

JAPANESE PERCEPTIONS OF COOPERATION WITH POLAND IN THE HI-TECH SECTOR

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October 2026

SUMMARY

This policy brief analyses Japanese perceptions of cooperation with Poland in the hi-tech sector. The analysis aims to examine how Japanese stakeholders (government and business) perceive Poland's hi-tech ecosystem and to propose strategic pathways for deepening bilateral technology collaboration. This brief is based on materials published between 2015 and 2026 in English or Japanese, introducing the current view of cooperation with Poland in Japan in the hi-tech sector. As the key findings suggest, Japan's tendency to view Poland primarily as a cost-effective regional gateway risks missing direct bilateral opportunities in Poland's rapidly maturing deep-tech ecosystem.

KEY FINDINGS

1. **Dominance of regional context:** Japanese engagement remains primarily framed around the Central and Eastern Europe (CEE) nearshoring and supply-chain access to Western Europe (especially Germany), rather than direct bilateral R&D.
2. **Public-Private perception gap:** The Japanese government actively views Poland as a strategic frontline partner in economic security and reconstruction of Ukraine, while private firms prioritize cost efficiency, talent acquisition, and risk mitigation.
3. **High-Interest sectors:** IT/Software development, EV battery supply chains, clean energy transition (offshore wind, nuclear/SMR), and defense/dual-use technologies.
4. **Key barrier:** Proximity to the war in Ukraine creates heightened geopolitical risk perceptions among Japanese investors, compounded by rising domestic labour and energy costs in Poland.

INTRODUCTION

Global supply chain shifts, focused on economic security and resilience, have made the hi-tech intersection of Japan and Poland strategically important for both governments and corporate leaders. Economic cooperation has grown steadily since formal relations were restored in 1957.¹ Today, Poland hosts the largest number of Japanese companies in the CEE region, with 392 firms operating as of 2025.²

Historically, these ties centered on heavy manufacturing; Toyota entered the Polish market in 1991 and opened a major manufacturing plant in 2002,³ and Daikin launched a new heat pump production facility in 2026.⁴ These examples highlight that both major global corporations continue to view Poland as a key destination for investment and business expansion. Also, startups and other small businesses are beginning to turn their attention to Poland. For example, Japanese IT venture Rococo, which provides IT outsourcing and facial recognition systems, established Rococo Poland in Lodz in 2025 as a research and development hub for facial recognition technology.⁵ Furthermore, Annex Digital Japan, a small Japanese creative firm specializing in video production and CG, established Annex Digital Poland in Lodz in 2023 as the first Japanese-affiliated video production company in Poland.⁶ While major cities like Warsaw and Kraków serve as broad IT hubs, the city of Lodz has emerged as a distinct cluster for Japanese tech investments. This connection was largely catalyzed by the early establishment of Fujitsu's massive Global Delivery Centre and the active support of the Lodz Special Economic Zone.⁷

¹ Ewa Pałasz-Rutkowska, "Japan-Poland Relations," Polish Institute in Tokyo, 2019

² Ministry of Foreign Affairs of Japan (MOFA), Annual Survey of Japanese Companies Operating Overseas 2025 (Tokyo: MOFA, 2025)

³ Toyota Motor Corporation, "Toyota Holds Opening Ceremony for Polish Plant," Toyota Global Newsroom, 2002

⁴ Daikin Industries, Ltd., "Daikin Inaugurates New Heat Pump Production Site in Poland," Daikin Press Release, 2026

⁵ Rococo Co., Ltd., "Opening Ceremony of Rococo Poland Held ", 2025

⁶ Annex Digital Japan, "About Annex Digital Japan", 2025

⁷ Fujitsu, "Fujitsu in Poland," Fujitsu Global, accessed September 21, 2026

However, today's policy focus has shifted toward digitalization, technology transfer, and cybersecurity. This shift reflects a broader urgency among Japanese corporations to secure high-quality human capital and R&D bases in Europe.

Given these developments, this policy brief examines the Japanese-Polish collaboration in the hi-tech sector. Rather than a comparative analysis of economic exchanges, it is intended as an examination of the relationship between perceptions and business decisions of Japanese actors concerning Polish hi-tech environment. It also asks, how Japanese state and business's views of Poland as a strategic and business partner differ in the sector.

This brief addresses the core research question: How does Japan view Poland as a cooperation partner in the hi-tech sector—specifically, is Poland viewed primarily through a regional context or as a direct partner in bilateral economic relations?

METHODOLOGY AND STRUCTURE

The analysis is based on a qualitative review of 32 primary and secondary sources published in English and Japanese between 2015 and 2026. The materials reviewed include government frameworks (Ministry of Economy, Trade and Industry [METI], Ministry of Foreign Affairs of Japan [MOFA]), bilateral joint statements, Japan External Trade Organization [JETRO] surveys, corporate investment records, and business media reports. The analysis consisted of a structured review process. First, the sources were classified according to their originating actors (state institutions or private enterprises) and their geographical scope (regional or bilateral). Then, the documents were thematically analysed to extract the core priorities driving each sector, such as economic security for the government and talent acquisition for businesses. Finally, by comparing macro-level policy data with specific corporate case studies, the research identifies practical gaps between diplomatic goals and on-the-ground business realities.

Structurally, the brief separates state and business perspectives, recognizing that public policy objectives do not automatically lead to private capital investments. First, it looks at the state level perceptions alongside the business level perceptions, which are crucial for understanding the complete dynamic of Japanese decisions regarding the collaboration

with Poland. The analysis also applies a regional versus bilateral perspective, as Japan's approach to Poland is closely tied to broader CEE regional supply chains and Ukraine's reconstruction. Following this breakdown, the brief concludes with targeted recommendations for institutionalizing these economic ties.

JAPANESE PERCEPTIONS OF POLAND IN HI-TECH COOPERATION

The analysed Japanese perceptions regarding hi-tech cooperation with Poland are primarily shaped by two distinct but interconnected groups: government officials and private-sector companies. While their strategic priorities sometimes diverge, their focus converges on four critical technological domains: IT (specifically artificial intelligence), energy, cybersecurity, and defence security.

Japanese stakeholders concentrate their attention on sectors where Poland's emerging capabilities directly address Japan's domestic needs and global vulnerabilities. Fundamentally, Japan's underlying motivation for seeking international technology partnerships stems from the urgent need to accelerate corporate digital transformation (DX) amidst a shrinking domestic workforce.⁸ To overcome these structural limitations, Japanese firms are actively pursuing open innovation and cross-border venture investments to secure early access to next-generation technologies.⁹

- **IT and Artificial Intelligence (AI):** Facing a severe domestic shortage of digital professionals, Japanese companies view Poland as a premier destination for software engineering and AI development. Poland is recognized not merely for basic IT support, but for advanced digitalization and R&D capabilities. In practice, Fujitsu operates large-scale global delivery centers in Lodz, employing thousands of IT professionals.¹⁰
- **Energy:** Japanese entities are highly interested in Poland's shift toward renewable energy sources (RES) and alternative power technologies, which are crucial for sustainable supply chains. A concrete example is the growing

⁸ Ministry of Economy, Trade and Industry (METI), "Survey on IT Human Resources Supply and Demand", 2019

⁹ METI, "Guidebook for Collaboration between Business Corporations and R&D Venture Companies (3rd Edition)", 2019

¹⁰ Fujitsu, "Fujitsu in Poland," Fujitsu Global, accessed September 21, 2026

cooperation in next-generation nuclear energy. Polish energy firm Orlen Synthos Green Energy (OSGE) is advancing plans to deploy BWRX-300 Small Modular Reactors (SMRs), a project that directly involves Japanese technology through the US-Japan joint venture, GE Hitachi Nuclear Energy.¹¹ Furthermore, in 2026, Eurus Energy and EDF launched large-scale solar and battery energy storage (BESS) projects. These investments support Poland's renewable expansion and transformation, and address critical grid stabilization needs, highlighting Japan's direct contribution to the green transition.¹²

- **Cybersecurity and Defense:** Following geopolitical shifts in Eastern Europe, Japan and Poland have significantly expanded the scope of their strategic partnership to enhance security and defense cooperation.¹³ Building on this foundation, both nations have explicitly shifted their bilateral priorities toward cybersecurity and dual-use defence technologies, as underscored in recent joint frameworks.¹⁴ Poland is increasingly viewed as a key partner for developing secure data infrastructures and dual-use technologies to ensure regional resilience.

These perceptions are driven by actors who approach the hi-tech sector with differing methodologies.

From a governmental and strategic perspective, state actors—such as ministries (e.g., METI, MOFA) and agencies like JETRO—evaluate Poland through a strategic lens as a crucial partner in an increasingly volatile geopolitical environment. Their focus is heavily centered on economic security, cybersecurity, and energy cooperation. For example, in a 2026 joint statement, Prime Minister Sanae Takaichi and Polish Prime Minister Donald

¹¹ Hitachi-GE Nuclear Energy, "Cooperation for the Introduction of Small Modular Reactors (SMRs) in Poland," Hitachi-GE News, 2026

¹² Eurus Energy Holdings Corporation, "First Entry into the Republic of Poland: Promoting Solar Power Generation and Grid Battery Storage Businesses," Eurus Energy News, 2026

¹³ Ministry of Foreign Affairs of Japan, "Joint Statement on Special Global Partnership Between Japan and Ukraine", 2023

¹⁴ Ministry of Foreign Affairs of Japan. "Joint statement of the Prime Minister of Japan Takaichi Sanae and the Prime Minister of the Republic of Poland Donald Tusk". 2026

Tusk committed to enhancing bilateral cooperation regarding economic resilience and security.¹⁵

On the other hand, private enterprises and business associations approach Poland pragmatically. Their engagement is rooted in economic viability, investment returns, and integrating Polish tech ecosystems into their broader European operations. Crucially, companies increasingly value Poland as a strategic solution to Japan's domestic IT workforce shortage, relying on its highly educated STEM talent pool. This approach is directly evidenced by the growing presence of tech hubs established by firms such as Fujitsu and Rakuten.

REGIONAL VS BILATERAL PERSPECTIVE

a. Bilateral perspective

The bilateral framing is primarily driven by the Japanese government, which views Poland through a strategic and security-oriented lens. Operating on the principle that the security of Europe and the Indo-Pacific are inseparable, Japan positions Poland as a crucial, value-sharing partner.¹⁶ This government-led approach promotes direct bilateral cooperation in economic security, supply chain resilience, and increasingly the reconstruction of Ukraine.

However, in the private sector, this bilateral view is only just emerging. It is largely confined to specific areas where Poland possesses unique strengths, such as its massive STEM talent pools, the gaming industry, and space technology. Backed by a robust STEM education framework, the country generates a deep pool of IT talent that regularly achieves top rankings in global programming assessments.¹⁷ In the game industry, Poland currently has 824 studios and employs 14,568 specialists. Additionally, 97% of the games developed in the country are sold in international markets, clearly showing its

¹⁵ Ministry of Foreign Affairs of Japan (MOFA), "Joint Statement of the Prime Minister of Japan Takaichi Sanae and the Prime Minister of the Republic of Poland Donald Tusk," MOFA, 2026.

¹⁶ Ministry of Defense of Japan, Defense of Japan 2025 (Tokyo: Ministry of Defense, 2025), p. 379

¹⁷ Mynavi Corporation, Field Research Report on IT Industry and Human Resources in Five CEE Countries (Tokyo: Ministry of Economy, Trade and Industry, 2023), p. 10-11

status as one of Europe's top three game-producing nations.¹⁸ In the space sector, Poland is actively executing its national "Polish Space Strategy," which aims to capture 3% of the European space market by 2030.¹⁹ Reflecting this development, bilateral space cooperation between Japan and Poland has recently gained formal momentum. In 2026, the Polish Space Agency (POLSA) and the Japan Aerospace Exploration Agency (JAXA) signed the Joint Statement on POLSA-JAXA Potential Civil Space Cooperation. This agreement aims to deepen direct dialogue and explore joint initiatives.²⁰

b. Central and Eastern Europe perspective

In the CEE context, Japanese companies have increasingly viewed the region as an expanding market and a destination for business operations. According to the "2025 Survey on Business Conditions of Japanese Companies in Europe" conducted by JETRO, Poland ranked first as the most promising sales market for the seventh consecutive year.²¹ Executives of these Japanese companies mainly pointed to expanding market demand driven by economic growth, relatively low labour costs, and concrete business opportunities in sectors such as the automotive industry, semiconductors, and electronic components.²²

According to 2026 International Monetary Fund (IMF) data, Poland's GDP based on purchasing power parity (PPP) reached approximately \$2.16 trillion, ranking seventh in Europe and standing as the clear leader in CEE region. Its economic growth rate also exceeds 3.3%, well above other countries in the region such as neighbouring Czech Republic and Hungary.²³

These figures indicate that, compared to its neighbours, Poland offers greater scale and stability, making it the largest and most reliable operational base in the CEE. Given these trends, for Japanese firms looking to establish a presence in the emerging European

¹⁸ The Polish Agency for Enterprise Development (PARP), *The Game Industry of Poland* (Warsaw: PARP, 2025), p. 17-18

¹⁹ OECD, "Polish Space Strategy," STIP Compass, 2017

²⁰ JAXA, "Signing of the Joint Statement."

²¹ Japan External Trade Organization (JETRO), *2025 Survey on Business Conditions of Japanese Companies in Europe* (Tokyo: JETRO, 2025)

²² JETRO, "Growing Markets in Europe, Labor Costs on an Upward Trend," JETRO Area Reports, 2026

²³ International Monetary Fund (IMF), *World Economic Outlook* (Washington, DC: IMF, April 2026)

markets, Poland is consistently evaluated as the most strategic hub to oversee broader regional operations.

c. European Union perspective

The concept of nearshoring defines the broader EU perspective. A vast majority of Japanese corporations treat Poland fundamentally as a gateway to the Western European markets, particularly Germany. This is mainly due to the perceived deep supply chain integration between the two countries. Trading Economics data shows that approximately 30% of Poland's total exports are directed to Germany, primarily consisting of intermediate goods.²⁴ Furthermore, recent JETRO survey results confirm that Japanese manufacturers based in Poland consistently target Western Europe as their primary sales destination. In this framing, Poland serves as a cost-effective, high-quality manufacturing and IT support base, designed to sustain primary operations in the UK, France, and Germany.²⁵ Consequently, the core motivation for corporate entry is the optimization of the pan-European supply chains and IT infrastructure.

However, while this gateway perspective remains dominant, Poland's function is actively evolving. Corporate examples such as Daikin's recent large-scale investment in heat pump manufacturing²⁶ and Toyota's established production of hybrid and EV components mentioned in the beginning of this brief demonstrate a clear shift.²⁷ It emerges in specific strategic sectors—namely the clean energy transition and e-mobility—where Poland has successfully upgraded its role from a regional support node to a primary production hub for the entire European market.²⁸

d. Assessment of dominant framing

Ultimately, there is a clear difference in how the Japanese government and the private sector view Poland. The government focuses on a direct, strategic partnership, while

²⁴ Trading Economics, "Poland Exports by Country," Trading Economics, 2025

²⁵ JETRO, 2025 Survey on Business Conditions.

²⁶ Daikin Industries, "Daikin Inaugurates New Heat Pump."

²⁷ Toyota Motor Europe, "Toyota Starts Production of Hybrid Electric Drives in Poland for Yaris - The Car of the Year 2021," Toyota Europe Newsroom, 2021

²⁸ PAIH, The Automotive / Electromobility Sector (Warsaw: PAIH, 2023). This structural shift is underpinned by Poland's status as Europe's largest producer of lithium-ion batteries.

businesses still see Poland mainly as a regional hub. For most Japanese companies, Poland is valued primarily as a gateway to Western Europe or as a reliable base for the CEE region.

However, looking at specific sectors shows that this traditional view is starting to change. With growing cooperation in space and gaming, along with major investments by companies like Daikin and Toyota, Poland is taking on a much bigger role. While the regional perspective will remain important, the relationship is gradually moving toward a more direct partnership. Moving forward, treating Poland only as a regional support base could mean missing out on valuable opportunities in its growing technology and industrial sectors.

KEY OPPORTUNITIES AND CHALLENGES

In recent years Poland's advantages in the hi-tech sector have become pronounced, although the business opportunities go hand in hand with growing challenges. The interests of Japanese investors and what Poland and the broader region can offer converge. However, the knowledge and investment gap, concerning especially the startup ecosystem, becomes apparent under scrutiny. Meanwhile the ongoing geopolitical situation and rising operational costs seem to discourage Japanese investors from considering Poland.

- **Competitive advantages of Poland**

Poland offers clear advantages grounded in human capital and institutional stability. As mentioned, the country possesses a strong STEM education system, producing highly skilled IT professionals who consistently rank at the top of global programming competitions.²⁹ For Japanese tech firms, Poland provides an excellent cost-to-quality ratio in engineering; although Poland's average monthly income continues to rise alongside its economic expansion, it remains at a relatively low level when compared to Japan and Western Europe.³⁰ Additionally, Poland's strategic geographic positioning in the heart of

²⁹ Mynavi Corporation, Field Research Report on IT Industry and Human Resources in Five CEE Countries (Tokyo: Ministry of Economy, Trade and Industry, 2023), p. 10-11

³⁰ EY Japan, "Poland Attracting Attention as a Promising Investment Destination," EY Insights, 2021

Europe is reinforced by its full integration into the European Union. This provides Japanese investors with the critical reassurance of EU legal protections, a stable regulatory framework, and seamless access to the European Single Market.

- **Areas of interest for Japanese actors**

Japanese engagement currently centers on several sectors where Japan's domestic needs match Poland's specific strengths. In IT and AI, METI estimates that although the IT workforce will increase, demand will grow much faster, creating a supply-demand gap of 410,000 to 790,000 professionals by 2030.³¹ In contrast, Poland offers a talent pool of over 400,000 software developers, which is the highest number in the CEE countries.³² Cooperation is also broadening in clean energy and mobility. Beyond traditional automotive manufacturing, Japanese firms are becoming integral to Poland's rapidly expanding electric vehicle (EV) supply chain. For instance, Mitsui High-tech has established its first European motor core production hub.³³ They have recently expanded this major facility to manufacture traction motor cores, a critical component for EV and hybrid drives.³⁴ In parallel, they are expanding into the renewable energy market. A recent example is Eurus Energy's investment in solar power and battery storage (BESS) under Poland's PEP2040 framework. High-tech and regional cooperation are also developing. The 2026 POLSA-JAXA joint statement sets a clear basis for space and satellite collaboration.³⁵ Additionally, as JETRO reports, Poland serves as a central platform for Ukraine's reconstruction framework, recently hosting the major Ukraine Recovery Conference. For Japan, contributing to Ukraine's recovery represents both a geopolitical commitment to uphold international order and a strategic opportunity to deploy its advanced infrastructure and green technologies.³⁶ This positioning creates practical

³¹ METI, "Survey on IT Human Resources Supply and Demand", 2019, p. 17

³² Polish Investment and Trade Agency (PAIH), "The IT Sector in Poland", 2023, p. 10

³³ Mitsui High-tech, "Project Story 03: The 'European New Base Preparation Office' Project that Led to Successful European Expansion," Mitsui High-tech Recruitment

³⁴ Atlas Ward, "The Rite of Laying a Cornerstone at the Mitsui High-Tec Construction Site," Atlas Ward, 2024

³⁵ JAXA, "Signing of the Joint Statement."

³⁶ Ministry of Foreign Affairs of Japan (MOFA), "Japan-Ukraine Conference for Promotion of Economic Growth and Reconstruction," MOFA, 2024

opportunities for joint infrastructure initiatives, directly aligning with the "Japan-Ukraine Action Plan" to cooperate on rebuilding energy systems and technology sectors.³⁷

- **Information and Investment Gap in the Startup Ecosystem**

Despite Poland's strong foundation in IT talent, a structural information gap limits Japanese investment in local startups. The primary issue from the Japanese side is a lack of on-the-ground networking. Unlike traditional manufacturing, early-stage innovations and startup deals are shared through private, local connections rather than public channels. Therefore, for Japanese corporations, active local engagement is essential not just for financial return, but for securing early access to cutting-edge technologies, such as AI and deep tech, that are urgently needed to drive their own corporate innovation and DX.³⁸ According to the 2025 JETRO survey, over 80% of Japanese firms operating in Europe are headquartered in traditional Western European hubs, such as Germany, the UK, and France.³⁹ Thus, this physical distance between Western based operations, as well as even longer distance from Japan, creates a disconnect in target investment stages.

According to the Central and Eastern European Startups 2025 report by Dealroom, the region's early-stage ecosystem is highly active and primarily funded by local entities. However, for Series B rounds and beyond, startups face a shortage of local capital and rely heavily on foreign funds.⁴⁰ While Japanese CVCs generally target these exact later stages, their lack of local networks means they fail to identify growing startups early on. As a result, US funds often secure these late-stage deals before Japanese investors can engage.

This dynamic is part of a broader funding imbalance. Dealroom data shows that while the CEE tech sector reached an enterprise value of €243 billion in 2025, it recorded only €2.3 billion in VC funding over the past year.⁴¹ These figures indicate that venture capital,

³⁷ JETRO, "Ukraine Recovery Conference: Accelerating Cooperation with Foreign Companies in Energy and Defense Sectors," JETRO Biz News, 2026

³⁸ METI, "Guidebook for Collaboration between Business Corporations and R&D Venture Companies (3rd Edition)", 2019

³⁹ JETRO, 2025 Survey on Business Conditions.

⁴⁰ Dealroom, Central and Eastern European Startups 2025 (Dealroom.co, 2025)

⁴¹ Dealroom, Central and Eastern European Startups 2025.

including investment from Japan, remains concentrated in Western Europe, leaving the CEE market relatively undercapitalized.

Main challenges

The primary challenges for Japanese actors seeking cooperation with Poland include:

- **Geopolitical Risks**

Poland's status as a frontline state bordering Ukraine, Belarus, and Russia creates significant risk aversion. According to a JETRO survey of Japanese companies in Europe, the situation in Ukraine was cited as the top operational challenge in the CEE region. This reflects underlying concerns that geographical proximity leaves local businesses vulnerable to geopolitical instability.⁴² Given its shared border with Ukraine, these concerns are naturally most pronounced in the case of Poland among the CEE nations.

- **Rising Operation Costs**

Central Europe is currently navigating significant wage inflation and energy price volatility. While Poland is still perceived as more affordable than Western Europe, the diminishing "low-cost" margin makes it increasingly difficult to hire top-tier tech talent purely on a budget-driven strategy. In the same JETRO survey, rapid labour cost increases were cited as the second most common operational challenge. Notably, Japanese firms operating in Poland reported this issue at the highest rate among all countries surveyed.⁴³ Beyond rising wages, 55.6% of firms in Poland cited general inflation as a major operational hurdle. Furthermore, securing and retaining personnel is becoming increasingly difficult, with over 60% of companies across the CEE region attributing this to intensifying competition for talent with rival firms.⁴⁴

⁴² JETRO, 2025 Survey on Business Conditions.

⁴³ JETRO, 2025 Survey on Business Conditions.

⁴⁴ JETRO, 2025 Survey on Business Conditions.

POLICY IMPLICATIONS AND RECOMMENDATIONS

To transition the Japan-Poland relationship from a regional manufacturing dependency to a strong, bilateral technology partnership, key stakeholders should implement the following targeted initiatives:

- For Polish Policymakers (Update the Promotional Narrative):** While the Polish Investment and Trade Agency (PAIH) actively promote the domestic IT sector—as highlighted in its 2025 Information Communication Technology Sector report⁴⁵—Japanese corporate boards still largely view Poland as a cost-effective manufacturing base. Current promotional efforts tend to emphasize the region's broad pool of IT talent and general software development capabilities. To shift this outdated Japanese perception, PAIH should refine its marketing strategy in Tokyo. Rather than general foreign direct investment (FDI) promotion, efforts should pivot toward targeted deep-tech advocacy. By directly engaging Japanese corporate R&D divisions and venture arms, PAIH can reposition Poland not simply as an IT outsourcing hub, but as a strategic innovation partner in high-value fields such as artificial intelligence, dual-use technologies, and clean energy.
- For Polish and Japanese Businesses (Institutionalize Direct Innovation Channels):** As the contrasting data from JETRO and Dealroom demonstrates, while public agencies on both sides are actively trying to bridge this information gap, private capital remains structurally disconnected. To translate Japan's pressing need for open innovation into actual investment, single promotional events are insufficient. Industry associations and government bodies must establish permanent, bilateral matchmaking mechanisms. By creating dedicated channels that directly connect Japanese CVC funds with Polish deep-tech startups—bypassing traditional Western European hubs—both countries could institutionalize a pipeline that integrates Polish STEM talent into Japan's DX initiatives.

⁴⁵ Polish Investment and Trade Agency (PAIH), The Information Communication Technology Sector (Warsaw: PAIH, 2025)

- **For Both Governments (Mitigate Geopolitical Investment Risks):** Japanese corporate boards remain highly risk-averse regarding investments in frontline states. While Japan operates existing investment insurance frameworks through agencies like Nippon Export and Investment Insurance (NEXI)⁴⁶, these tools must be explicitly adapted and expanded for the CEE context. Specifically, both governments should collaboratively set up new joint credit lines and dedicated risk-guarantee categories within these existing frameworks. While expanding these safety nets will eventually benefit a wider range of industries, the immediate focus should be on strategic joint ventures in clean energy, deep-tech, and Ukraine's reconstruction. Providing this targeted institutional assurance is essential to unlock long-term, large-scale capital commitments.

CONCLUSIONS

The Japan-Poland relationship in the hi-tech sector is in a transitional phase. Historically, Japanese businesses have approached Poland primarily as a cost-effective manufacturing base and a regional gateway to Western Europe. However, as this brief outlines, this traditional framing is no longer sufficient. Driven by Japan's domestic IT talent shortages and a changing geopolitical landscape, the foundation for a direct technology partnership is already forming in sectors such as artificial intelligence, clean energy, and space.

Despite this progress, a structural disconnect remains. While the Japanese government actively treats Poland as a key strategic partner, private capital continues to bypass the Polish startup ecosystem. This is largely due to institutional information gaps, rising operational costs, and persistent concerns over geopolitical risks.

To bridge this gap, both nations must move beyond conventional business models. By refining promotional strategies to focus on deep-tech, establishing direct investment pipelines for Japanese CVCs, and adapting existing risk-mitigation tools like NEXI, stakeholders could effectively mobilize private capital. Continuing to view Poland merely

⁴⁶ Nippon Export and Investment Insurance (NEXI), "Overseas Investment Insurance," NEXI, accessed September 21, 2026

as a regional support hub could potentially mean that Japanese investors miss an opportunity to engage with a highly capable innovation partner. By implementing these targeted initiatives, Japan and Poland could successfully upgrade their economic ties into a strong, bilateral technology partnership.

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