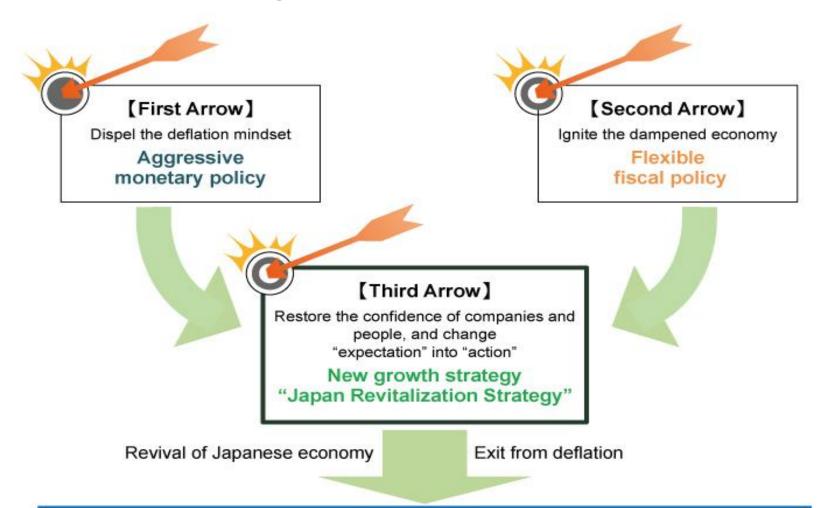
# [Three Prongs or "Arrows" of ABENOMICS]



The administration aims to achieve

an average 3% nominal GDP growth and 2% real GDP growth over the next ten years.

This is expected to increase the per capita nominal gross national income (GNI)

by no less than 1.5 million yen in ten years.

### Outlook of Japanese Economy before/after Abenomics

#### 1. GDP Growth

	CY		FY		2012 CY			2013 CY	
	2011	2012	2011	2012	Apr-Jun	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jun
GDP (Changes from the previous quarter)					-0.3	-0.9	0.3	1.0	0.9
(Changes from the previous quarter, annualized)	-0.6	2.0	0.3	1.2	-1.2	-3.5	1.1	4.1	3.8
(Changes from the previous year)					3.8	0.3	0.4	0.3	1.2

#### 2. Financial Market

	2012	20	13	2013			
	Oct-Dec	Jan-Mar	Apr-Jun	Jun	Jul	Aug	
Tokyo Stock Price Index (TOPIX)	765	965	1,135	1,089	1,187	1,145	1,189 (9/11)
The NIKKEI Stock Average (yen) (TSE 225 issues)	9,209	11,458	13,629	13,107	14,318	13,727	14,425 (9/11)

3. Unemployment Rate

Annual average						
	2010	2011	2012			
Unemployment rate	5.1%	<4.6%>*	4.3%			

<sup>\*</sup>Due to the Great East Japan Earthquake, results for whole Tohoku are

Actual figures Seasonally adjusted

Jan-Mar Apr-Jun July Aug

4.3% 4.2% 3.8% 4.1%

missing from Jan.-Mar., through Jul.-Sep. 2011. So the "supplementary estimated figures" are inputted for seasonal adjustment.

# The Third Arrow: Japan Revitalization Strategy [Roadmap to Growth]

#### Unleashing the power of the private sector to the fullest extent

- Speeding up the restructuring of industries and accelerating venture businesses
- Regulatory and institutional reform and opening up government enterprises

#### Participation by all & fostering human resources who can succeed in the global competition

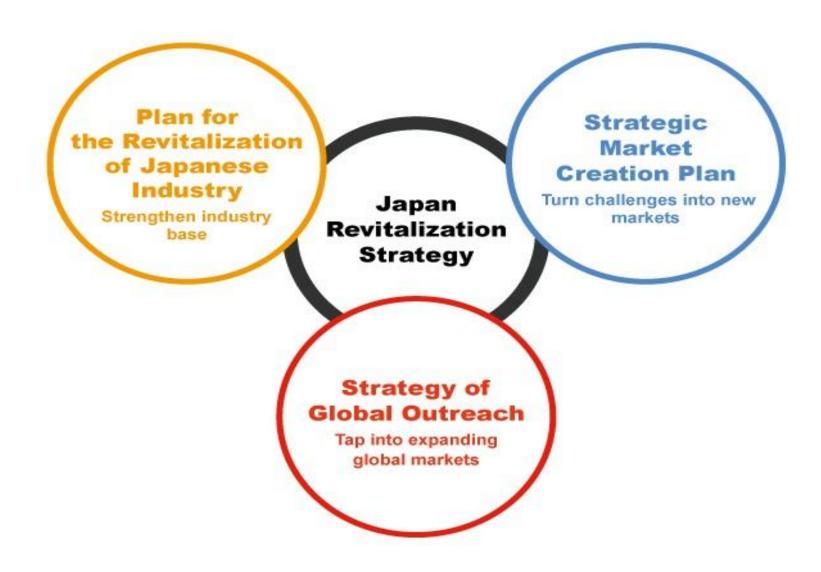
- Creating women-friendly work environments and restoring vitality to society
- Creating a society in which both youth and the elderly can work with vitality by taking greater advantage of their capabilities
- Developing Japan's youth into globally competitive human resources

#### Creating new frontiers

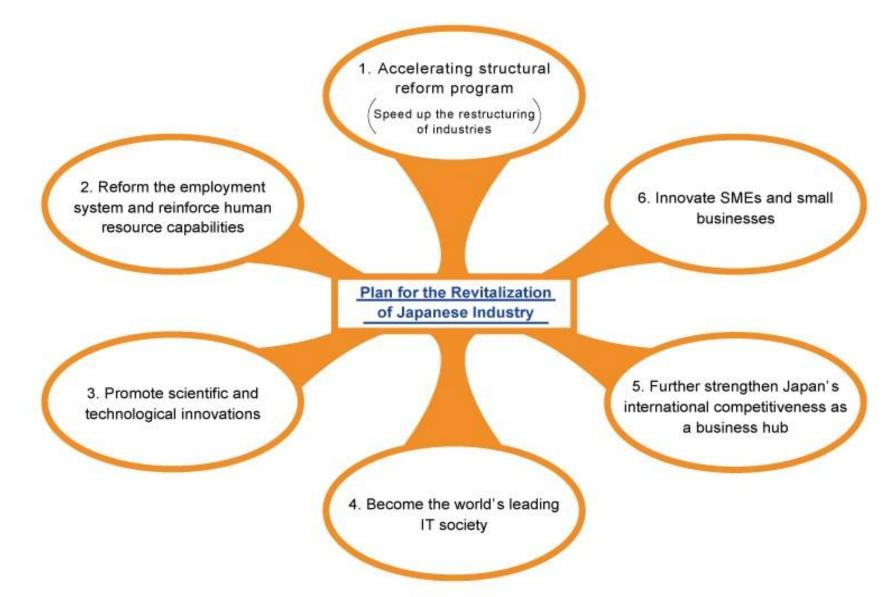
- Reviving Japan as a "technologydriven nation" and "intellectual property-based nation" through an all-Japan effort
- Leaping into the world and attracting the world

Redistributing the fruits of growth to peoples' lives

# [Three Action Plans of "Japan Revitalization Strategy"]



## (1) Plan for the Revitalization of Japanese Industry



## (2) Strategic Market Creation Plan

Extend the nation's healthy
 life expectancy

Build regional
 communities that use their
unique local resources to appeal
 to the world

Strategic Market Creation Plan

Realize clean and economical energy demand and supply

 Develop next-generation safe, convenient and economical infrastructure

# (3) Strategy of Global Outreach

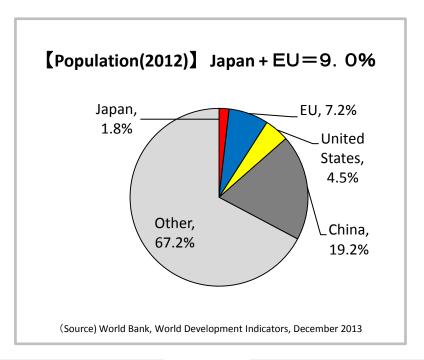
Establish strategic commercial relations and promote economic partnerships

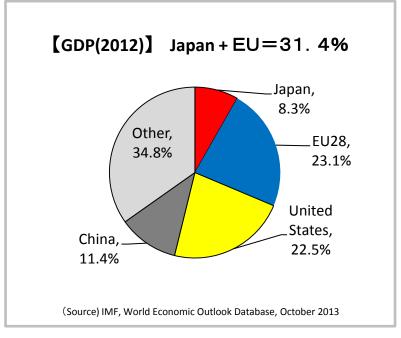
Strategy of Global Outreach

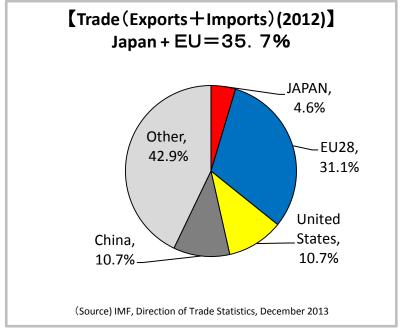
Strategic initiatives to capture global markets Develop funding and human resource bases that support the growth of Japan

# Benefits of Japan-EU Economic Partnership Agreement (EPA)

- Japan and the EU are important global partners which share fundamental values such as democracy, rule of law, and basic human rights.
- The Japan-EU EPA will promote trade and investment of both sides through eliminating tariffs and improving trade and investment rules. It will contribute to boosting economic growth, creating employment and strengthening business competitiveness both in Japan and the EU. It will also promote inroads into the European market by Japanese companies.
- •An economic partnership agreement between the two advanced market economies will contribute to the stable growth of the world economy and global rule-making in trade and investment.







# You Are All Welcome to 2020 Tokyo Olympic and Paralympic Games!



Thank You