

Major Issues of ICT Policy in Japan

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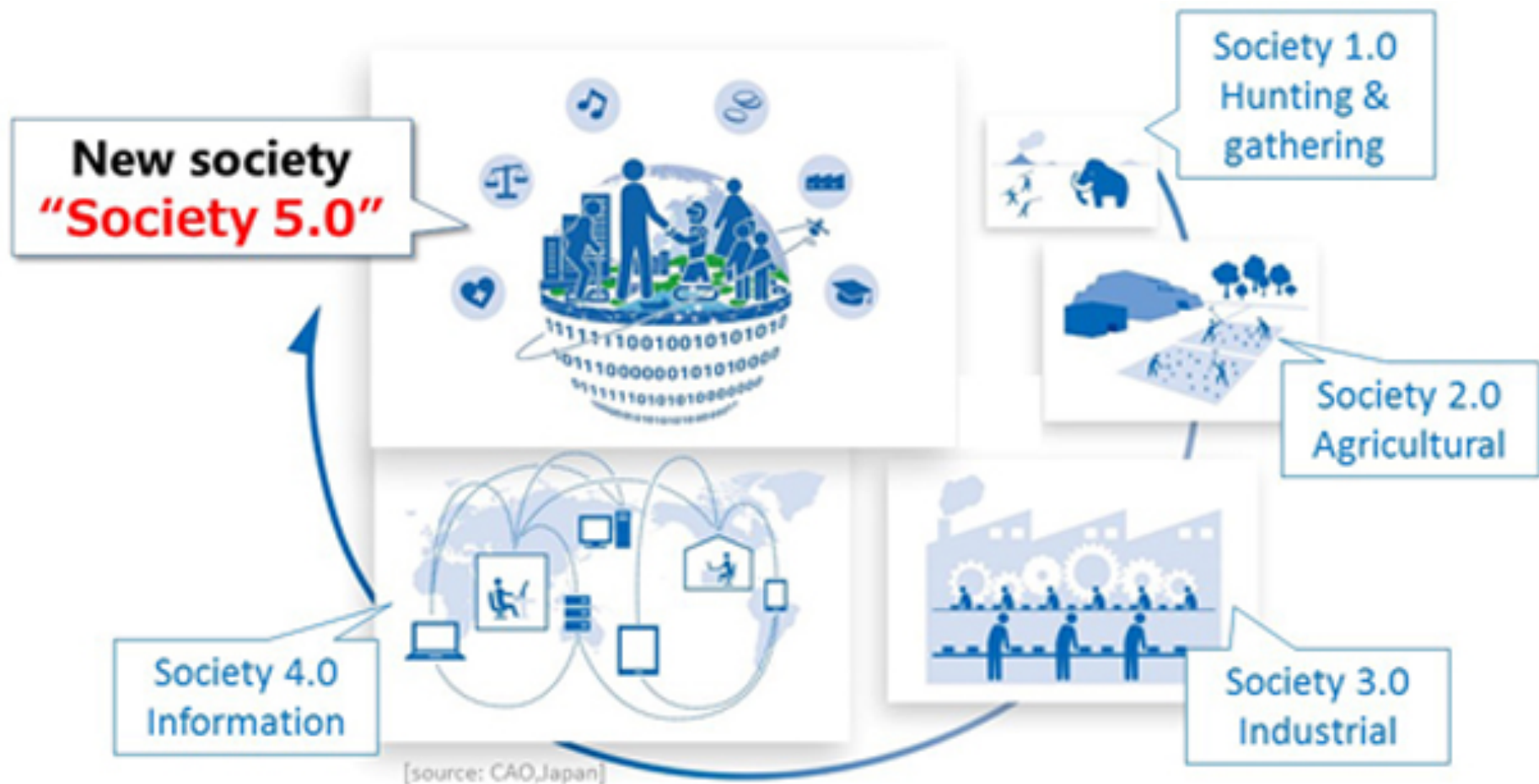
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Society 5.0 as a Target of the Future

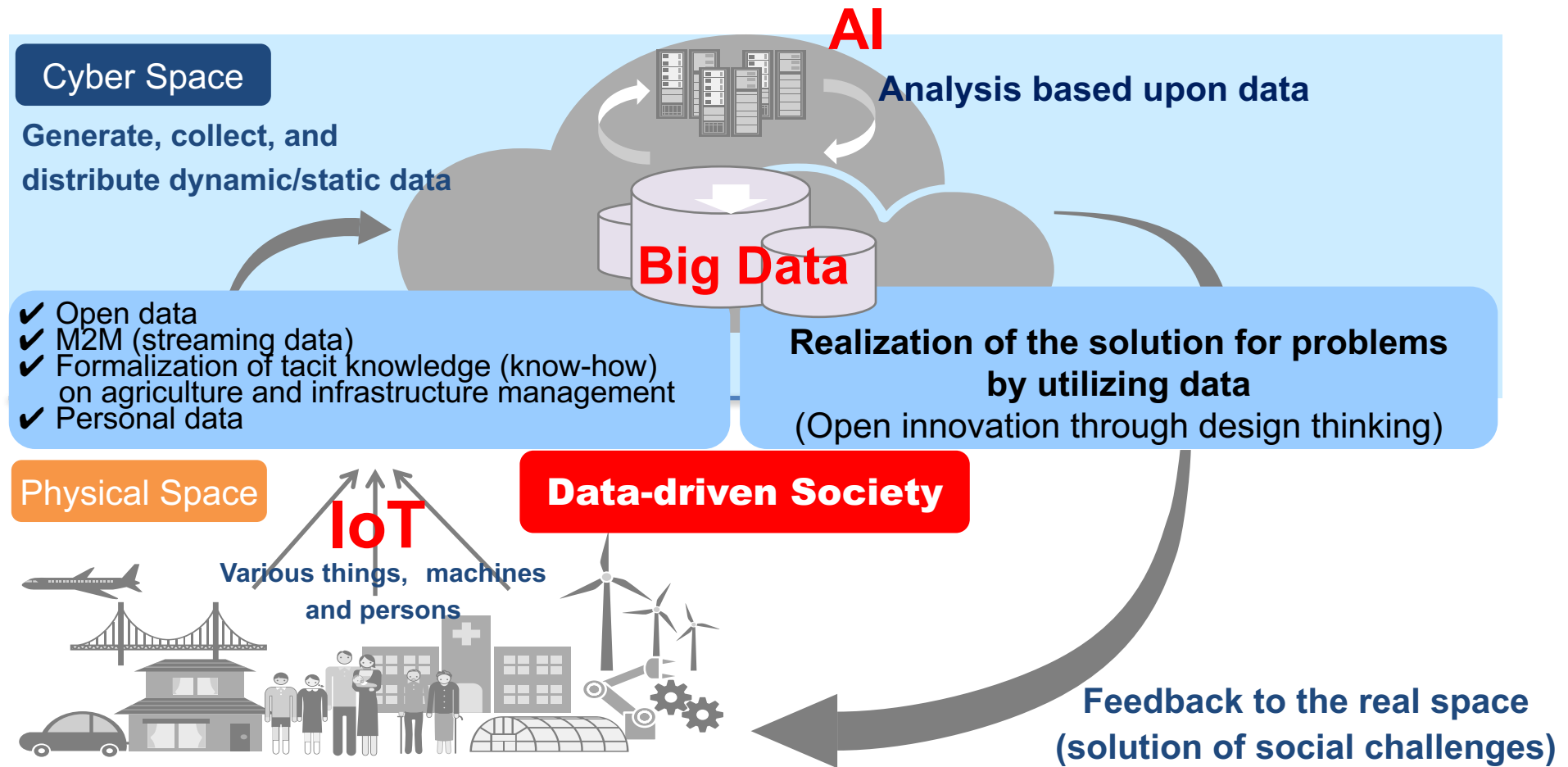
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- “Society 5.0” was proposed in the 5th Science & Technology Plan (2016-20).
- It is a human-centered society that balances economic advancement with the resolution of social problems by a system that highly integrates cyber space and physical space.

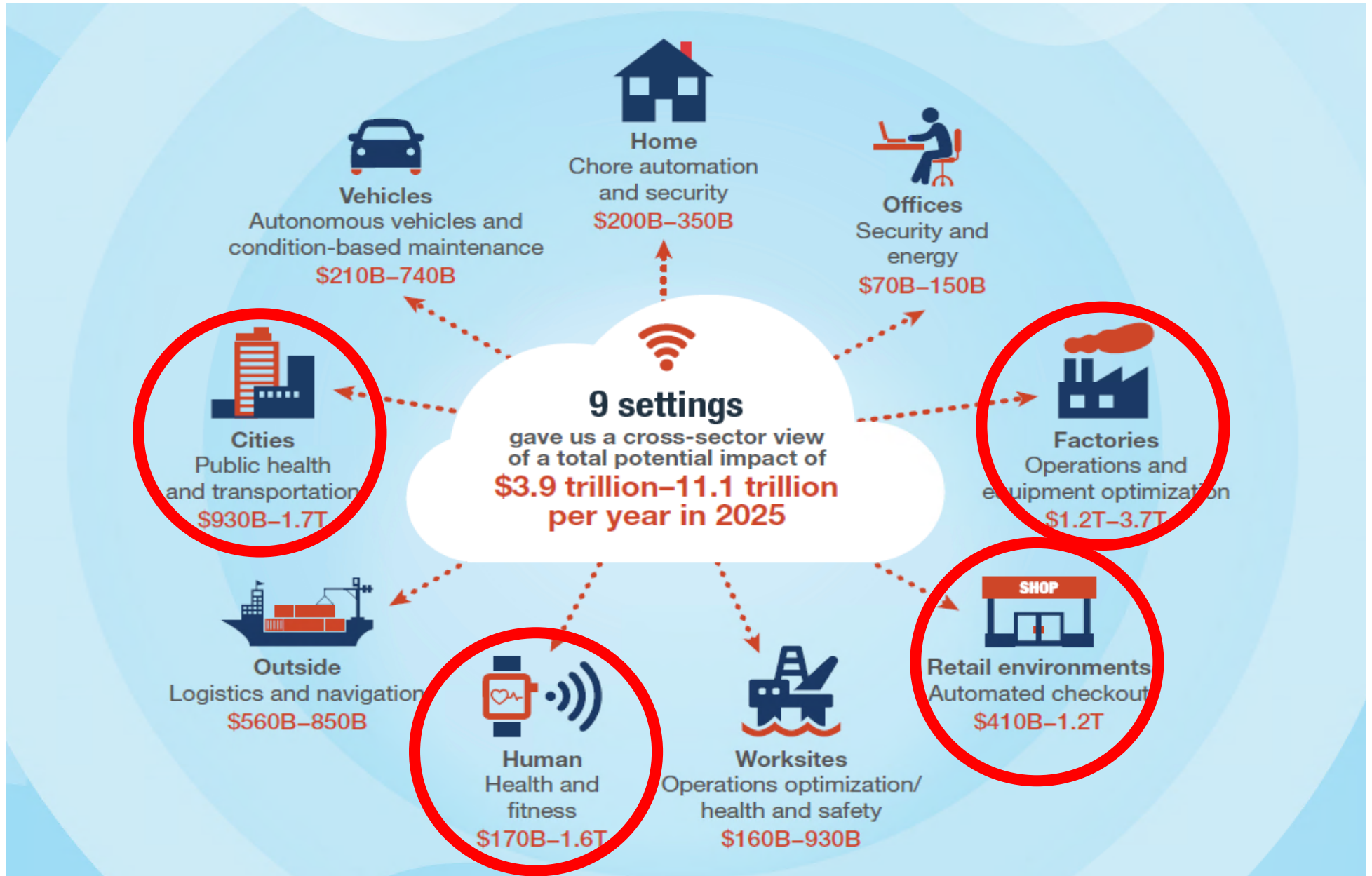


Data-driven Society as an Engine of Growth

Creates an added value of 267 bil US\$ by the realization of a data-driven “Society 5.0”
(Japan Revitalization Strategy Revision 2016 (the Cabinet’s decision of June 2016))
→ **Redesigning all socioeconomic activities to tackle social challenges.**



Where is the Value Potential of the IoT? (By McKinsey)



CES 2018 Technology Trends In Three Parts

Ingredient Technologies

5G
A.I.
Robotics

In The Market

Native Interfaces and
Digital Senses
Realism Redefined

Emerging Tech

Smart Cities
Sports Innovation
Digital Therapeutics

Technology Tipping Points We Will Reach by 2025

5

WEF announced a report in 2015, regarding “Technology Tipping Points by 2025.” It surveyed more than 800 executives and experts from the technology sector to share their respective timelines for when technologies would become mainstream.

✓ 10% of people wearing clothes connected to the internet 【91%】

✓ The first robotic pharmacist in the US 【87%】

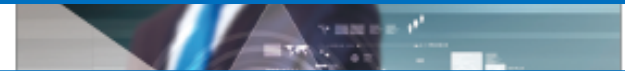
✓ The first 3D-printed car in production 【84%】

✓ The first implantable mobile phone available

Deep Shift
Technology Tipping Points

✓ The first 3D-printed car in production 【84%】

✓ Driverless cars equaling 10% of all cars on US roads 【78%】



✓ The first implantable mobile phone available commercially 【82%】

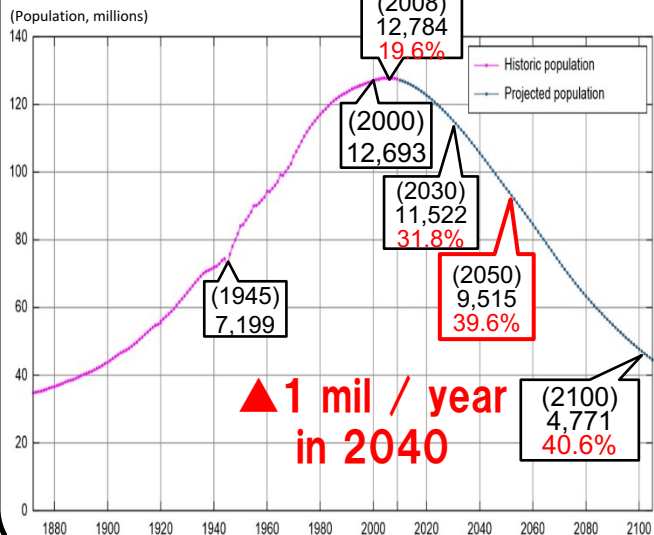
no traffic lights 【64%】

※【0%】 probability of realization by experts

【Population】

- Japan's population is decreasing after the peak of 128mil in 2008.
- In 2040, populations will be below 110mil and will fall by 1mil / year.

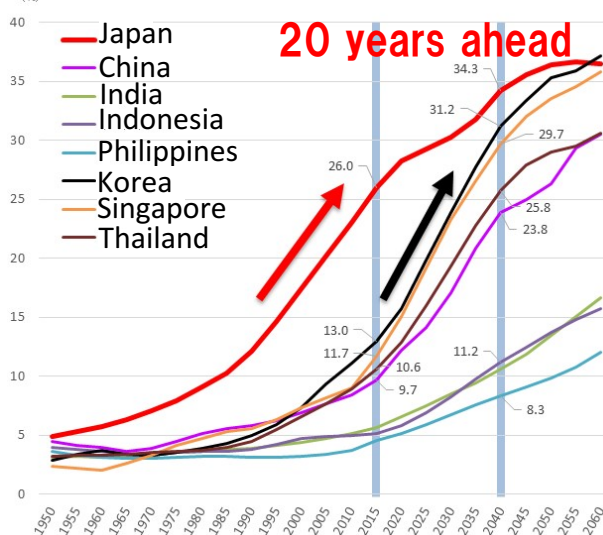
<transition of Japan's Population>



【Aging】

- The elderly population of Japan will reach the peak in 2042.
- Japan precedes other Asian countries about 20 years in the speed of aging.

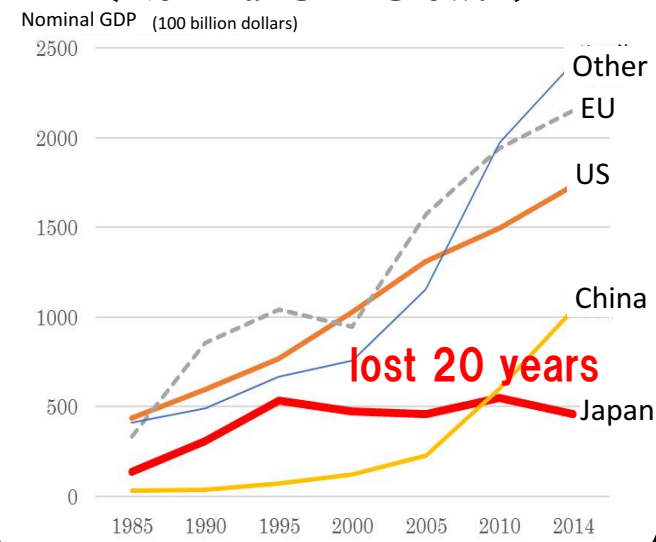
<Aging Rates of Asian Countries>



【Economy】

- Japan's GDP growth has struggled after the bubble economy.
- Moderate growth continued during the "lost 20 years" (1995-2015)

<Nominal GDP Growth>

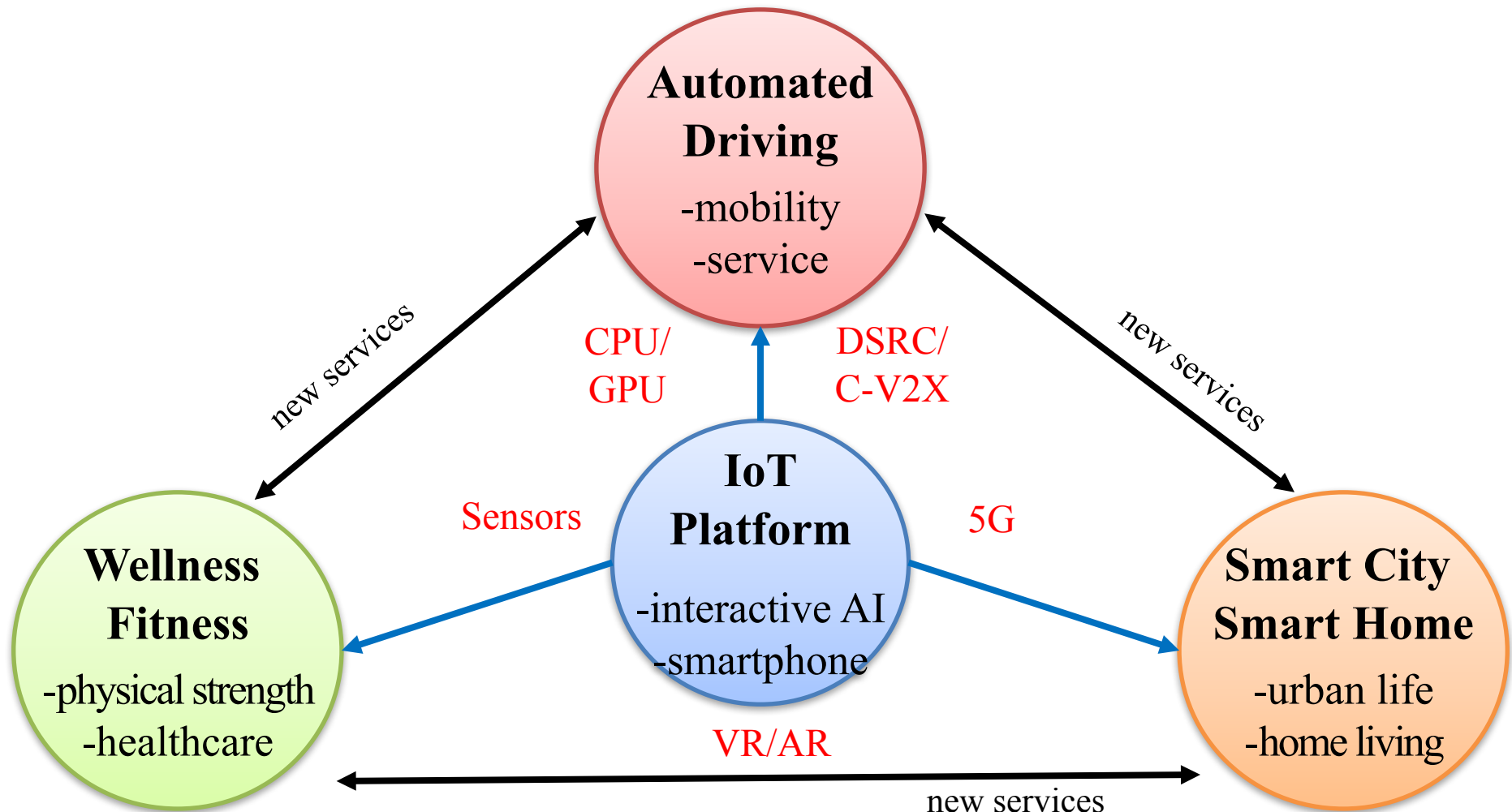


Accepting the structural change properly, Japan needs to seek for a sustainable growth model.

Examining a new vision of ICT policies toward 2030-2040 under the MIC's Council

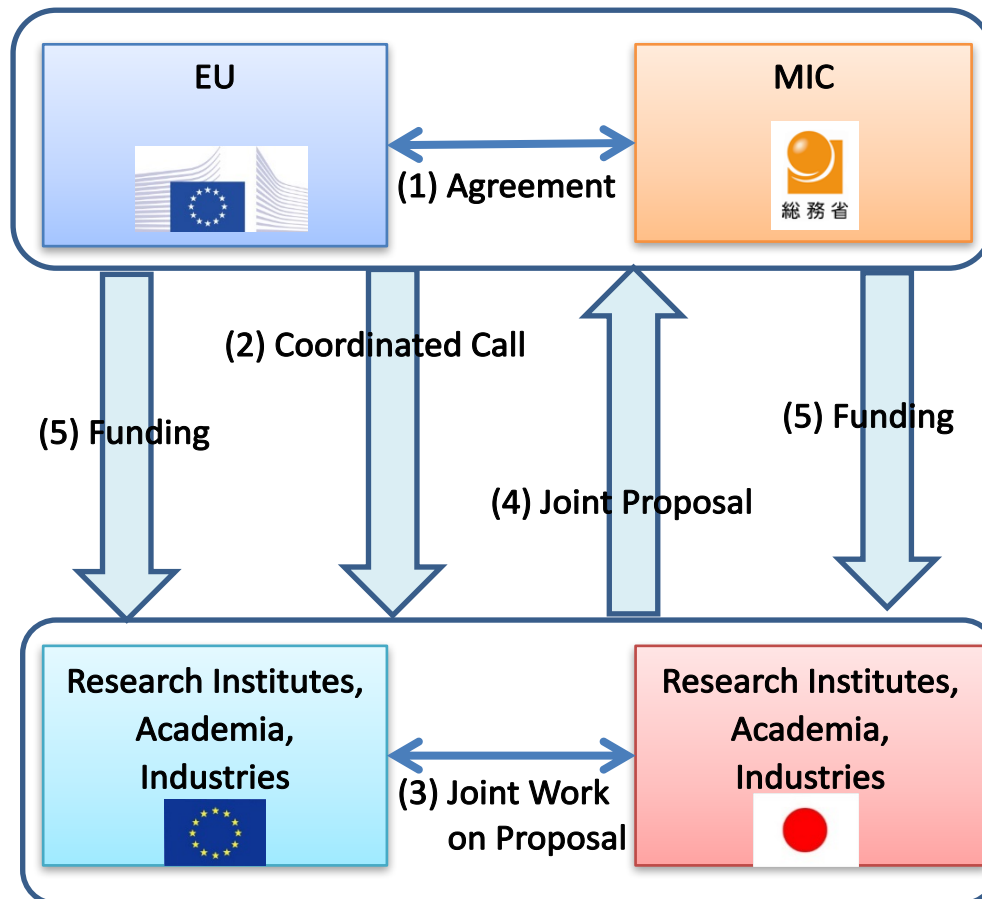
Markets Targeted under the Aging Society

- IoT platform such as interactive AI and smartphone will play as the core, and the peripheral technologies such as CPU/GPU, 5G, DSRC, VR/AR, sensors, will become important.
- Promising markets will be Automated Driving, Smart City/Smart Home, Wellness/Fitness, which have big business scales and contribute to solving social problems in cooperation with the public sector.



- For expanding research results, facilitating international standardization, innovation, and int'l competitiveness, EU and Japan have funded joint ICT R&D projects since 2013.
- Further measures will be expected to deepen Europe-Japan collaboration in the field of ICT.

EU-Japan Joint ICT R&D Program



R&D topics themed in past calls

- 5G (network management and radio)
- Robotics
- Big Data
- Cloud
- Cybersecurity
- Internet of Things
- Optical communications
- Wireless communications
- Testbeds
- Content centric network
- Photonic infrastructure