joining a foreign multinational."

**GOVT ACTION**

Still, Abe and his administration recognize the opportunity that exists today and the benefits this might bring to the national economy. As early as 2019, the Liberal Democratic Party (LDP) included in its campaign for the upper house election calls for Tokyo to grow into an international financial hub on a par with New York and London. These are the two cities that Tokyo perennially trails in the Mori Memorial Foundation’s Global Power City Index.

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**Corporate Tax Rates**

<table>
<thead>
<tr>
<th>Country</th>
<th>Tax Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>25%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>16.5%</td>
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<tr>
<td>Japan</td>
<td>30.62%</td>
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<tr>
<td>Singapore</td>
<td>17%</td>
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<tr>
<td>South Korea</td>
<td>25%</td>
</tr>
<tr>
<td>Thailand</td>
<td>20%</td>
</tr>
</tbody>
</table>

**Why Tokyo?**

**Pros:**
- Safe, stable, rich society
- Educated workforce
- Strong, global economy
- Strong work ethic
- Easy to start company
- Good infrastructure

**Cons:**
- Complex bureaucracy
- Few short-term gains
- High taxes and prices
- Fickle consumers
- Little English spoken
- Labor shortage
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The LDP set up an economic growth strategy group and released a list of recommendations that could make that happen. The proposals include:

- Relaxing banking regulations
- Introducing new working styles
- Simplifying permanent residency
- Improving corporate governance
- Offering tax breaks to businesses
- Reducing corporate rents
- Introducing 5G technology
- Emphasizing environmental and social issues

The tax proposal tacitly acknowledged that the current rates present a major hurdle for foreign companies and suggested an “offshore zone” that would be separate from Japan’s existing tax system.

Lebrun is not convinced that the suggestion will gain sufficient traction to be adopted.

“Ideas for special tax classes or exemptions just do not fit with the Japanese concept of fairness, and I do not think they are politically realistic,” he said. “I agree they could attract businesses and be good for the national economy, but I do not believe they would fit in with the concept of equal treatment.”

**POTENTIAL BENEFITS**

Bryan Norton, the other co-chair of the FDI and Global Economic Cooperation Committee and director of Fusion Systems Group, is similarly a long-term resident of Tokyo and believes there are many positives for companies wanting to set up in Japan—although the ongoing pandemic means that is unlikely to happen on a large scale in the immediate future.

“I choose to stay and do business in Japan because it is safe and the government provides a very respectable range of support services which are available to everyone, including foreigners who have lived in Japan for a number of years,” he said.

“Setting up a company in Japan is very easy, and banks will lend to businesspeople with good ideas and some kind of track record,” he added. “Recently, the Japanese government provided access to emergency funding to SMEs to help them survive the recent Covid-19 shutdown. In my experience, the Japanese government is very supportive of both small and large companies.”

Another factor in Japan’s favor is the relatively low number of coronavirus cases and an economy “that should continue picking up pace,” Norton said, adding that the rule of law and transparency are also appealing traits.

Norton also believes that land and rent prices will contract to the point that they are cheaper than those in Singapore and Hong Kong because the economic windfall from the Games never materialized in 2020 and is in serious doubt for the summer of 2021. “If I am right, then Tokyo could become more attractive as a business center, compared with Hong Kong, China, or Singapore, due to a significant amount of modern office space and other infrastructure available at reasonable cost.”

Given that the only certainty in business is uncertainty for the foreseeable future, the Japanese government may see its hopes of attracting businesses to Tokyo come true. But the single biggest change it could implement to encourage relocation would be to address concerns surrounding taxation.
For non-Japanese passport holders who work or run businesses in Japan, border restrictions meant to control the spread of Covid-19 have presented a hard choice: stay in Japan or risk temporarily losing your right to live here. Some 208,000 non-Japanese residents have been stranded abroad, and the hard-line stance that most foreign residents—even those with permanent residency status—cannot reenter the country is disrupting lives and tarnishing the nation’s image as a welcoming place for global business.

Japan put border protections in place on April 3, and as of July 24 bans entry of foreign travelers arriving from 146 countries or regions. Those “who will arrive in Japan with a flight via any of those 146 countries or regions which are subject to denial of permission to entry, with a purpose of refueling or transit, will also be denied to enter Japan in principle. This will apply regardless of whether they have entered those countries or regions or not,” according to the Ministry of Foreign Affairs border enforcement measures to prevent the spread of novel coronavirus.

The measures also state that “all nationals arriving from all regions are called upon to wait 14 days at a location designated by the quarantine station chief and to refrain from using public transportation until the last day of August.”

Of course it is necessary to guard against the spread of Covid-19, but the same restrictions are not being applied to Japanese citizens. It is this unequal application of rules meant simply to contain a virus that has many in the business community concerned. The government has indicated a willingness to loosen the reins, and exceptions and new procedures have been announced in recent weeks, but most agree that it is still too little to address the real problem.

RAISING THE ISSUE
On July 7, the American Chamber of Commerce in Japan (ACCJ) expressed concerns regarding the limitations on reentry in its second official statement on the matter.

“The ACCJ understands and supports Japan’s efforts to protect itself from further spread of the virus, including Japan’s decision to enforce a mandatory 14-day quarantine on those returning to Japan from countries where the risk is greatest. We also recognize the progress in clarifying the conditions and criteria for, and the process under which, foreign residents of Japan may receive permission to reenter Japan for humanitarian reasons,” the chamber wrote. “We are concerned, however, that the prohibition currently in place on the entry into Japan of foreign nationals who have a permanent abode, family, and work base in Japan is detrimental to Japan’s long-term interests, in particular as to Japan’s attractiveness as a place to invest and station managerial employees with regional responsibility.”

It is this category of those who live in and work in Japan—who are raising families and own companies here—that is at the core of the debate. Even someone who has been a permanent resident for 30 years, contributing the same tax money to
society as any Japanese citizen, is barred from reentering the country at the time of this writing.

Expressing appreciation that the Japanese government treated the foreign community on an equal basis when determining eligibility for the ¥100,000 per-person Covid-19 stimulus payment, the ACCJ also noted that “through the payment of local and national taxes, the consumption of goods and services from the local economy, and the support for companies both local and international, Japan’s foreign residents and workers play an important role in ensuring Japan’s economic growth and good relations with global partners. Their contributions will be all the more important as Japan looks to recover from the economic impact of the Covid-19 pandemic.”

In other words, global business is critical, and locking out those from abroad who have dedicated their talents and energy to building a strong business community in Japan is not in the country’s long-term best interest.

“Foreign residents of Japan who have made a decision to build a life here and contribute to the Japanese economy should not be subject to a double standard restricting their travel, economic, and familial opportunities based on nationality,” said ACCJ Chairman Christopher J. LaFleur.

“While we applaud and support the Japanese government’s efforts to manage the Covid-19 crisis, a resident’s nationality provides no basis on which to assess risk or assign travel privilege in relation to Covid-19.”

The ACCJ has also made a request that the Japanese government establish a reentry permit or process whereby travelers entering Japan under the humanitarian exception can receive an assurance that they will be admitted before they board flights bound for the country.

**BUSINESS IMPACT**

Many members of the business community have shared stories of the uncertainties being caused by the reentry restrictions. Mark Borer has called Japan home for more than 25 years. He is a permanent resident and his wife, Akiko, is a Japanese citizen. The couple owns a small business with 20 employees in Japan, and Mark manages a real estate business in the United States as well. They also care for their parents in both countries.

“This is a huge dilemma as it is impossible for me to manage my business in the United States or care for my family unless I decide to give up my life in Japan indefinitely,” Borer said. “If the present arrangements continue, we will be faced with very difficult choices.”

Although he understands that certain precautions and restrictions are necessary, Borer hopes the Japanese government will allow permanent residents to reenter under the same conditions as Japanese nationals, in a manner similar to other G7 countries.

“Aside from the logistical issues, as long-term taxpayers and supporters of the economy and our coworkers, the unusual treatment of permanent residents is an unfortunate disap-

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**Requirements for Reentry**

- Confirmation letter from local Japanese embassy
- Monitoring of health for 14 days prior to arrival
- Self-isolation for 14 days after arrival
- Use of the government-sponsored tracking app
pointment. This is our home, and we sincerely wish for a reconsideration of the reentry ban so that it can continue to be home for long into the future.”

An ACCJ member who asked to remain anonymous explained that their company—which continues to pay rent, utilities, and taxes despite being shut out of its Tokyo-based property—is trying to maintain its position in Japan, but at some point soon will reach a financial limit. They pointed out three ways in which they and their business are being impacted:

- The company is making a significant investment to maintain an in-country presence in what is currently a strategic growth market
- Delays in product deliveries, contract awards, sales campaigns, and new business development will hold up expected positive cash flow, resulting in lost investments that might never be recovered
- Personal reputations in Japan, carefully developed over many years, are now at risk

Others have shared examples such as clients who need to transfer senior executives and other personnel to Japan but cannot despite those individuals qualifying for visas and agreeing to undergo quarantine.

**SIGNS OF HOPE**

With a surge in new coronavirus cases being seen in Japan and abroad, loosening travel restrictions requires careful consideration—but the calls for change have not entirely fallen on deaf ears. The government announced in mid-July that it would consider easing restrictions, and on July 22 said it would “incrementally permit reentry or entry into Japan by foreign nationals who possess a status of residence and others.”

About 88,000 students and skilled workers who left prior to the ban will reportedly be the first to have their reentry requests considered.

The new procedures will be applied to four categories:

- Permanent Resident
- Spouse or Child of Japanese National
- Spouse or Child of Permanent Resident
- Long-term Resident

*Business Bubbles*

Japan is working on a special exception program to allow travel for business executives from:

- Australia
- Brunei
- Cambodia
- China
- Hong Kong
- Laos
- Macao
- Mongolia
- Myanmar
- New Zealand
- Singapore
- South Korea
- Taiwan
- Vietnam

Health screenings are part of reentry requirements.
The ministry notes that “the relaxation is only applied to those who have left Japan with a reentry permit before the day when the country or region where such foreign nationals are currently staying was designated as an area subject to denial of permission for entry into Japan.”

In a July 31 update to the Consular Services’ “Re-entry of foreign nationals who possess the status of residence” page, under the new decision, those who meet the new criteria will be allowed to reenter Japan beginning August 5.

There are some conditions, however, and a controversial one is the requirement of a negative polymerase chain reaction (PCR) test for Covid-19 antibodies conducted within 72 hours of arrival. Given the continued testing bottleneck and slow return of results being seen around the world, it may prove difficult to meet this condition.

Other requirements include:

- Reentry confirmation letter from local Japanese embassy
- Monitoring of health for 14 days prior to arrival
- Self-isolation for 14 days after arrival
- Use of the government-sponsored tracking app

However, the easing of rules does not apply to those who left the country after the reentry restrictions were put in place on April 3. So, for many who had to travel for family emergencies or other critical matters, the future remains uncertain.

SPECIAL CASES

Additional progress was made on August 5 when the Japanese government announced that it would allow foreign nationals who teach at international schools to reenter the country. The exception applies to those who had left the country and need to return as well as to teachers who are entering Japan for the first time, and their family members will also be admitted.

At the press conference, which covered a range of topics, Japanese Foreign Minister Toshimitsu Motegi explained the decision.

“For organizations mainly conducting elementary and secondary education, from the perspective of ensuring the right of children to receive education, we will allow new entry and reentry to Japan by human resources that are difficult to find adequate replacements for within Japan, as they have special circumstances that make them exceptions to denial to enter Japan,” he said.

“From this perspective, coordination has been conducted with related ministries and agencies to allow reentry by teachers at international schools and their families who have status of residence in Japan, as well as entry into Japan by newly appointed teachers.”

FUTURE PHASES

Expanding reentry depends in part on testing capacity. Through July, only about 2,300 PCR tests could be conducted at Japan’s major airports each day. The government has been working to nearly double this number to 4,000 by August 1 and plans to open PCR centers at Haneda, Narita, and Kansai International Airports by September to allow for testing of up to 10,000 travelers per day at each facility.

With an eye on the economy, Japan has been considering special exceptions for business executives. Visitors from Vietnam and Thailand will be the first to gain entry under a new program to create travel bubbles within the region, but Japan is also in talks with Australia, Brunei, Cambodia, China, Hong Kong, Laos, Macau, Mongolia, Myanmar, New Zealand, Singapore, South Korea, and Taiwan. The United States and Europe, however, are not on the list of potential negotiations at this time.

For businesspeople there, Japan is reportedly considering admitting a small number for a limited time. Such visitors would be required to travel by private jet and may only stay in the country for 72 hours.

Just how long the ban will remain in place is unclear, although there is hope that more residents stuck abroad can return in September, and greater business travel will also be possible.

That’s important because, while the coronavirus threat is far from gone—and is, in fact, surging in areas of Japan and around the world—opportunities have arisen for Tokyo to attract foreign companies and advance its goal of becoming a global financial hub (page 32). But if Japan is seen as unwelcoming to travelers or as an unpredictable place to live and work, the long-term business impact could be significant.
When Bob Harris, the jaded movie star played by Bill Murray in the 2003 film *Lost in Translation*, flies to Tokyo to advertise Suntory’s Hibiki 17-year-old blended whisky, he behaves in a way that now seems reckless. He sings at a karaoke club, rides in a packed elevator, and drinks in a crowded hotel bar. “For relaxing times, make it Suntory time,” Murray’s character declares.

These are not relaxing times for Suntory Holdings Limited. Its biggest market, Japan, has only recently emerged from a Covid-19-induced state of emergency that emptied out bars, restaurants, and karaoke clubs. Although customers are now tentatively returning to entertainment venues, the outlook for the drinks business is one of prolonged upheaval.

It follows a long period of global growth for the company, which rode two decades of surging popularity for Japanese whisky, followed by a “premiumization” of the drinks business, as younger drinkers turned to craft spirits or single malts from historic distilleries, such as Suntory’s fabled Yamazaki. Suntory now faces fundamental questions about the way it operates.

If customers have less money in the economic downturn, will they still pay higher prices for expensive spirits? If large gatherings are restricted, will they socialize in smaller groups or just stay at home?

“Suntory loves human contact, which is an instinct of human life,” the company’s CEO Takeshi Niinami said in an interview with the *Nikkei Asian Review*. “People are a bit stressed out by working from home, so I don’t think on-premise will disappear. It will thrive, but not at such a scale. It is obvious that we will reduce gatherings, but people will still gather, maybe in their neighborhoods, so local bars and restaurants will have more of a chance.”

To thrive, Niinami believes that spirit makers will have to be imaginative. Suntory has innovated its way out of crises before, but this time the challenge is enormous. The pandemic has put everything from premiumization to the business model of bars in question. Niinami, a Harvard-educated executive who spent 12 years in charge of the convenience store chain Lawson before coming to Suntory, knows his company must prepare for change.

“We have to be creative in how people can be connected. Don’t give up,” Niinami said. “I am encouraging our senior executives to see what we can do. We are thinking about new occasions for people [to gather] and what we can offer, such as a new cocktail. Something to cheer people up.”

But adapting will be costly for companies with traditional marketing and distribution models. Suntory is also heavily focused on a few countries while its rivals, such as Diageo, are more diversified. “Suntory’s key weakness is that it is highly reliant on just two markets: Japan and the United States,” said Matthew Barry, a consultant at the research group Euromonitor International. “Covid-related problems in either of the two, whether from new lockdowns, a recession, or both, would hit Suntory hard.”
**HIGH TIMES AND HIGHBALLS**

The distinctive taste of Suntory’s single malts comes from Osaka and the surrounding Kansai region, the rice-growing heart of Japan.

“If you gave someone a bowl of udon soup in Osaka and they had a Suntory whisky, they would understand the connection,” said Brian Ashcraft, author of *Japanese Whisky: The Ultimate Guide to the World’s Most Desirable Spirit*. “Suntory is, first and foremost, a whisky company and, first and foremost, an Osaka company. Its whiskies are very balanced and do not overwhelm you the way that others can.”

Kansai spring water is a key ingredient, but Japanese distillers tend to use imported barley, relying on maturation and blending to make a distinctive spirit. “They are using Scottish copper stills, often importing barley from Scotland. But the warmer environment there is a catalyst for all kinds of reactions,” said Jonny Fowle, spirits specialist at the auction house Sotheby’s.

“There is a more intense maturation that creates a really distinctive taste, with dried fruits and spices.”

Suntory was founded by Shinjiro Torii in 1899 to counter imported wines and spirits with homegrown products. It has a long history of pleasing local tastes, opening its Yamazaki distillery in 1923 and launching its signature Suntory *kakubin* (square bottle) in 1937. But even the Japanese market has waxed and waned as office workers turned to beer and *shochu*, a spirit distilled from rice and barley. Today’s global demand for Japanese whisky was unimaginable 20 years ago.

“We would get these old Japanese bottlings in 1999 that we couldn’t sell,” said David Wainwright, a Hong Kong-based whisky merchant who was then head of spirits at Christie’s auction house in London. “I remember trying to sell a case with a couple of Karuizawas, a Mars 25-year-old and some other bottles, and no one would buy it. The seller came in to pick it up and said, ‘Well, I’d better drink them, then.’”

That was an expensive binge—a bottle of Karuizawa 52-year-old Zodiac Rat sold in London for $435,273 on March 18, and some of Suntory’s single malts are similarly expensive. A bottle of 50-year-old Yamazaki fetched $343,000 at auction in Hong Kong in 2018.

International demand for Japanese whisky started to expand in the early 2000s, as Japanese whiskies won international prizes for the first time—culminating in Yamazaki Single Malt Sherry Cask 2013 being named as best whiskey in Jim Murray’s *Whisky Bible* in 2015. This coincided with a wider thirst for historical craft brands, rather than mass-produced liquors, particularly among Millennials.

The craft boom played to Japan’s strengths, with single malts from distilleries that sounded exotic and authentic. “People tend to think that anything from Japan will be high-quality, because it has a reputation for making things really well and people taking pride in work,” Wainwright said. “Japan is fashionable, culturally, and people look to it and observe it, especially in Hong Kong, Taiwan, and China.”

As demand rose, supply of aged single malts remained flat—it is impossible to create more barrels of 25-year-old whisky. To make matters harder, Suntory had cut production in the slump of 30 years ago and sold off some barrels cheaply.

They halted sales of Hibiki 17 in 2018 as supplies ran down. Prices have spiked, with excitement highest at Hong Kong auctions drawing wealthy Chinese and Asian buyers. “The last year has been outrageous, really. It defies economic convention,” said Fowle of Sotheby’s.

The Japanese whisky revival helped to balance a decline in Suntory’s sales of soft drinks and foods in Japan last year, with overall overseas sales (excluding excise taxes) rising to 42 percent of its total. Its strength in spirits was cemented in 2014 by its $16 billion acquisition of Jim Beam, the US bourbon distiller, which it is using as a platform for global growth.

Although soft drinks and food contribute most of its revenues, with sales of ¥1.29 trillion ($11.97 billion), excluding excise taxes, in 2019 against ¥773 billion for alcoholic drinks, its ¥136 billion profits from soft drinks and food were surpassed by ¥144 billion from alcohol. The pandemic could accentuate this—Goldman Sachs estimates that operating profits from its beverages and food division will fall by 10 percent this year.

The thirst for Japanese single malts tracks a broader trend toward premiumization, with US distillers’ sales of “super-premium” Scotch whiskies growing from 10.4 percent of total revenues in 2009 to 32 percent in 2019, according to the Distilled Spirits Council of the United States. While spirits sales volumes have been flat in many countries, drinkers have been willing to pay more for premium drinks. Suntory’s spirits revenues in Japan rose by seven percent last year.

The top malts will remain in demand. But the question for...
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Suntory and other distillers is what happens to the premium market in the pandemic era, when drinkers are less likely to be introduced to new drinks in bars. “If you go into a bar and order an unfamiliar whisky, you are only $10 out. But if you buy the wrong bottle, that is expensive,” said Paul McInerney, senior partner of consultancy McKinsey & Company in Tokyo. The result could be drinkers experimenting less and distillers’ margins falling.

Drinks companies such as Diageo and Pernod Ricard make about a third of their sales by volume through on-premise outlets such as bars, but more than half of sales by value, according to Morgan Stanley. Prices are higher in bars, and bartenders also prompt customers to try out new spirits. “It is a prerequisite for launching a brand,” said Niinami of Suntory’s on-premise sales. “[Bar owners] want to promote new drinks, so it is very important for us and imperative to make this up. It is not a big portion, but it means a lot.”

Suntory has experience responding to sharp falls in sales. In 2008, during a whisky slump, it launched a campaign for the whisky-and-soda highball using its well-known Kakubin spirit. The campaign, starring Japanese actress Koyuki, was vital in reviving whisky drinking in restaurants, and then as ready-to-drink highballs at convenience stores. Niinami thinks that Suntory must again reinvent drinking customs to recover from the pandemic.

Digital means a lot, to introduce how to make fantastic cocktails to local bars that can’t hire top-notch bartenders.

This time, he thinks it can popularize the drinking of cocktails in smaller Japanese cities, and at home, by hiring Tokyo bartenders to give online lessons. “Digital means a lot, to introduce how to make fantastic cocktails to local bars that can’t hire top-notch bartenders. We have strong contacts with great bartenders, and they can be like teachers. There is less business now and we need to support bars. This will be a great chance for cocktail making.”

The need to promote premium spirits is particularly acute in Japan, where regulations are laxer than for Scotch or US bourbon—some cheaper whiskies can be distilled from molasses rather than barley, and may be aged for only two or three years. “You can import Scotch or Canadian whisky, mature it in a barrel for a while, and call it Japanese,” said Liam McNulty, a Tokyo-based whisky expert who writes the Nomunication blog. “The cheap stuff drives a high percentage of convenience store sales.”

McInerney argues that Japan’s distillers can learn from brewers—including their brewing divisions—which persuaded customers to drink premium beer at home as well as in bars in the mid-2000s. “People will spend more time at home and will want interesting drinks for home occasions,” he said. “Distillers could sell party packs in smaller sizes and collaborate more with online retailers and supermarkets. There is an opportunity to propose how [spirits] can be fun.”

But making spirits fun at home is only part of Suntory’s challenge. The company also needs to address its overreliance on Japan and the U.S.

BOLD AMBITION

Niinami got a shock when he first tasted Oaksmith, a blend of Scotch whisky and premium US bourbon aged for four years in white oak barrels launched by Suntory in India in December. “The first time I tasted it, I thought ‘My goodness, it is not good.’ But they told me, ‘The Indian way is to drink it with water.’ When you drink it neat, you do not have a good aroma, but when you put in water, it is beautiful.”

Suntory’s launch of Oaksmith, along with its new blended whiskies Legent in the United States and Ao in Japan, is vital to its future growth. Branding and promoting blended whiskies is a way to get around the shortage of aged single malts and to combine the expertise of Suntory blenders in Japan and at

Japanese whisky has gained a strong following in the United States.
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Beam’s distillery in Kentucky—what it calls the “East-Meets-West competitive advantage.” It is also a recognition that Suntory must make more inroads in emerging markets, such as China and India.

Niinami is optimistic about India, arguing that the country’s young technology engineers and scientists are a natural market for Japanese whisky, rather than the Scottish brands that play to the country’s imperial past—despite the fact that Suntory picked a Scotch-like name for Oaksmith. “The younger generations understand quality, they travel globally, and they have fantastic palates. They make money, they are ambitious, and they like something new. There are so many potential customers there.”

Oaksmith is part of a concerted effort by Niinami to diversify into emerging markets. Diageo, the world’s largest diversified spirits company, is more evenly distributed around the world, with 35 percent of net sales in 2019 in North America, 24 percent in Europe and Turkey, and 20 percent in Asia-Pacific, more than half in India and China. “The reason Suntory bought Beam is we want to globalize, but Beam Suntory did not have a good presence in emerging markets,” Niinami said.

Beam Suntory suffered management tensions following the acquisition, including a tussle over Niinami’s push to move its head office from Deerfield, Illinois, to Chicago. He finally declared the post-merger integration complete in March 2019 but now regrets that Beam Suntory did not move faster into China. “I think it is doing very well now. Perhaps we could have done more in China with [Courvoisier] cognac. That is the concern that stays in my mind still. We do not have a footprint in China and the economy is coming back.”

China is a hard market to crack, with celebrations and business drinking dominated by baijiu spirit distilled from sorghum, such as Kweichow Moutai, but Pernod Ricard has made progress with its Martell cognac among younger drinkers in first tier cities such as Shanghai. “China is the biggest emerging market but was not really a target for whisky until recently. The French were early with cognac, and the Chinese have really got into it now,” said Fowle of Sotheby’s. Although cognac was among the luxury gift items affected by an anti-corruption crackdown in 2014, China remains a significant market for the spirit.

That is a broader lesson for Suntory: whisky and bourbon cannot lead in every market. One recent success is Roku, a Japanese craft gin it launched internationally in 2017 at the urging of Beam executives. “It was a big request because they love Japanese flair, and gin is popular in markets like the UK and Spain. I had big doubts because we do not drink much gin in Japan, so I could not tell if it was good or not. I listened to them and it went very well in Spain, and we took it to the States.”

Niinami still has faith in the potential of whisky in emerging markets, particularly across Southeast Asia. He believes Suntory can draw from its experience in Japan by expanding its highball and ready-to-drink brands in markets such as Taiwan and South Korea. Highballs could have an additional appeal as a lower-sugar alternative to beer and wine. “Health-consciousness was already there and will get promoted by the virus. You want to be healthy because you do not know whether you get infected.”

His strategy fits Suntory’s spirit of yatte minahare (bold ambition). “We pursue the thrill of invention and relish in the now, because we know the future belongs to those who are fresh, free, and unhindered,” Beam Suntory’s website declares. But Suntory is not entirely uninhibited about pursuing expansion. Chairman Nobutada Saji and Chief Operating Officer Nobuhiro Torii are both members of the founding family, and family ownership imparts a longer-term perspective than at some listed companies.

Even Niinami, with his professional managerial style, sounds mystical when he talks about it. “The important thing is to be long-lived, surviving forever. We are standing on the founding spirits. We make big mistakes sometimes, but we learn from them how to conduct business. Unless we can serve society, we are not allowed to use natural water. It should be passed onto the next generation; it is very precious. I would not say it is a religion, but it is a mindset . . . of the family.”

That belief in cultivating Suntory over decades, rather than years or quarters, comes in useful in a time of sudden disruption. The company needs new ways to promote its most profitable brands and to establish itself in fresh markets, but preserving the essence of Japanese whisky is equally vital. “We have to be modest and stay with society. That is the Japanese sense,” Niinami said. “I know Japan pursues too high-quality sometimes, but we have to enjoy the long journey.”

John Gapper is a columnist at the Financial Times and served as editor-at-large of Nikkei Asian Review from January to July 2020.

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As cases of Covid-19 spread in the Kasumigaseki district, Yasutoshi Nishimura, the official tasked with directing the government’s coronavirus countermeasures, was among the first to propose a move to online press conferences at the Keizai Kenkyu Kai press club. Concerns have been raised about what would happen if high-ranking members of the government contract the virus.

At the Cabinet Office, even a member of Nishimura’s Coronavirus Task Force was infected, and Nishimura himself was required to stay in his residence on April 25 and 26. Aware of what occurred with UK Prime Minister Boris Johnson, who was hospitalized with Covid-19 on April 5 and did not return to work until April 27, officials in Japan have become concerned about a possible shutdown of national government functions.

“To avoid close proximity at the minister’s press conference, and from the perspective of reducing the risk to journalists, we would like to begin teleconferencing on April 23,” the Cabinet Office told the Keizai Kenkyu Kai on April 20.

Most news companies took the notification negatively but were resigned to go along with the change. Some voiced concern, however, that the questions posed to Nishimura during teleconferences are more likely to be one-sided. The planned introduction on April 23 was delayed so that members of the media could conduct a trial and deal with matters of concern. Journalists have also said that a shift to online press conferences by other ministries might prevent them from making contact with political leaders and have proposed a new means of conducting interviews. To avoid the spread of infection, more corporate members of the press club have been working from home and videoconferencing that permits interviews from journalists’ homes may be adopted.

If the moves planned by Nishimura are implemented by the government, it might become more difficult to conduct one-on-one interviews with officials. When crises or other incidents take place, reporters asking questions at press conferences need to observe not only the respondents’ voices, but also their mannerisms and facial expressions. For that reason alone, they are likely to resist the expansion of online press conferences.

With the likelihood that the coronavirus crisis will be prolonged—perhaps lasting years—the search continues for a practical means by which reporters can freely engage in their professions while avoiding risk of infection.

When TV entertainer Hideo Higashikokubaru served as governor of Miyazaki Prefecture, he became the self-proclaimed salesman for the region, working tirelessly to promote the prefecture’s products, such as mangos and free-range chickens, to stimulate the local economy.

With the coronavirus pandemic wreaking havoc on regional economies, the emphasis has shifted to dairy products and flowers. The salesman this time is Taku Eto, Minister of Agriculture, Forestry and Fisheries, who also happens to be a Miyazaki native.

The nation’s major consumers of dairy—school lunch programs, cafes, and restaurants—have drastically cut orders for milk, cream, and other products. Milk consumption has fallen 20–30 percent, and fresh cream is down by half. At a press conference, Eto said: “I’d like to ask everyone to buy just one more container of milk or yogurt than they normally do. This will help dairy farmers maintain production.”

With the cancelation of school graduation ceremonies, parties, and events such as weddings, demand for flowers has also fallen sharply. Eto appealed for people to buy more. “For your wife, or for your grandchildren to present to their grandparents. Even one extra bouquet is fine, so please cooperate buy purchasing some.”

Another means of spurring consumption, redeemable product vouchers—the Japanese equivalent of food stamps, valid for purchases of designated products such as meat or fish—was harshly criticized online.

Nevertheless, for raising demand, this method has been determined to be more effective than cash handouts, so Eto and the government are said to be considering the introduction of the vouchers as a last-ditch strategy.
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WORK FROM HOME: REVISITING COMMUTATION ALLOWANCE

In 2015, Japan’s Ministry of Health, Labour and Welfare released Ratio of Enterprises by Industry, Size of Enterprise and the Type of Allowance Paid, the most recent survey of its kind. The results showed that, at the time, a commutation allowance was paid by 90.7 percent of companies with 30–99 employees, as well as 94 percent of those in the 100–999 and 1,000-plus categories. This allowance is an all-too-common payroll item in Japan that has gone unquestioned for years. But Covid-19, and the resulting state of emergency and stay-at-home mandates, have caused a paradigm shift in the way employees work. With so many now working from home, businesses are beginning to rethink the commutation allowance, asking questions such as:

- Should we continue paying it to employees working from home?
- Can we prorate it based on number of days worked at the office?
- How do we pay it to employees working at nearby shared offices?

TRADITION
Employees in Japan’s metropolitan areas often do not have the liberty of deciding where to live; they must choose a location from which it is reasonable to commute. Like it or not, distances—and therefore the time required—are on the rise as the cost of living continues to increase and pushes people farther outside the city.

Under such conditions, commutation has not been viewed as a disposable household expense, and employers have traditionally reimbursed employees. In 1966, the commutation allowance was designated non-taxable in the Income Tax Code and Income Tax Circular.

Today, Article 9-5 of the Income Tax Code says that “income taxes are not imposed on . . . commuting allowance received in addition to ordinary earnings to cover expenses for use of transportation by employment income earners who commute to work (“commuters”) . . . within an amount recognized as being generally necessary by general commuters.”

Under the new normal, where employees work from home a few days a week, are such employees considered “general commuters”? Maybe. Over time, society will reshape the concept and redefine what constitutes a general commuter. Until then, we may look to Income Tax Circular Article 9-5, which provides for non-taxable travel expenses to be paid to non-executive directors, advisors, consultants, and other participants.

NEEDED OR NOT?
While the decision may differ from employer to employer, commutation allowance need not be paid to employees working from home, as they do not incur this expense. If an employee works at the office two days a week, monthly commutation allowance may be prorated. The formula for proration is usually stated in an employee handbook.

However, roundtrip train fare multiplied by the number of days worked at the office may be more expensive than if the employee had a monthly train pass, which offers a discounted per-trip rate.

If an employee works at a nearby shared or satellite office, they may be allowed to claim reimbursement instead of being paid a prorated commutation allowance. Perhaps, under the new normal of working from home a few days a week, commutation allowance may lose its place as a common part of payroll.

ON THE PLUS SIDE
There may be a few benefits. Social security contributions for both employer and employee may be reduced. And having a percentage of employees working from home means less office space is required, creating opportunities to cut rent.

However, as remote work becomes the new normal, employers may be required to invest in information communication technology, cybersecurity, computer equipment among others to support this new way of working.

Tosh Kamii is a partner at Grant Thornton Japan’s Human Capital Services providing business process solutions for payroll and social security alongside advising foreign businesses in Japan on various human capital issues. He is also a practice leader for Global Mobility Services, providing income tax compliance and advisory services to international assignees and global businesses.

For more information, please contact your Grant Thornton representative by email at: tax-info@jp.gt.com

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