



The American Chamber of Commerce in Japan and McKinsey and Company Japan Identify 11 “Big Moves” to Drive Productivity and Growth in Japan Through Digital Transformation

- Japan Digital Agenda 2030 outlines 11 “Big Moves” across four themes: Digital Talent, Industry Transformation, Digital Government and Infrastructure, and Economic Renewal.
- Japan Digital Agenda 2030 launches the ACCJ’s Chamber-wide 2030 Digital Road Map for Japan, a flagship Advocacy initiative to unlock digital innovation in key economic sectors.

February 25, 2021 [Tokyo] – The American Chamber of Commerce in The American Chamber of Commerce in Japan (ACCJ) and McKinsey and Company Japan today released “Japan Digital Agenda 2030,” a collaborative research effort that provides a ten-year road map for the digital transformation of Japan’s economy and society.

Although Japan remains the world’s third largest economy, multiple digital metrics lag those of other advanced economies. Japan has significant opportunity to capitalize on its endowments and build a world class bench of digital talent to build and scale software applications across its economy and society in areas such as manufacturing, healthcare, finance, retail, and the delivery of government services.

“Japan’s digital transformation is of critical importance to the Japanese government, economy, and society, as well as the U.S.-Japan digital dialogue,” said ACCJ President Jenifer Rogers. “The ACCJ is pleased to partner with McKinsey and Company Japan on this research, which is also the result of extensive collaboration with ACCJ sponsor companies and our broader membership who are significant contributors to the success of Japan’s digital future. Implementing these proposals will improve productivity, provide a higher standard of living, and secure Japan as a leader in the global economy.”

11 “Big Moves:”

Big move 1: Develop a deep bench of world-class talent literate in cloud tools, software development, artificial intelligence and other digital technologies and ways of working



Big move 2: Drive broad-scale upskilling across the workforce by shifting from traditional to adaptive learning to build digitally relevant skillsets

Big move 3: Drive end-to-end digitization of education sector from pre-school to tertiary education with solutions for school and educator efficiency, as well as student access

Big move 4: Industrial manufacturing to build on hardware, robotics, and automotive endowments by leapfrogging with software, machine learning and deep learning

Big move 5: Retail to capitalize on shifting customer trends by delivering digital omnichannel experiences

Big move 6: Healthcare to lead globally on next-generation personalized, remote solutions targeting elderly care

Big move 7: Financial services providers to build mobile and broad accessibility solutions by leveraging cloud infrastructure and open network

Big move 8: Government to define a vision and bold goals to provide digital citizen and business services

Big move 9: Government and industry collaborate to scale smart cities, building on Japan's public infrastructure endowment

Big move 10: Startup ecosystem to develop a concept-to-exit formula that produces globally scalable ventures

Big move 11: Systems integrators and technology providers to help their clients accelerate transformation, by building talent in the core and leveraging global best practices

This research partnership between the ACCJ and McKinsey and Company Japan brings together the perspective and experience of a wide range of leading Japanese and U.S. companies which are driving digitalization in Japan and globally. The research and analysis elucidate the "Big Moves" that Japan can pursue over the next decade, highlighting steps needed to address Japan's digital talent deficit, accelerate the uptake of new digital technologies, drive new digital business models in key economic sectors, nurture a vibrant startup ecosystem, and better leverage the capabilities of existing system integrators to unlock new economic value.

Japan Digital Agenda 2030 is a cornerstone of the ACCJ's digital advocacy efforts, and launches a platform for a series of ACCJ policy papers to drive changes in government regulations and corporate practices that are essential to achieving the full benefits of digitally driven innovation.



The judgements in Japan Digital Agenda 2030 are informed by quantitative and qualitative surveys of U.S. and Japanese business and policy leaders to benchmark progress over the past decade. They also include in-depth interviews with over 100 government, business, and technology leaders in and out of Japan and review of over 200 data sources across a range of industries and technologies.

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About the ACCJ

The American Chamber of Commerce in Japan (ACCJ) was established in 1948 by representatives of 40 American companies. Over its 72-year history, the ACCJ has positioned itself as one of the most influential business organizations in Japan. The ACCJ has approximately 3,000 members who together represent over 600 globally minded companies with offices in Tokyo, Nagoya, and Osaka. Working closely with the U.S. and Japanese governments, business organizations and others, the ACCJ engages in activities that advance its mission of further developing commerce between the U.S. and Japan, promoting the interests of U.S. companies and members, and improving the international business environment in Japan including the commitment to demonstrating responsible corporate citizenship. The ACCJ's more than 60 committees represent a variety of industries and make policy recommendations through advocacy tools such as viewpoints, public comments, and white papers. The ACCJ holds on average 500 events and seminars a year, many of which focus on government policy and economic trends. The ACCJ is also committed to promoting charitable and CSR activities. www.accj.or.jp

PRESS CONTACT: ACCJ External Affairs (external@accj.or.jp)

About McKinsey and Company Japan

McKinsey and Company Japan has been serving Japan's leading organizations for 50 years. We help both Japanese and multinational companies identify breakthrough strategies and transform their businesses through operational excellence, technology, and organization. We partner with the business community and local society to build capabilities so that Japan and its people can meet their most pressing economic goals in a sustainable way. McKinsey supports 80% of the top 30 Japanese companies and have completed 1,000 projects in the last five years.

McKinsey Digital and Analytics helps clients identify and capitalize on digital opportunities including design research, digital business building, analytics and machine learning transformations, and broad based digital transformation of operations. It has a broad range of deep technical professionals in Japan, and was recently ranked as a Leader, the highest category, in Forrester's Digital Business Transformation Services report.