

2017 White Paper on Information and Communications in Japan

Table of Contents

Part 1 Special Theme — Data-driven Economy and Social Change

Chapter 1

Present and Future of Smartphone Economy	2
Section 1 Advent of Smartphone Society	2
1. Smartphone Utilization Situation Indicated by Numerical Data.....	2
Section 2 New Services Facilitating Expansion of Smartphone Economy	4
1. Dissemination of Smartphone-related Services.....	4
2. Impact of New Smartphone Services.....	5
3. Smart phone Use and Its Consumption Promotion Effects.....	7
Section 3 Online Platform and Data Utilization	8
1. Two Sides of Online Platform.....	8
2. Hopes on New Innovation and Safe/Secure Data Distribution.....	9
3. Considering Post-Smartphone Society.....	10

Chapter 2

Advent of the Age of Big Data Utilization	12
Section 1 Expanding Distribution and Utilization of Data	12
1. Definition and Scope of Big Data.....	12
2. Progress in Data Distribution and Utilization.....	13
3. New Data Distribution and Utilization Trends.....	14
4. ITAC (IoT Acceleration Consortium) Initiatives.....	15
Section 2 Problems in Distribution and Utilization of Data	15
1. Need for Developing Environment for Safe/Secure Data Distribution and Utilization.....	15
2. Open Data Initiatives and Problems at Local Governments.....	17
3. Present Situation and Problems for Companies.....	17
4. Awareness Gaps between Consumers and Companies.....	18
Section 3 Broadening International Discussion	20
1. Current Status and Problems for Cross-border Data Distribution.....	20
Section 4 Future Outlook Compilation and Recommendations	22
1. Comparing International Infrastructure for Data Distribution and Utilization.....	22
2. Recommendations Regarding Future Outlook.....	23

Chapter 3

Changes Brought About by the 4th Industrial Revolution	24
Section 1 Global Trends Brought About by the 4th Industrial Revolution	24
1. Global Activities Based on the 4th Industrial Revolution.....	24
2. Trends brought about by the 4th Industrial Revolution.....	25

Section 2	Initiatives and Challenges for the 4th Industrial Revolution	26
1.	Corporate Awareness of the 4th Industrial Revolution, and Measures Being Taken	26
2.	Challenges to Realizing the 4th Industrial Revolution	28
Section 3	Development of IoT in the Information and Communications Industry	28
1.	New Communications Technology Supporting the IoT	29
2.	Trends Observed in Layers	29
3.	International Comparison of Progress Indicators in IoT	30
Section 4	Verification of Effect of ICT Investment Using Input-Output Table	31
1.	Did the Digitization of Industry Lead to Economic Growth? – The Reason Japan’s ICT Investment and ICT Human Resources Development has Fallen Behind –	31
Section 5	Comprehensive Analysis of the 4th Industrial Revolution	32
1.	Data-driven Economic Growth	32
2.	Japan in 2030 after adopting the IoT	34

Chapter 4

	ICT Utilization Useful for Solving Social Problems	38
Section 1	Advent of Depopulating Society and Countermeasures	38
1.	Accelerating decrease in working-age population	38
2.	Current employment situation	38
3.	Direction of solutions	38
Section 2	Working Style Reform and ICT Utilization	39
1.	Expansion of labor force participation through promotion of teleworking	39
Section 3	Regional Revitalization and ICT Utilization	41
1.	ICT utilization supports the tourism nation	41
Section 4	Potential of Expanding ICT Utilization	42
1.	ICT spreading in our daily life	43
2.	ICT utilization spreading to the world	43

Chapter 5

	The 2016 Kumamoto Earthquake and ICT Utilization	45
Section 1	ICT Utilization at the Time of Disasters	45
1.	ICT Utilization at the Time of the Great East Japan Earthquake	45
2.	Changes in ICT Utilization Environment after the Great East Japan Earthquake	45
Section 2	Results of the Survey on ICT Utilization at the Time of the 2016 Kumamoto Earthquake	46
1.	Outline of the 2016 Kumamoto Earthquake	46
2.	Informational Behavior at the Time of the 2016 Kumamoto Earthquake	46
3.	The 2016 Kumamoto Earthquake and Business Continuation	48
Section 3	The 2016 Kumamoto Earthquake and New Means of Sharing Disaster Information	49
1.	Information Transmission by Local Governments	49
2.	Information Transmission by Residents (SNS)	49
3.	Complementary Use of Diverse Information Transmission and Information Sharing Means	49
Section 4	Lessons from the 2016 Kumamoto Earthquake and ICT	50
1.	Information Communication and Sharing in Disaster-stricken Areas and Roles of ICT	50
2.	Active Utilization of New ICT Tools and Expected Effects	52
3.	Business Continuation at the Time of a Disaster and ICT	52
Section 5	Promotion of Computerization in Disaster Prevention Field	52
1.	Compilation of “the Report of the Project to Eliminate People with Inadequate Access to Information”	52

2. Initiatives in Relation to Foreign Nationals.....	52
3. Initiatives in Relation to Elderly People.....	53
4. Major Initiatives for Infrastructure Development that Enables Information Transmission upon a Disaster.....	53
5. Other Initiatives: Promotion of G-Space Information Use.....	53

Part 2 Basic Data and Policy Directions

Chapter 6

Basic Data on the ICT Field	56
Section 1 ICT Industry Trends	56
1. Economic size of the ICT industry.....	56
2. ICT industry contributions to the national economy.....	58
3. Research and development in the ICT field.....	58
4. State of ICT enterprise operations.....	60
5. Telecommunication market trends.....	61
6. Broadcasting market trends.....	61
7. Content market trends.....	63
Section 2 ICT Service Usage Trends	66
1. Internet usage trends.....	66
2. State of telecommunication service provision and usage.....	72
3. State of broadcasting service provision and usage.....	75
4. Promoting ICT applications in government services.....	76
Section 3 Radio Spectrum Usage Trends	77
1. State of radio spectrum usage and number of radio stations.....	77
2. Radio surveillance to eliminate interference with key radio communications.....	78

Chapter 7

ICT Policy Directions	79
Section 1 Comprehensive Strategy Promotions	79
1. Promotion of National Strategy.....	79
2. Promotion of MIC's ICT Comprehensive Strategy.....	79
Section 2 Developments in Telecommunications Policy	80
1. Promotion of Fair Competition.....	80
2. Ensuring Safety and Reliability of Telecommunications Infrastructure.....	81
3. Proper Handling of Personal and User Information in Telecommunications Services.....	81
Section 3 Developments in Radio Policy	81
1. Promoting Effective Radio Spectrum Use.....	81
2. Radio Usage Advancement and Diversification Initiatives.....	82
3. Establishing Radio Usage Environments.....	82
Section 4 Developments in Broadcasting Policy	83
1. Encouraging Distribution of Broadcast Content.....	83
2. Advancements in Broadcast Services.....	83
3. Strengthening the Disaster Resilience of Broadcast Networks.....	83
4. Ensuring the Safety and Reliability of Broadcast Infrastructure.....	83
5. Various Issues concerning Broadcasting Policy.....	83
Section 5 Promoting ICT Use and Application	84
1. Promoting ICT Application in the Education, Medicine and Other Fields.....	84

2. Regional Development Using Information and Communications Infrastructure.....	84
3. Promoting Cybersecurity Policy.....	85
4. Establishing Barrier-free Information Environments.....	85
5. Developing ICT Personnel.....	86
6. Developing Cloud Services.....	86
7. Boosting Productivity with ICT.....	86
8. Promoting e-Government.....	87
Section 6 Promoting ICT Research and Development.....	87
1. Promoting Research and Development Strategies.....	87
2. Enhancing Research and Development to Realize Cutting-edge ICT in All Parts of Society	88
3. Assistance for Creating Innovation Using Competitive Funding.....	88
4. Research and Development Programs Promoting International Collaborations in the ICT Field.....	89
5. Contributions to More Resilient Public Infrastructure.....	89
6. Other Research and Development Programs.....	89
Section 7 Promoting International Strategies for ICT.....	89
1. Priority Promotion Themes for International Policy.....	89
2. Initiatives in International Frameworks.....	90
Section 8 Developments in Postal Service Administration.....	91
1. Promoting Postal Service Administration.....	91
2. Promoting Postal Service Administration in the International Field.....	91
3. Promoting the correspondence delivery business.....	91