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JAPAN'S DEFENCE STRATEGY OVERVIEW AND BUSINESS OPPORTUNITIES FOR FINLAND

19 AUGUST, 2026

BUSINESS FINLAND | INVEST IN FINLAND

Perspectives on Future Europe / NATO - Japan Cooperation

Important trends

The core of future cooperation between Japan, Europe, and NATO lies in establishing **Operational & Industrial Interoperability** that extends beyond traditional diplomatic dialogue.

1 Strategic Paradigm Shift

- Japan is deepening its strategy beyond its traditional reliance on the bilateral US-Japan alliance by **leveraging multilateral security networks, specifically through the NATO - IP4** (Japan, South Korea, Australia, New Zealand) framework and EU partnerships.

2 Mutual Complementarity of Defence Industrial Bases (DIB)

- The lack of production capacity on the European side and the export strengthening of defence technologies and manufacturing on the Japanese side will lead to **the joint development of next-generation equipment, sharing of supply chains and the construction of the capacity of ammunition and parts** (Deterrence via Sustainment)

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Key Themes between Europe / NATO - Japan Cooperation

	Top 5 tehemes	Project overview	Potential for Finland
1	Full-scal operation of NATO-IP4 "Flagship Projects"	Priority cooperation frameworks agreed upon between NATO and the IP4 countries. Concrete projects are underway across four primary domains: cyber defense, counter-disinformation (cognitive warfare), space security, and Emerging and Disruptive Technologies (EDTs).	Hybrid threat and cognitive warfare countermeasures, cyber defence, emerging and disruptive technologies (EDT)
2	EU-Japan Security and Defence Partnership	The first formal security framework signed between Japan and the EU, establishing regular strategic dialogues and coordinated actions regarding maritime security, hybrid threats, space, cyber, and defense industry cooperation. A primary focus is joint defense equipment initiatives aligned with the EU's European Defence Industry Programme (EDIP).	European Defence Fund (EDF) projects, dual-use technologies, maritime security
3	Strengthening Defence Supply Chains and Interoperability	In response to rising geopolitical risks, initiatives are underway across Europe, Japan, and the US to de-risk and diversify supply chains away from the Dragon for critical raw materials, semiconductors, and dual-use technologies. Simultaneously, this involves driving standardization between NATO specifications and Japan Self-Defense Forces (JSDF) standards.	Interoperability of land-based armored equipment, ammunition and explosive supply chains, and highly durable tactical communications.
4	High North / Subsea Infrastructure Protection and Wide-Area ISR	Addressing the realities of opening Arctic sea routes and the risk of sabotage against critical maritime infrastructure (undersea cables, pipelines, etc.) through joint development of wide-area sensing and maritime patrol architectures.	Protection of critical underwater infrastructure (cables and pipelines), sensing for operations in extremely cold regions, and wide-area surveillance.
5	Space Domain Awareness (SDA) and Small Satellite Constellations	Advancing the utilization of Synthetic Aperture Radar (SAR) small satellite networks and building real-time intelligence-sharing mechanisms. Enhancing all-weather, day-and-night surveillance capabilities stands as a critical shared objective across both ends of Eurasia.	SAR satellites, all-weather real-time ISR, space domain awareness (SDA).

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Dramatic changes in Japan's defence industry

1 Defence Budget Comparison: FY2025 vs FY2026

Item	FY2025 (Initial Budget)	FY2026 (Proposed Initial Budget)	Growth Rate/Key points
Total Defence Budget	**Approx 8.2 trillion Yen** (€44.12 Billion as of 3June26)	**Approx 9.04 trillion Yen** (€48.64 Billion as of 3June26)	**Approx 9.4% increase** (Reaching an all-time high)
Key Investment Focuses	■ Procurement of stand-off missiles, introduction of UAVs/drones, etc.	■ Improved Type-12 Surface-to-Ship Missiles (approx. 973.3 billion yen), **SHIELD Coastal Defence System** (approx. 100 billion yen), GCAP Next-Generation Fighter Development (approx. 160 billion yen).	■ Shift toward mass production and active deployment phases for counterstrike (stand-off) capabilities; enhancement of AI-linked autonomous systems.

Note: GCAP = Global Combat Air Programme

Defence budget, if it was set at 3.5% of GDP as requested by the US government.

Approx 21 trillion Yen (€112.98 Billion as of 3June26)

2 Revision of the Implementation Guidelines of the Three Principles on Defence Equipment and Technology Transfer (Abolition of the "Five Categories")

The abolition of Japan's legacy "5 categories" restriction enables flexible defence equipment/component supply and joint development with Finland as a like-minded country. This policy shift drastically accelerates technology transfers and joint R&D in dual-use and advanced defence domains—including armored vehicles (e.g., Patria), space technology (e.g., ICEYE), UAVs autonomy, C5ISR networks, and cryogenic/quantum systems (e.g., Bluefors).

Note: Definition of Five Categories: 1) Rescure, 2) Transport, 3) Vigilance, 4) Surveillance, 5) Minesweeping

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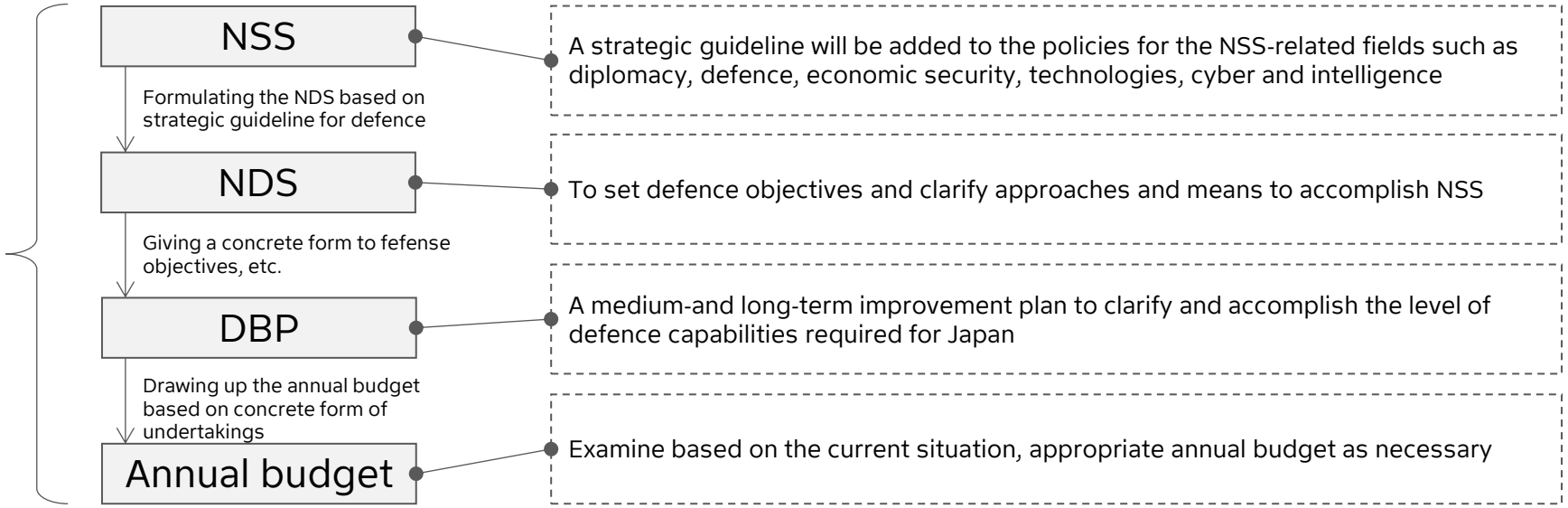
Overview of Japan's defence Strategy

Three strategic documents	points
1 National Security Strategy (NSS)	A top-level guideline that integrates diplomacy, defence, economy, technology, and information. 10-year span.
2 National defence Strategy (NDS)	Defence goals and means of achieving NSS (formerly: National defence Program Guidelines).
3 Defence Buildup Program (DBP)	Specific costs over five years (approximately 43 trillion yen) and equipment quantities.

Relationship among the NSS, the NDS, the DBP



Source: Defence white paper

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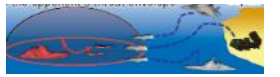
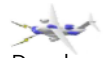
Seven functions and capabilities to be prioritized in the drastic strengthening of defence capabilities

Seven themes	Functions overview	Case exampes
1 Stand-off Defence Capabilities	Strengthening the defence capabilities to oppose invading forces from a safe distance where we will not be attacked	 Stand-off defence system
2 Integrated Air and Missile Defence Capabilities	Strengthening our capabilities to respond to increasingly diverse and complex airborne threats such as missiles	 Shipbuilding of an Aegis System-Equipped Vessel
3 Unmanned Defence Capabilities	Strengthening our capabilities, e.g., via intelligence gathering and combat support with unmanned assets	 Preparation of UAVs for reconnaissance
4 Cross-Domain Operation Capabilities	Strengthening space, cyber, electromagnetic spectrum, land, sea and air capabilities necessary for combat by fusing all capabilities	 Development of Stand-off Electric Warfare Aircraft
5 Commaned and Control and Intelligece-related Functions	Strengthening command and control and intelligence-related functions to accelerate and refine decision-making	 Acquisition of Signals Intelligence Aircraft(RC-2)
6 Mobile Deployment Capabilities / Civil Protection	Strengthening maritime and air transport capabilities to quickly maneuver and deploy the necessary forces. Implementing civil protection by utilizing the above capabilities	 Acquisition of transport vessels
7 Sustainability and Resiliency	Preparation of necessary and sufficient ammunition, guided missiles and fuel from an early stage. Securing expenditures for acquiring equipment parts, equipment repairing and improving the resiliency of facilities	 Securing the ammunition strorage facilities

Source: Defence white paper

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Specific details of the seven functions

Seven themes	Areas related to Finland
1 Stand-off Defence Capabilities	Ability to practically operate standoff missiles Development of submarine-launched guided missiles Development of high-velocity gliding missiles for island defence Building a satellite constellation
2 Integrated Air and Missile Defence Capabilities	Strengthening countermeasure capabilities against hypersonic weapons and UAVs Development of an improved medium-range surface-to-air missile Maintenance of PAC3-MSE missiles Acquisition of mobile air defence and control radar
3 Unmanned Defence Capabilities	Expanding UAVs utilization and strengthening practical operational capabilities Acquisition of improved UAVs Acquisition of airborne and ship-based UAVs Research on UGVs systems
4 Cross-Domain Operation Capabilities	Strengthening space domain awareness, cybersecurity, and electromagnetic capabilities Development of the next generation defence communications satellite Implementing a risk management framework Development of a cyber domain decision support system
5 Commaned and Control and Intelligece-related Functions	Use of AI to accelerate decision-making, respond to cognitive warfare, and gather intelligence information Strengthening command and control functions Strengthening information gathering and analysis functions Responding to information warfare, including the cognitive domain
6 Mobile Deployment Capabilities / Civil Protection	Strengthening the Self-defence Forces' transportation assets Acquisition of small and medium-sized vessels Acquisition of utility helicopters Promoting projects utilizing private transport capacity
7 Sustainability and Resiliency	Strengthening defence facilities in preparation for emergencies Improving the resilience of Self-defence Force facilities Equipment maintenance and repair Acquisition of various ammunition necessary for unit operations

Source: Defence white paper

SHIELD: A budget has been allocated for a new coastal defence system using UAVs (as of March 2026)

FY2026 Budget Request ~Key Points~

◆Unmanned Defense Capabilities The Establishment of SHIELD by Unmanned Assets

(SHIELD : Synchronized, Hybrid, Integrated and Enhanced Littoral Defense)

- With the recent introduction of unmanned assets and progress of technological innovation in various foreign countries, the character of warfare has undergone significant changes. For Japan, it is more urgent than ever to promptly establish an asymmetrical defense architecture utilizing not only manned platforms but also a combination of inexpensive and large-quantity UAVs, USVs and UUVs in order to defend against various forms of invasion including those costly manned platforms.
- It is now possible to rapidly acquire a large number of various unmanned assets, leveraging the latest technologies in addition to insights gained from previous demonstration experiments.
- Accordingly, the MOD will advance these initiatives by allocating approx. ¥128.7 billion in the FY2026 budget request, aiming to establish the SHIELD by unmanned assets in FY2027.
- In parallel with the efforts, the early introduction of simultaneous control system for various unmanned platforms will also be promoted.

Conceptual Image of SHIELD

Acquirement of Unmanned Assets for SHIELD

1. Modular UAV (GSDF)
2. Small Attack UAV I (GSDF)
3. Small Attack UAV II (GSDF)
4. Small Attack UAV III (GSDF)
5. Ship-Launched UAV (MSDF)
6. Ship-Based Small UAV (MSDF)
7. Anti-Ship UAV (ASDF)
8. Radar Site Defense UAV (ASDF)
9. Small Multi-Purpose USV (GSDF/MSDF)
10. Small Multi-Purpose UUV (GSDF)

Projects Related to SHIELD

- Demonstration for the introduction of simultaneous various unmanned platforms control capabilities

6

Source: Progressand Budgetin Fundamental Reinforcement of Defense Capabilities

FY2026 Budget Request ~Expense Classifications~

【Annual Defense-related Expenditures (3 categories)】 【Unit: ¥100 million】

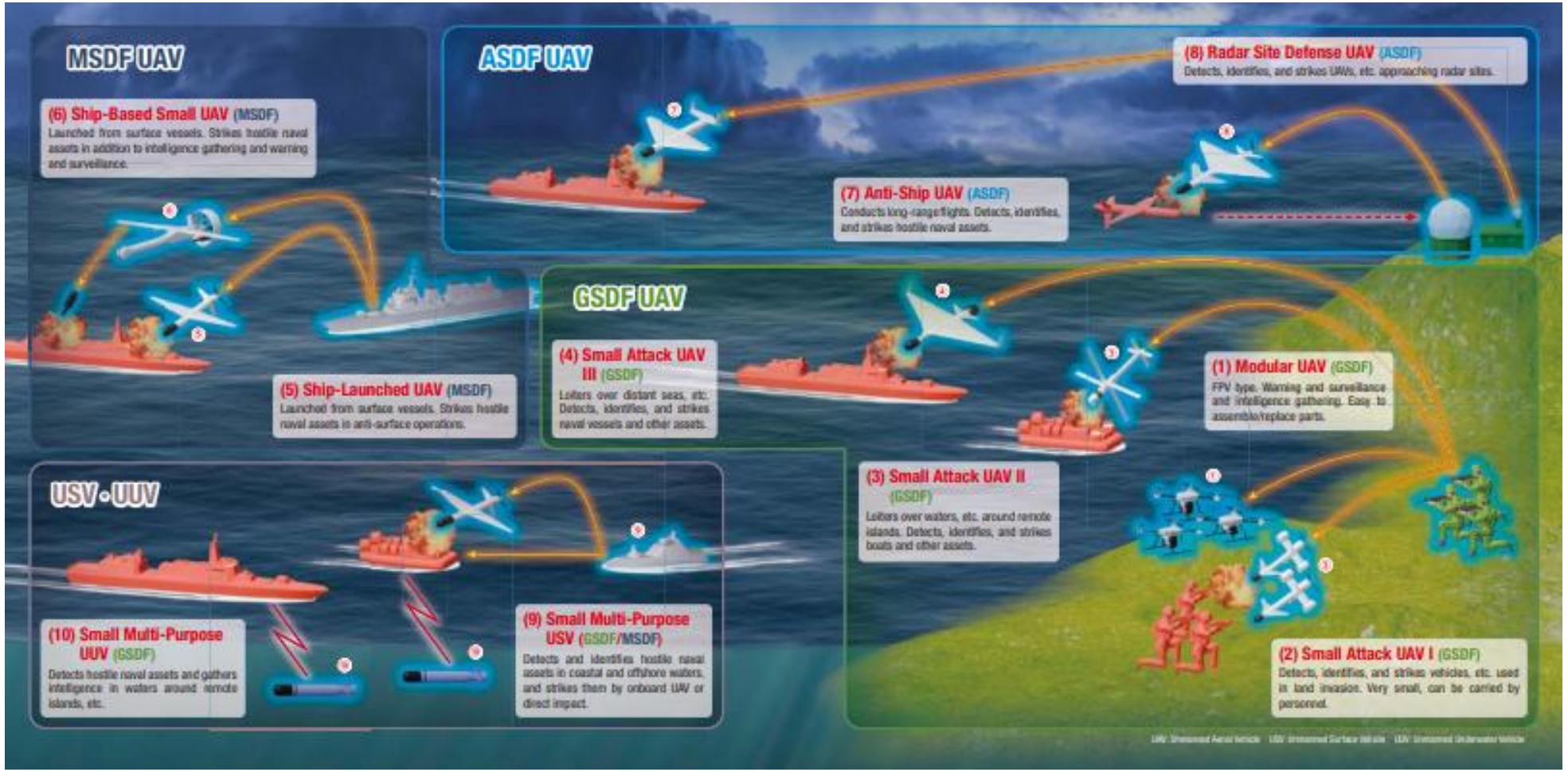
Category	FY2025 Budget	year on year change	FY2026 Request	year on year change
Defense-related Expenditures	84,748 (87,005)	7,498 [9.7] (7,508 [9.4])	88,454 (88,454)	3,706 [4.4] (1,450 [1.7])
Personnel and provisions expenses	23,508	1,218 [5.5]	23,192	△315 [△1.3]
Material expenses	61,240 (63,497)	6,280 [11.4] (6,290 [11.0])	65,262 (65,262)	4,022 [6.6] (1,765 [2.8])
Obligatory outlay expenses	43,119 (44,553)	5,191 [13.7] (5,073 [12.9])	45,390 (45,390)	2,271 [5.3] (837 [1.9])
General material expenses	18,121 (18,944)	1,089 [6.4] (1,217 [6.9])	19,872 (19,872)	1,751 [9.7] (928 [4.9])

Under the National Defense Strategy (NDS) and the DBP, the MOD focuses on the seven key pillars. For instance, the MOD/Self Defense Force (SDF) will promote the establishment of Synchronized, Hybrid, Integrated and Enhanced Littoral Defense (SHIELD) by unmanned assets, and continue to fundamentally reinforce core areas of future defense capabilities, including stand off defense capabilities, integrated air and missile defense capabilities, and cross domain operation capabilities Continuously.

Note: MOD = Ministry of Defence

SHIELD (From the latest Defence White Paper: 4 August)

- As a part of strengthening unmanned defense capabilities, Japan will acquire a large number of low-cost UAVs, USVs, and UUVs with an aim to establish the Synchronized, Hybrid, Integrated and Enhanced Littoral Defense (SHIELD) with unmanned assets within FY2027.



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Great potential: Digital Defence Tech, ability to sustain operations in extreme environments, high level of resilience

Seven functions of defence capabilities

Finland defence related value propositions

	1 Stand-off Defence Capabilities	2 Integrated Air and Missile Defence Capabilities	3 Unmanned Defence Capabilities	4 Cross-Domain Operation Capabilities	5 Commaned and Control and Intelligece-related Functions	6 Mobile Deployment Capabilities / Civil Protection	7 Sustainability and Resiliency
Shelter / Infrastructure (Comprehensive Security)						△	◎
Cyber Security & Electronic Warfare	△	○	○	◎	◎		◎
UAVs & Robotics	○	○	◎	○	○		
Space & Satellite (C5ISR)	○	○	○	◎	◎		○
AMV (Armored Vehicles) / Platforms						◎	○
Extreme-Communication / Digital Bases				○	◎	○	◎

Note: ISR = Intelligence, Surveillance, Reconnaissance

◎: Highly Compatible/Critical, ○: Strong Contribution, △: Complementary Contribution

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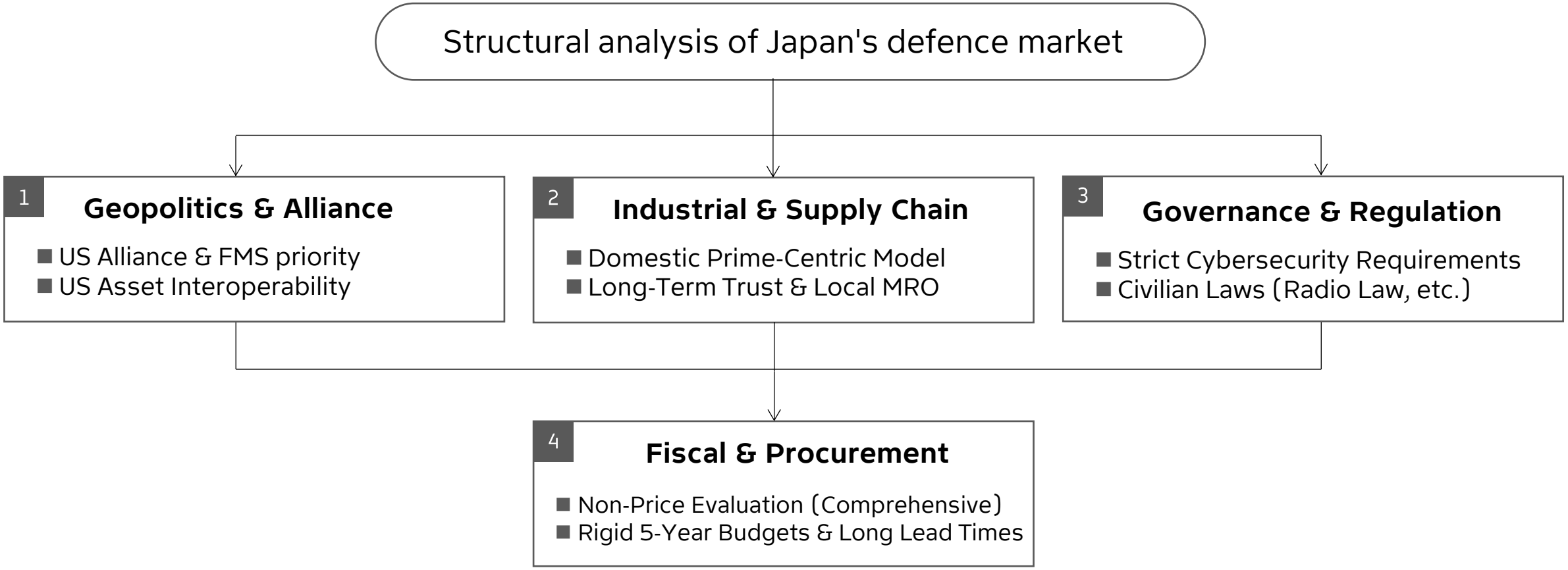
Japanese Defence Market: Four pillars structural framework



Note: FMS (Foreign Military Sales)、Local MRO = Local Maintenance, Repair and Overhaul

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Strategic approaches of Finnish companies to overcome the four pillars (major barriers) to entry

- *CSF: Not to sell products that have been completed in Finland without any modifications!*

	Four pillars	Strategic options	Detailed explanation of strategic options
1	Adaptation to Geopolitical and Alliance Requirements	Complementing the "niche" of US assets, based on the premise of "native compatibility with NATO and US standards."	Do not attempt to compete with massive US platform primes. Instead, position Finnish technology as a **highly specialized plug-in optimization tool.** Leverage Finland's native NATO/MIL-spec compliance to prove that your software, AI algorithms, or sensor assets directly enhance the capabilities of Japan's existing US-made infrastructure without creating interoperability conflicts.
2	Adaptation to Industrial Infrastructure and Procurement Structure	Not simply about exporting products, but "technology transfer" and "joint black-boxing" to Japanese domestic prime contractors.	Adopt a **B2B Industrial Partnership model** rather than trying to sell directly to the Japanese government. Use specialized trading houses (e.g., Marubeni Aero, Kanematsu Aero) to facilitate partnerships with Japanese Tier 1 primes (e.g., MHI, KHI,). Offer **Technology Transfer or Software Licensing.** Let the Japanese prime manufacture the hardware locally and deliver a "Made in Japan" solution to the MOD, which shifts the long-term support and country-risk burden off your shoulders.
3	Adaptation to Governance, Security & Regulatory Compliance	The initial proposal for "sovereign implementation" and deregulation using commercial dual-use (disaster prevention and civilian) as justification.	**Sovereign Cloud Native**: From the beginning, engineer architecture **for Sovereign Cloud Deployment** (e.g., hosting data exclusively within AWS GovCloud Japan) to ease cyber security anxiety. **Dual-Use Route:** Bypass rigid military regulatory bottlenecks by introducing technology (such as arctic-grade autonomous UGV systems or SAR data) into **civilian/dual-use sectors first**—such as disaster relief, meteorology, coast guard, or infrastructure security. Passing Japan's Radio Law in a civilian framework drastically lowers the regulatory wall when transitioning to the MOD.
4	Adaptation to Financial & Procurement Selection Mechanism	Targeting the "missing parts (mission gap)" in the five-year plan and utilizing supplementary budgets.	By analyzing the "Defense Force Development Plan (5-Year Plan)," the company proposes its own technology to fill "mission gaps" (missing parts) in areas where budget allocations have been made but domestic technology is lagging behind (e.g., early deployment of **unmanned assets, AI-based information analysis, cyber counterattack capabilities**).This strategic approach aims to **avoid price competition** and secure a "comprehensive evaluation bid" with a high rating.

Strategic Models for Entering the Japanese Defence Market

	Entry Models	contents	challenges	actions
1	Direct Entry & Agency-Led Supply	■ Leverages **the pure performance of Finnish solutions, technologies and products.** ■ Relies **on the established networks of defence-specialized companies**	■ **The "Language Barrier":** Navigating complex Japanese tender documentation and technical specifications. ■ **Logistics & MRO:** Difficulty in establishing localized maintenance, repair, and overhaul (MRO) capabilities.	■ **Obtain the "Unified Supplier Qualification"** for Japanese government procurement. ■ Secure exclusive or non-exclusive **agency agreements with defence-specialized trading houses.**
2	Strategic Partnership & Licensed Production	■ **High Political Credibility:** Leverages the partner's existing relationship with the MOD and political stakeholders. ■ **Supply Chain Resilience:** Solves the logistics bottleneck by enabling domestic MRO. ■ **Alignment with Japanese National Policy:** Directly aligns with Japan's policy of "Strengthening the Domestic Defense Industrial Base."	■ **Technology Transfer:** Requires a balance between sharing IP and maintaining a competitive edge. ■ **Partner Matching:** Identifying the ideal manufacturer (e.g., MHI, Komatsu, or Daikin) whose production lines align with Finnish technology.	■ Engage in matching events through the Finland **Digital Defence Ecosystem (DDE) / Embassy of Finland, Tokyo (Trade Section)** ■ Conduct feasibility studies for technology transfer and local production line compatibility.
3	Ecosystem Integration & Joint R&D (The "Deep Tech" Model)	■ **Lower Physical Barriers:** Software and dual-use technologies face fewer export hurdles than heavy hardware. ■ **Standardization:** Positioning Finnish tech as the "standard" for Japanese critical infrastructure (Telecom, Power, etc.).	■ **Slow Decision-Making:** Japanese public-private partnerships require long lead times for consensus building. ■ **Funding Structures:** Navigating the specific requirements of Japanese government R&D grants.	■ **Participate in regional synergy platforms** to leverage GX/DX regional partnerships. ■ **Submit joint proposals for the Acquisition, Technology & Logistics Agency (ATLA)** research programs alongside Japanese startups or research institutes.

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Major defence companies in Japan

MITSUBISHI HEAVY INDUSTRIES

Japan's leading defense equipment manufacturer, producing fighter jets, ships, submarines, and combat vehicles.

Dept sales: 1029B Yen

Aviation/Defence/Space

Kawasaki Heavy Industries

The second largest manufacturer in Japan after MHI, producing aircraft, submarines, and missiles.

Dept sales: 567B Yen

Aerospace Systems

IHI **ICEYE**

The core of jet engine development and manufacturing, engine development for the next-generation fighter jet.

Dept sales: 552B Yen

Aviation/Defence/Space

MITSUBISHI ELECTRIC **VTT**

Missiles and radars and develop electronics for next-generation fighter jets.

Dept sales: 353B Yen

Defense/Space system

NEC

Defence command and control systems, submarine detection sonar, communication systems, cloud

Dept sales: 370B Yen

ANS (Space/National Security) Business

FUJITSU

Development and production of command & control systems, information systems, and cloud services for MOD.

Dept sales: 267B Yen

Defense

JSW **Patria**

Development of firearms and railguns, and AMV in collaboration with Patria.

Dept sales: 32B Yen

Defense-related equipment, AMV

SUBARU

Training aircraft and helicopters for the Self-Defense Force

Dept sales: 111B Yen

Defense/Space system

JMU

Construction of destroyers and minesweepers for the Self-Defense Force, and manufacture of related equipment.

Dept sales: 300B Yen

Ship manufacturing

Source: Weekly Toyo Keizai, departmental sales figures are based on actual results for fiscal year 2025.

Ranking of contract amounts with the Ministry of Defense (FY2024)

R	Company	amount
1	MHI	1456
2	KHI	638
3	Mitsubishi Electric	495
4	NEC	311
5	Fujitsu	173
6	JMU	161
7	TISS	156
8	JSW	120
9	ITOCHU Aviation	97
10	Hitachi	79

R	Company	amount
11	OKI	69
12	SUBARU	59
13	IHI	57
14	MHI-MS	54
15	Mitsui Bussan Aerospace	41
16	ENEOS	34
17	Nakagawa Bussan	34
18	Kousoku Marine Transport	30
19	DAIKIN INDUSTRIES	26
20	Komatsu	25

Unit: billion Yen

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Trading houses specializing in defence sector: Strategic Partner Candidates for Finnish companies

MITSUI BUSSAN AEROSPACE

Core Domain & Target Areas

- Space defence (SSA/SAR data), Government/MOD helicopters/UAVs

Strength in the Defence Industry

- Leveraging Mitsui Group's corporate defence & space investment portfolio

Marubeni Aerospace

Core Domain & Target Areas

- Unmanned assets (UAV/UGV), Fixed/Rotary-wing components

Strength in the Defence Industry

- Aggressive investment in UAVs testing, field demos, and UAVs logistics

Sumisho Aero-System Corporation

Core Domain & Target Areas

- New domains (Cyber, Electronic Warfare), Cross-domain platforms

Strength in the Defence Industry

- Integrated separate hardware & software into unified defence networks

Sojitz Aerospace Corporation

Core Domain & Target Areas

- Combat uniforms, ballistic gear, gas masks, platform spares

Strength in the Defence Industry

- Rapid import of mid-tier foreign gear & managing fleet readiness (PBL)

ITOCHU Aviation Co.,Ltd.

Core Domain & Target Areas

- Heavy strategic aircraft, Pilot physiological training systems

Strength in the Defence Industry

- Unshakeable ties with US mega-primes (e.g., Boeing) for heavy fleet sustainment

KANEMATSU AEROSPACE CORPORATION

Core Domain & Target Areas

- Avionics, Military-grade data buses, High-precision sensors

Strength in the Defence Industry

- Deeply embedded on the factory floors of Japanese Tier 1 primes (MHI, KHI, IHI)

Mitsubishi Corporation Machinery, Inc.

Core Domain & Target Areas

- Patriot missile defence, Aegis destroyer combat systems

Strength in the Defence Industry

- Secretariat capabilities for multi-billion dollar G2G (FMS) classified projects

TOYOTA TSUSHO CORPORATION

Core Domain & Target Areas

- Dual-use assets, Autonomous mobility, Commercial satellite data

Strength in the Defence Industry

- Utilizing Toyota's manufacturing supply chain & commercial auto-tech for defence

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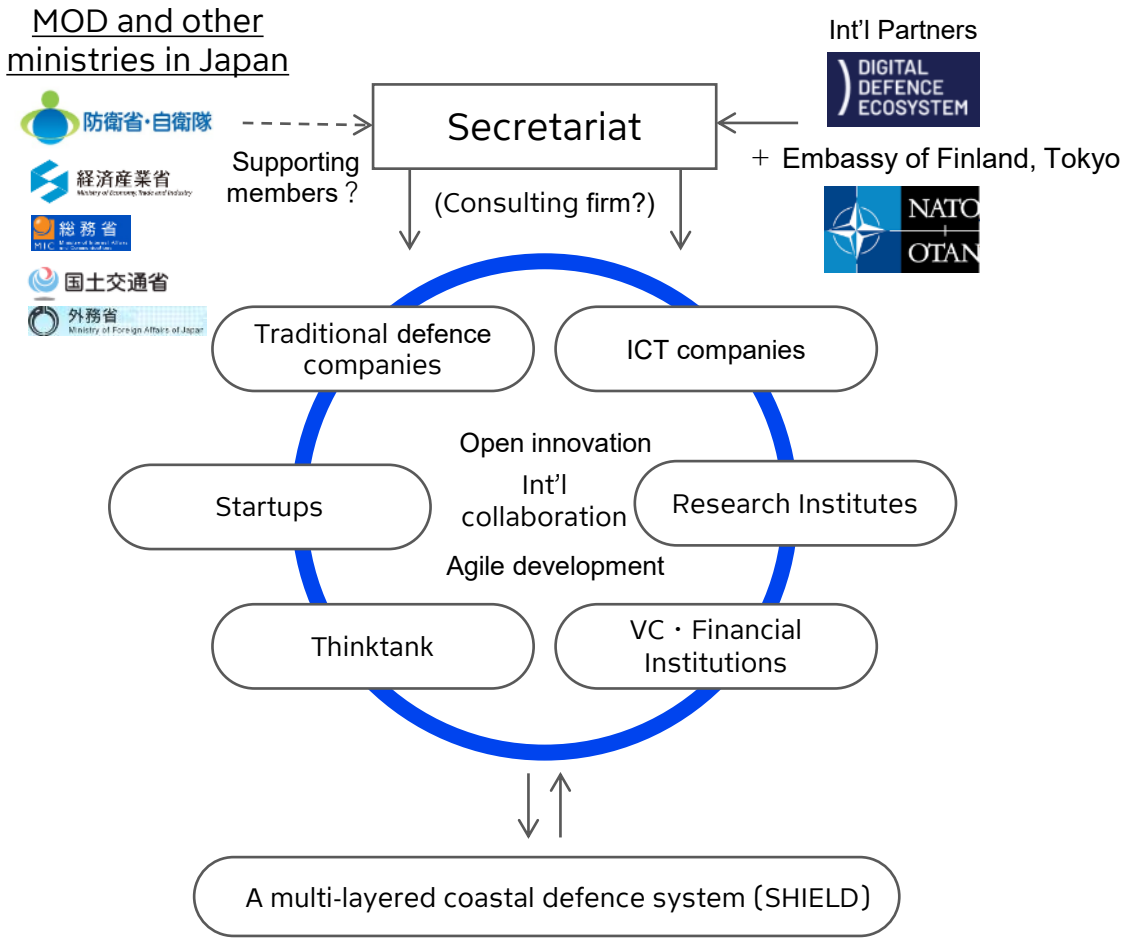
Japan's Digital defence Ecosystem (plan)



Target areas & areas where Finland has strengths

1	Countermeasures for cognitive and information warfare	AI-based deepfake detection and OSINT analysis platform
2	Autonomous Systems and AI	Group control technology for unmanned aerial vehicles (UAVs and UGVs)
3	Secure communication infrastructure	A communications network that integrates satellite constellations and terrestrial 5G/6G
4	CPS	A command & control system that recreates the battlefield as a digital twin and predicts the battle situation in real time
5	Cyber Resilience	Building rapid recovery capabilities after attacks, and a comprehensive security system in collaboration with the government, private sector, and the Self-defence Forces
6	Space Infrastructure	Encrypted data communication by small satellites (SAR satellites)
7	HMI	Intuitive UI and UX design to prevent malfunctions in extreme environments (extremely cold regions, high stress situations)

Note: CPS = Cyber Physical Systems, HMI = Human Machine Interface

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Go to market strategy and our supports (best effort basis)

	STEP-1	STEP-2	STEP-3	STEP-4
	Detailed research on the Japanese market	**G2M strategy formulation**	**Networking & business development**	**Product & Solution Sales (Direct Sales & Strategic Partners)**
Process of G2M strategy	Understand the size of the target market, the competitive landscape, customer needs, and more.	Identifying target markets, product positioning, sales channel selection, marketing strategies, pricing, and customer support	Clarifying target customers, understanding their needs, effective approach, relationship building, and continuous follow-up	Choose the best channels to target customers. For traditional and conservative companies, strategically utilize influential people as intermediaries.
Our supports	■ Providing basic information about the target market ■ Support for detailed research(introductions to information-related websites)	■ Review, evaluate and provide strategic advice on G2M strategies	■ To introduce industry insiders, potential customers, and experts, (best effort basis) and provide advice on business development plans.	■ Advice on selecting strategic partners, preparation of a list of specific partner companies, and interview support

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FYR: High-Level Team Finland Visit to Japan in May 2026

22May26: UAVs discussion meeting held in cooperation with the Japan Air Self-Defense Force (ASDF)

<Participants> Japan side: Air SDF, Maritime SDF, Ground SDF, MHI, Fujitsu, NEC, Sumitomo Corporation, NODE X
Finland side: Insta Advance, SARA Center, Xiphera, Core HQ, XD Solutions / DDE (Digital Defence Ecosystem)
Note: SDF = Self-Defence Force)

21May26: Finland-Japan Critical Technologies Seminar

It was a great success with a total of 150 participants + 3 major TV companies and a major economic newspaper came to cover the event.

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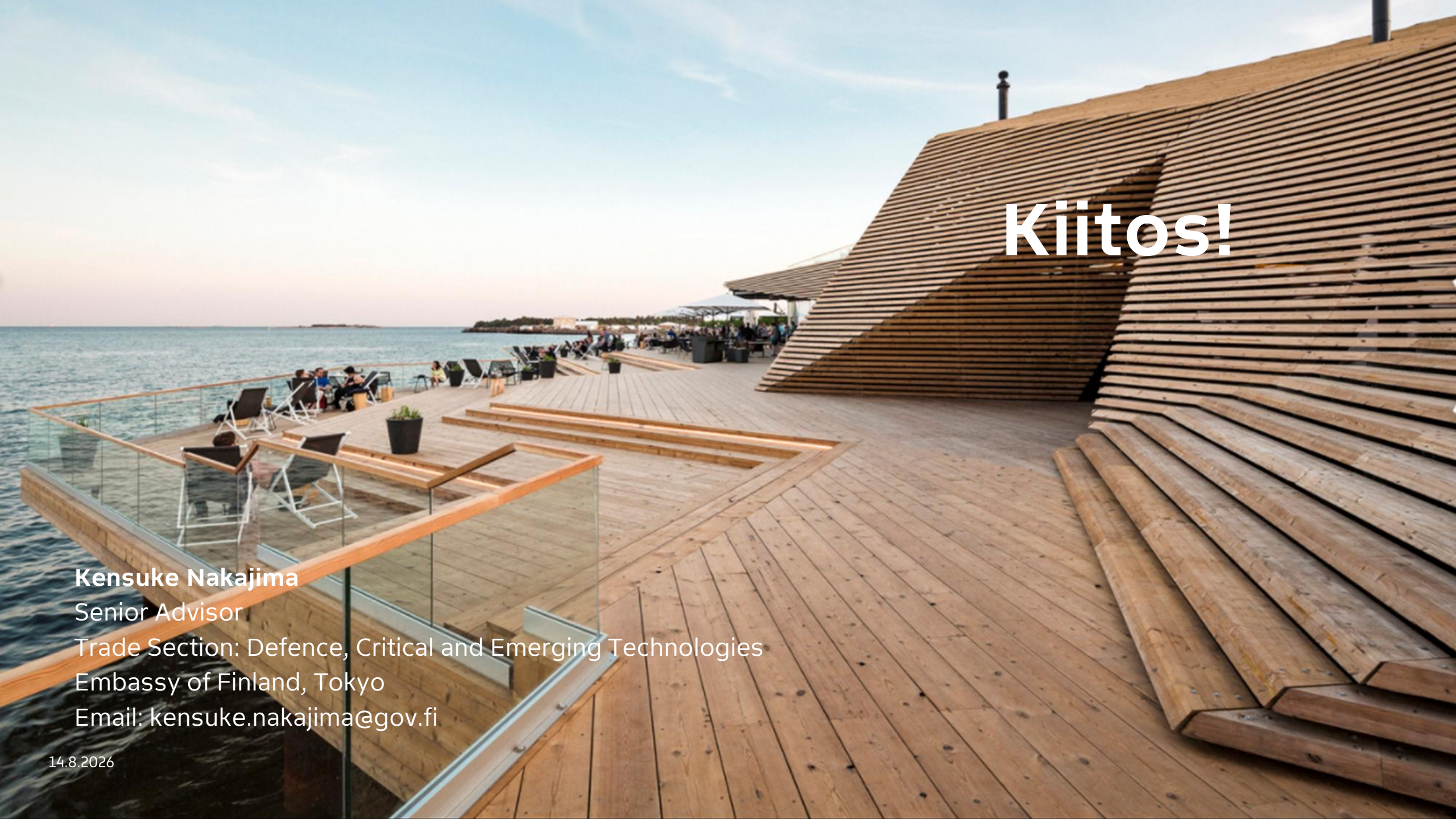

Kiitos!

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