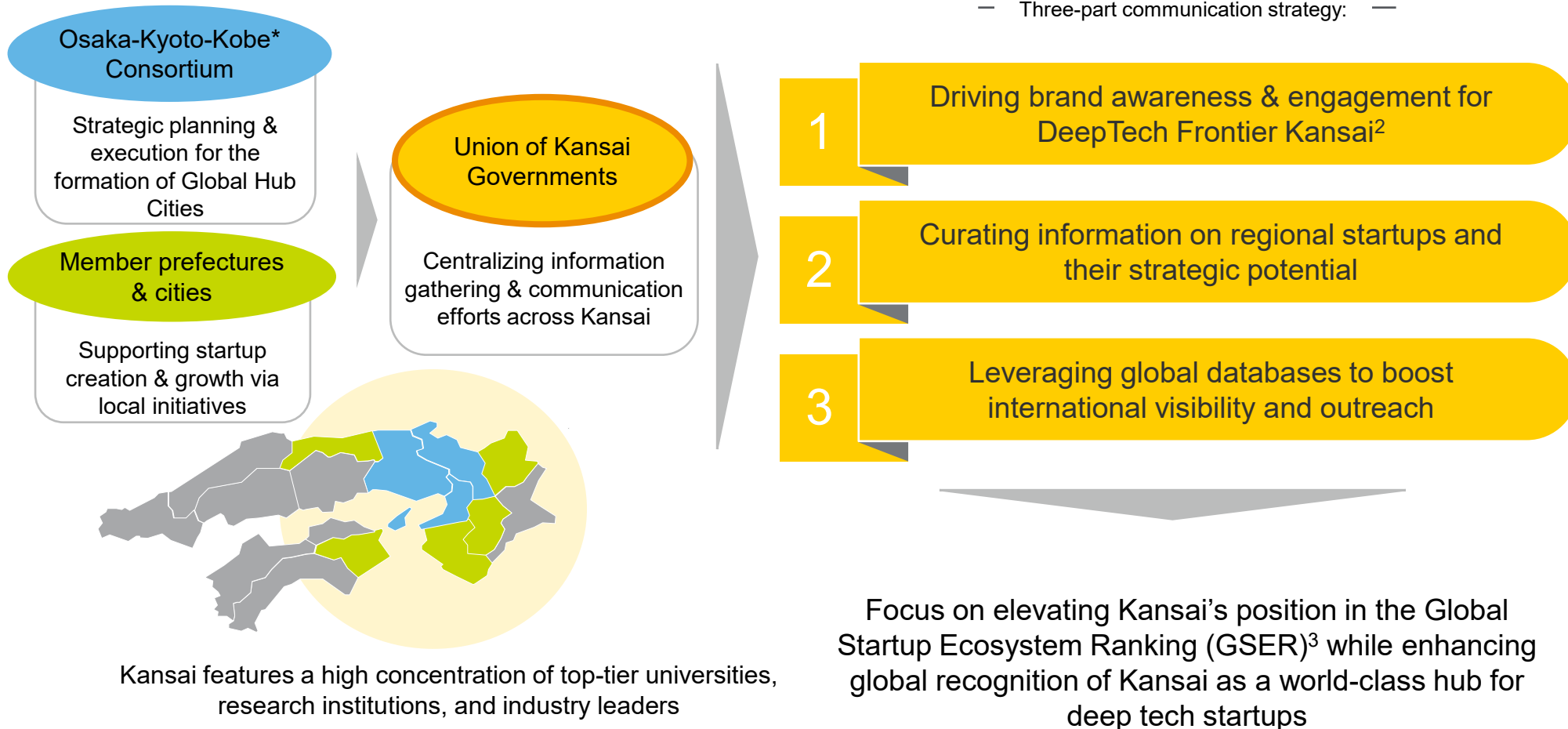


Union of Kansai Governments
Kansai Startup Ecosystem Communications Project
Communications Strategy (2025–2029)



Communication strategy overview

Leveraging the selection process for the Second Phase Startup Ecosystem Hub Cities, we will promote Kansai's high potential for creating deep tech startups¹ and enhance the region's global presence.



*All designated as Second Phase Startup Ecosystem Hub Cities

Communication strategy review for 2021–2024

Kansai’s ranking remains disproportionately low compared to cities of similar economic scale, suggesting that regional achievements and track records lack sufficient international visibility due to a shortfall in strategic communication.

— Previous communication strategy —

Startup ecosystem rankings:
Kansai vs. other locations

Primary activities

- Listing on global & local startup databases
- Promotional activities through the Kansai Startup Ecosystem portal & domestic startup events

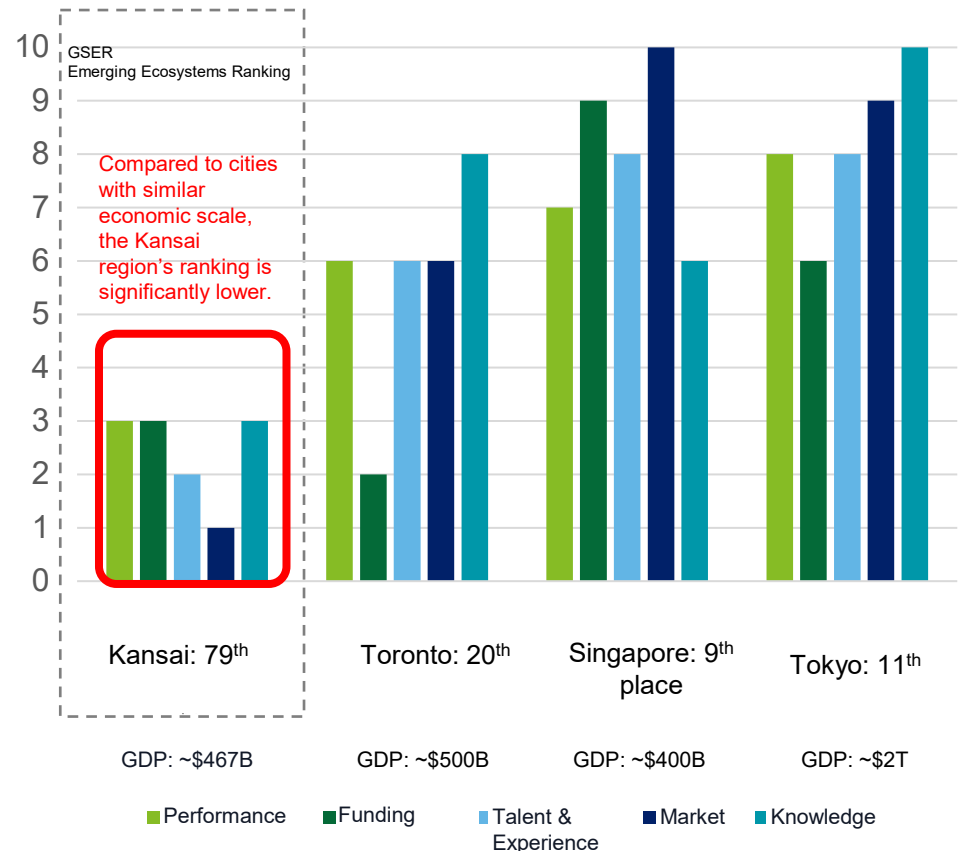
Main results

■ Enhanced ecosystem value	■ Improved GSER Emerging Ecosystems ranking
2023: \$2.68B	2023: 99 th
2024: \$3.22B	2024: 84 th
2025: \$3.23B	2025: 79 th

Key issues

- Kansai’s GSER ranking remains notably low relative to cities of a comparable economic size (see right), indicating that its initiatives and results are not widely known globally and its capabilities may be undervalued

As compared with Tokyo and other similar scale cities in the GESR top 30:



Communication strategy review for 2021–2024

Analyzing the GSER evaluation metrics used as KGIs for the former communication strategy reveals that the region is primarily assessed on performance, funding, talent & experience, market, knowledge, and AI.

GSER metrics & expected primary evaluation criteria

Performance	<ul style="list-style-type: none"> ■ Number of exits⁵ over \$50M and \$1B; exit growth rate ■ Total exit valuation and total startup valuation ■ Number of successful startups within the ecosystem ■ Number of early-stage and late-stage⁶ active unicorns⁷ 	Market	<ul style="list-style-type: none"> ■ Number of startups valued at \$1B and ratio to GDP ■ Ratio of \$50M+ exits to GDP ■ Ratio of \$50M+ exits to Series A⁹ funding volume ■ Logarithmic value of national GDP ■ Average duration to commercialize IP assets ■ Percentage and no. of entities with overseas offices ■ Number of international investors in Series A rounds
Funding	<ul style="list-style-type: none"> ■ Early-stage investment volume and growth ■ Number of local investors ■ Investor track record (avg. investing years and exit ratio) ■ Activity level (investor ratio and no. of new investors) 	Knowledge	<ul style="list-style-type: none"> ■ Number of patents generated within the ecosystem and potential value of the technologies
Talent & experience	<ul style="list-style-type: none"> ■ Tech talent <ul style="list-style-type: none"> - Prevalence of top-tier developers on GitHub⁸, English proficiency, and exit track record - Cost efficiency based on average software engineer salaries ■ Life sciences talent <ul style="list-style-type: none"> - Student and graduate counts in STEM disciplines - Number of life science-specific universities and degree programs - Quality of life science education and research at local universities ■ Scale up and startup experience 	AI (Added in 2025)	<ul style="list-style-type: none"> ■ Proportion of AI & big data startups relative to all technology startups ■ Proportion of AI-native startups relative to all technology startups ■ Share of AI-native venture capital funding relative to total funding across all technology sectors

Communication strategy review for 2021–2024

Analysis based on GSER metrics identifies two primary strategic pathways for the Kansai ecosystem: increasing the activity levels and track record of the global hub cities, and enhancing the Union of Kansai Governments' external reach and recognition.

Key characteristics and challenges for Kansai relative to GSER evaluation metrics

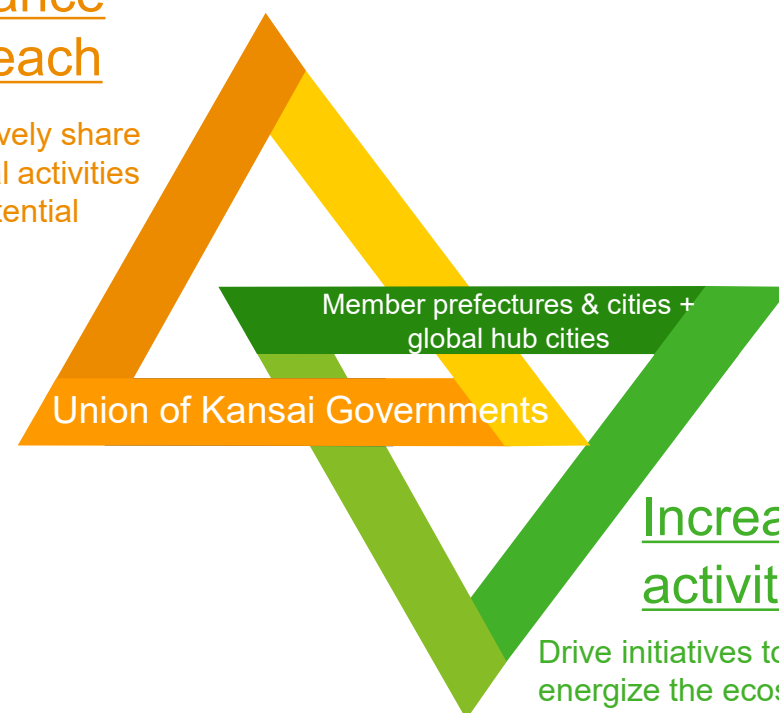
Main challenges

- **Exit volume and scale remain constrained**, preventing the ecosystem's growth cycle from gaining sufficient momentum
- Kansai's startup ecosystem impact (\$3.22B) and early-stage funding (\$124M) are markedly lower than those of top-30 ranked cities, **underscoring the region's limited ability to attract capital**
- **Mean and median funding** for deep-tech startups lags behind the Tokyo area and leading global hubs
- Kansai **lacks sufficient lead VCs** to lead investment rounds, and high-profile Tokyo investors rarely gather for events in Osaka
- **Insufficient investor networking**
- Kansai enjoys a wealth of academic talent from its many universities and research centers, but the **low number of startups has resulted in a shortage of personnel with experience in starting or scaling businesses**
- **The ratio of unicorns and large-scale exits to GDP is low, resulting in a limited impact on the regional economy**
- While the region boasts **world-class patents and research findings, these are underutilized within the local startup ecosystem**
- **Limited number of AI & Big Data and AI-native startups; low share of total regional investment directed towards these sectors**

Proposed solutions

Enhance outreach

Proactively share regional activities and potential



Drive initiatives to further energize the ecosystem, such as supporting startup creation and growth

Performance

Funding

Talent & experience

Market

Knowledge

AI
(Added in 2025)

Phase 2 communication strategy

This strategy aims to maintain and improve GSER rankings through three primary approaches:

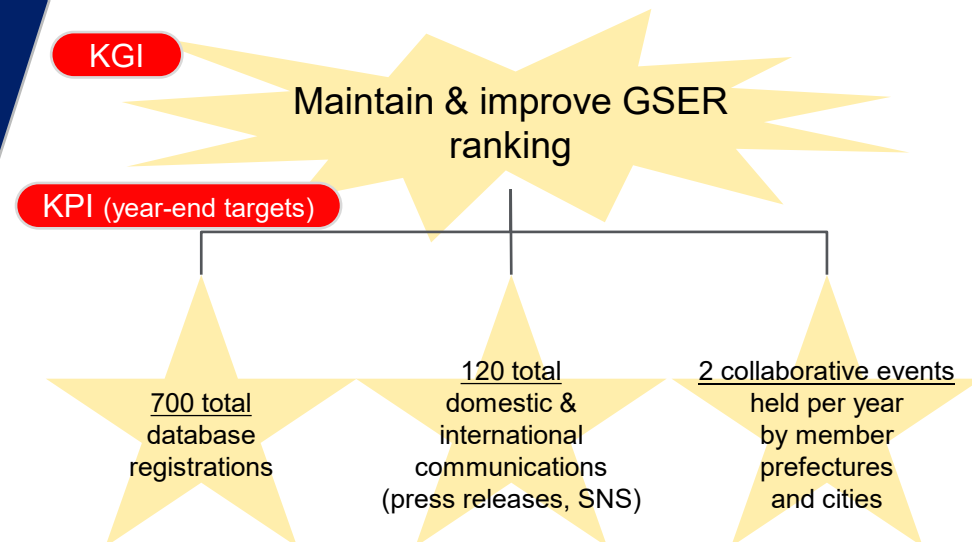
1. Building and promoting the DeepTech Frontier Kansai brand
2. Curating and sharing information about local startups through our portal site
3. Leveraging global databases to boost international visibility and outreach

Where we are now

- With its cluster of academic and research entities and an ecosystem bolstered by industry-university-government cooperation, Kansai shows strong promise for substantial growth moving forward.
- Through the phase 1 communication strategy, the selection of hub cities, and the initiatives of member prefectures and cities, results such as an improvement in the GSER rankings have already begun to emerge.
- However, both the number of startups and unicorns are fewer relative to cities of comparable economic size, resulting in a lower GSER ranking.

Centering on the region's strength in deep tech, we can expect to maintain and elevate Kansai's global ranking by bolstering local initiatives and strategically communicating its potential and achievements to a global audience.

Strategic direction



Driving brand awareness & engagement for DeepTech Frontier Kansai

1	Driving brand awareness & engagement for DeepTech Frontier Kansai
2	Curating information on regional startups and their strategic potential
3	Leveraging global databases to boost international visibility and outreach

By collaborating with the activities of the Union of Kansai Governments' member prefectures and cities and global hub cities, we will strengthen deep tech support and communications within the region under the unified DeepTech Frontier Kansai brand.



**DeepTech Frontier
Kansai**

With a concentration of universities, research institutions, and industrial hubs possessing compelling and highly commercializable research, Kansai has immense potential for growth in the globally recognized deep tech sector.

Strong presence in advanced deep tech fields providing solutions for global issues:

- Bio/life sciences: Regenerative medicine, drug discovery, medical devices, etc.
- Green tech: Nuclear fusion, renewables, carbon capture, etc.
- Digital: AI/Web 3.0, quantum computing, robotics, etc.

Host DeepTech Frontier Kansai events aimed at attracting a wide range of domestic and global resources to the Union of Kansai Governments



Support local initiatives within member prefectures and cities through use of DeepTech Frontier Kansai branding

Enhance outreach for DeepTech Frontier Kansai through utilization of the official website and social media platforms of the Union of Kansai Governments

Curating information on local deep tech startups and their strategic potential

- 1 Driving brand awareness & engagement for DeepTech Frontier-Kansai
- 2 **Curating information on regional startups and their strategic potential**
- 3 Leveraging global databases to boost international visibility and outreach

Organize information on regional strengths and potential for domestic and international outreach, focusing on deep tech in alignment with GSER evaluation criteria.

Current outreach efforts on key websites providing information on the Kansai startup ecosystem										
Communication standpoint	DeepTech Frontier Kansai	Kansai Startup Mashups	KSAC ⁴	KSII	KIDOU	Cities/prefectures	Osaka/Kyoto/Kobe Chambers of Commerce and Industry projects	Osaka Startup Ecosystem	Kyoto Startup Ecosystem	Hyogo-Kobe Startup Ecosystem
Startup/ecosystem branding	High priority core brand	-			High priority core brand	-		Consortium initiatives focused on boosting local startup ecosystem recognition within the region		
Case studies/program overviews	-	Kyoto-Osaka-Kobe support program showcase	University research breakthroughs and GAP funds showcase	Public-industry collaboration	Incubation programs	Part of broader communication activities		Event & program information		
Startup resources/ecosystem	Deep tech startup database	Ecosystem showcase	-	Event information	-	Part of broader communication activities		Startup & ecosystem showcase		

Focus on topic-based outreach for deep tech startups, aligned with Startup Genome's assessment categories



Proposed topics

- Global events & programs
- Success case studies
- Kansai in numbers: fundraising, startup numbers, etc.
- University research potential
- Regional infrastructure
- Support center & program listings
- ...

Specific outreach actions



- Consolidating and sharing data regarding startup valuations and funding achievements
- Gathering efforts from relevant regional organizations to establish deep tech as a core focus brand
- Interviewing and creating content focused on the deep tech capabilities of local municipalities and startups targeting international markets
- Collecting data on IP and talent-related assessment metrics
- ...And more!

Leveraging global databases to boost international visibility and outreach

- 1 Driving brand awareness & engagement for DeepTech Frontier-Kansai
- 2 Curating information on regional startups and their strategic potential
- 3 Leveraging global databases to boost international visibility and outreach

Enhance communication efforts by consistently updating databases, producing startup feature articles in both Japanese and English, and maintaining an active presence across websites, social media, events, and media outlets.



Registration on overseas databases

Drive registrations on international databases like Crunchbase, with specific platforms to be selected on an ongoing basis

Article creation

Produce English content aimed at building international awareness of deep tech capabilities and startup ecosystems within the member cities and prefectures

Press coverage

Secure direct coverage and feature placements in global media

Promotion on websites & social media

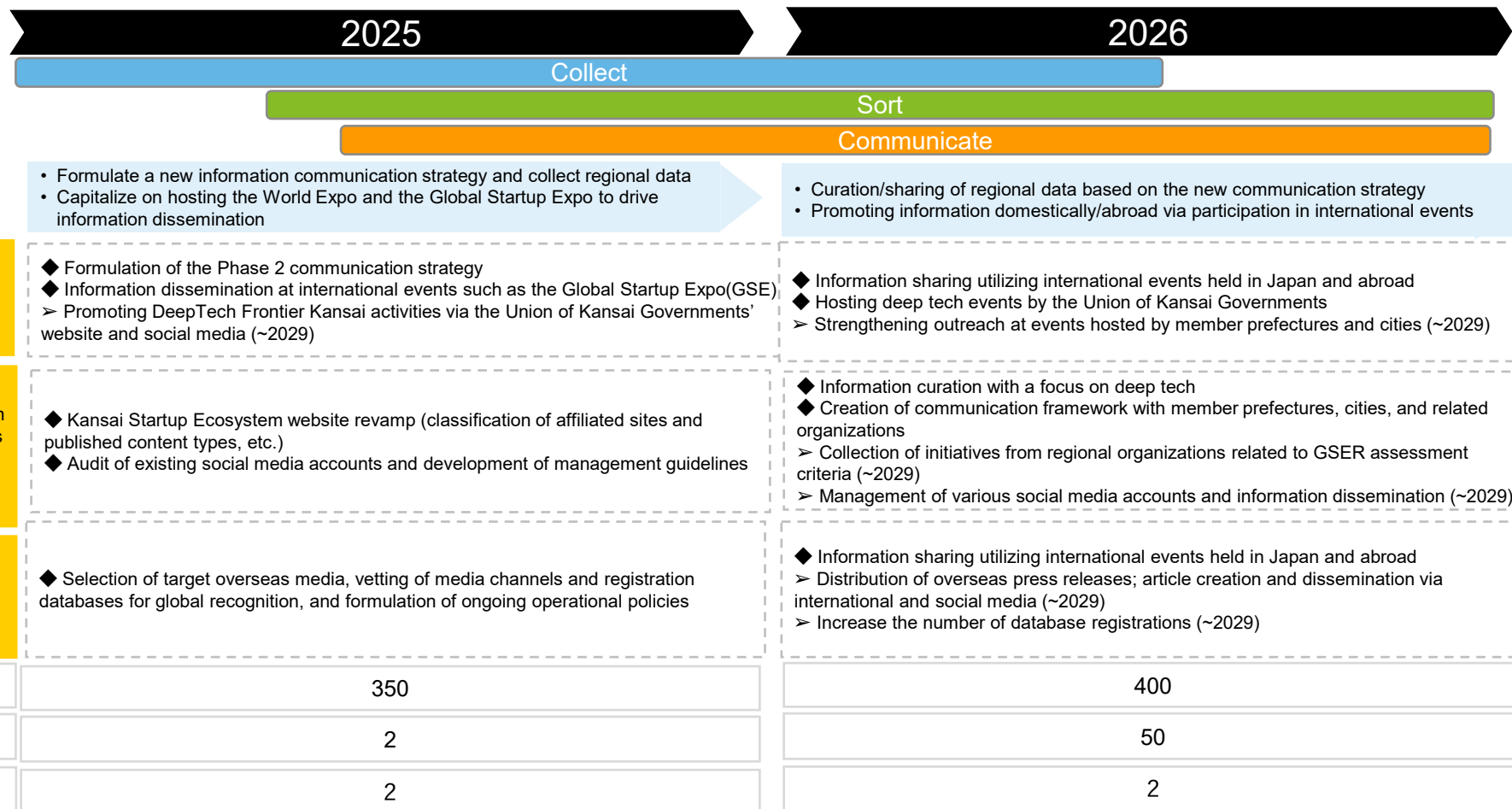
Ongoing dissemination of startup-related information across websites and social media platforms

Promotion at events

Share information and promote visibility through participation in international events

Roadmap to 2029

Strengthen regional partnerships and global visibility through the systematic collection of data from local stakeholders and synchronized information sharing at various international events.



(Planned initiatives may be revised based on ongoing circumstances. Please be aware that descriptions represent projections as of the present date.)

Database registrations: Based on the number of Kansai-based startups listed on Dealroom (<https://kansai.dealroom.co/intro>).

Note: Dealroom includes public companies founded more than 10 years ago, so listings are filtered and reviewed for inclusion.

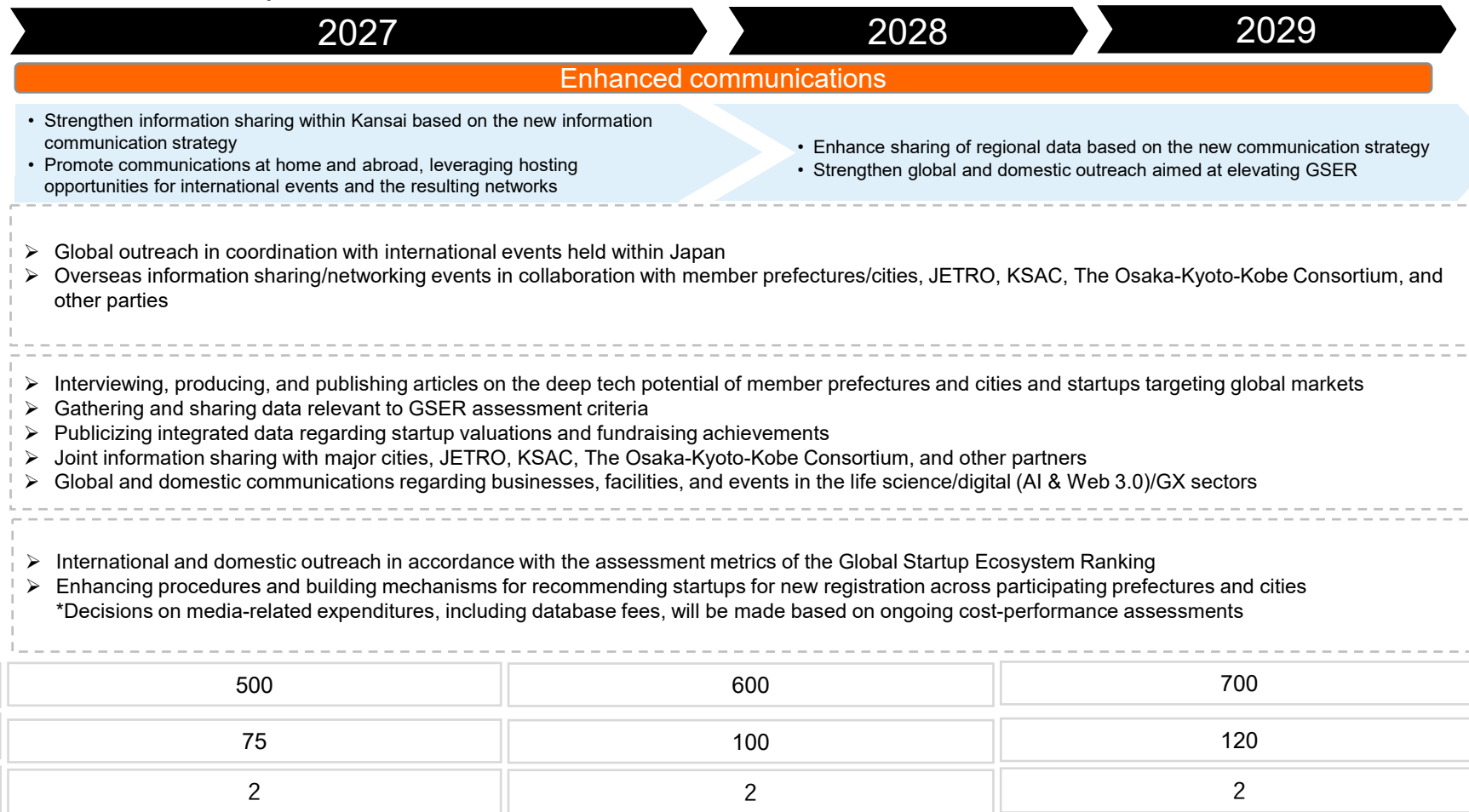
Published posts: Combined total of posts on official Kansai Startup Ecosystem social media (Facebook, LinkedIn, etc.) and press releases issued by the Union of Kansai Governments.

Media coverage: Searches for terms like "Kansai startup" on Google News, PR TIMES, and international startup media. Total appearances in newspapers, trade journals, and web media.

Note: Due to a lack of precise official data, estimates are calculated based on the publicity efforts of key organizations and events.

Roadmap to 2029

Enhance regional synergy and communication impact through the collection and systematization of data from local stakeholders and collaborative promotion at international events.



(Planned initiatives may be revised based on ongoing circumstances. Please be aware that descriptions represent projections as of the present date.)

Database registrations: Based on the number of Kansai-based startups listed on Dealroom (<https://kansai.dealroom.co/intro>).

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Explanation of terms

E	Term	Explanation
1	Deep tech startup	Startups founded on advanced technologies and R&D, including AI, biotechnology, robotics, and quantum computing, which frequently originate from research conducted at universities and research organizations.
2	DeepTech Frontier Kansai	Branding for Kansai-based deep tech startups to enhance their visibility both in Japan and overseas.
3	Global Startup Ecosystem Ranking (GSER)	Global startup ecosystem ranking, based on indicators such as funding, growth potential, and innovation power.
4	KSAC	Kansai Startup Academia Coalition, a collaborative consortium of Kansai-based universities and research institutes dedicated to driving startup creation and enhancing support systems.
5	Exit	The process of startups and investors gaining returns from a business via an initial public offering or merger/acquisition.
6	Early-stage, late-stage	“Early-stage” refers to the initial growth stage of a startup, during which product or service development, market entry, and initial customer acquisition take place. “Late-stage” refers to the stage after growth has accelerated and the business model is established, involving scaling, monetization, and large-scale funding.
7	Unicorn	A fast-growing, unlisted startup founded within the last 10 years with an estimated valuation of \$1 billion or more.
8	GitHub	A code-sharing and management platform for software developers.
9	Series A	A startup's first major round of financing targeted at scaling operations and achieving significant growth.



関西広域連合

UNION OF KANSAI GOVERNMENTS