

## Section 4 Trends in broadcasting policy

### 1. Summary

#### (1) Initiatives so far

Broadcasting has played a role as a social capital, sharing essential societal information such as disaster and local news, and is the foundation of democracy.

The traditional analog television broadcasting was completely digitized by the end of March 2012, leading to advancements in broadcasting services such as high-definition images and data broadcasting. The MIC has been promoting 4K/8K broadcasting services to enhance the collaboration with broadcasters and manufacturers, disseminate information about 4K/8K satellite broadcasting reception methods and 4K/8K content, and certify operators providing 4K broadcasting. Efforts have also been made to promote the overseas expansion of broadcasting content in collaboration with relevant government agencies and organizations.

The overseas expansion of content can significantly enhance the appeal of Japan abroad, leading to an increase in inbound tourism and the expansion of exports of agricultural, forestry, and fishery products, as well as local products. The MIC has been promoting the overseas expansion of broadcast content in collaboration

with relevant ministries and agencies.

Furthermore, measures have been taken to strengthen the resilience of broadcasting networks with a focus on radio which is recognized to be useful in disasters, such as initiatives to address hearing impairments in radios, disaster prevention measures for transmission facilities, and promoting equal access to information through broadcasting. This includes providing subsidies for the production costs of subtitled programs, commentary programs, sign language programs, and the installation of captioning equipment for live broadcasting programs by private broadcasters, as well as setting dissemination targets for subtitled broadcast, etc. and establishing the “Guidelines for Information Accessibility in the Broadcasting Field”.

In addition, as it is important to have not only the existence of “Sender” of the broadcast program but also the “Receiver” of it, the MIC has been focusing on improving media literacy, particularly for elementary, junior high, and high school students, by providing educational materials and practical teaching packages.

#### (2) Future challenges and directions

The broadcasting environment is undergoing significant changes due to the widespread adoption of broadband, the growth of internet video streaming services, and the diversification of viewing devices. Viewers are increasingly obtaining information from the internet, leading to a potential long-term decline in terrestrial television advertising expenditure and accelerating the trend of viewers moving away from traditional television. Meanwhile, issues such as fake news in the online space have become apparent, highlighting the challenge of ensuring information health. In this context, broadcasting plays a crucial role in providing reliable information,

guaranteeing the “Freedom to Know”, sharing “Fundamental Societal Information”, and promoting mutual understanding of diverse values, and the expectations for its role have increased in the digital age.

In response to these changing circumstances, it is necessary to consider the future outlook of broadcasting and the system of broadcasting from a medium- to long-term perspective, as well as address challenges such as strengthening the foundation of broadcasting business, promoting the distribution of broadcasting content, and enhancing the resilience and disaster resistance of broadcasting networks.

## 2. Examination of future vision of broadcasting institution in the digital age

The MIC has been holding the “Study Group on the Future of Broadcasting Systems in the Digital Age” (hereinafter referred to as the “Broadcasting System Study Group”) since November 2021, in order to examine the future vision of broadcasting and the ideal state of broadcasting systems from a medium- to long-term perspective, amidst the rapid advancement of digitalization across society.

In the “Summary of the Future Vision and Ideal State of Broadcasting in the Digital Age” (hereinafter referred to as the “First Summary”), published by the Broadcasting System Study Group in August 2022, the results of the examination were compiled based on the perspective of what measures should be taken for broadcasting to continue meeting the expectations of viewers regarding its social role, even as the information space expands beyond broadcasting to include the internet<sup>1</sup>. Based on the First Summary, the MIC revised ministerial ordinances to relax the principle of excluding concentration of mass media ownership<sup>2,3</sup>, and also enacted partial amendments to the Broadcasting Act and the Radio Act (Act No. 40 of 2023), which include measures such as enabling multiple specified basic terrestrial broadcasters to jointly use relay station equipment in a single broadcasting region.

Regarding the joint use of relay station equipment, efforts are being made towards its realization, including the establishment of a national council in December 2023, as well as the formation of regional councils across the country. These efforts focus on creating a roadmap for the realization of joint use, defining the roles and responsibilities of stakeholders, and formulating and implementing relay station renewal plans in each region.

Furthermore, in October 2023, the Broadcasting System Study Group published the “Summary of the Future Vision and Ideal State of Broadcasting in the Digital Age (Second Summary)” (hereinafter referred to as the “Second Summary”). The Second Summary includes recommendations on issues such as “Satellite Broadcasting and Cable Television,” “Effective Use of Frequencies for Broadcasting,” “Ensuring the Truthfulness of Broadcasting,” and “Information Disclosure by Private Operators.” Additionally, it presents the results of specialized examinations on the following topics: (1) the potential for small relay stations to be replaced by broadband (cable TV, optical fiber, etc.); (2) the ideal state of NHK’s internet distribution; (3) measures to promote the production and distribution of broadcasting content; and (4) NHK’s role as a “platform related to the broadcasting industry.”<sup>4</sup>

## 3. Future vision of public broadcasting

In the MIC, based on the First Summary of Broadcasting System Study Group, a “Public Broadcasting Working Group” has been held under the Broadcast System Review Committee since September 2022, to consider the manner of NHK’s internet distribution. In the two subsequent “Summaries” released in October 2023 and February 2024<sup>5</sup>, it was concluded that, under the dual broadcasting system framework, NHK should generally make all broadcasts available for internet distribution to fulfill its role of providing broadcast programs to viewers via the internet.

Based on the conclusions of these summaries, a law amending part of the Broadcasting Act was enacted in May 2024 (Act No. 36 of 2024), which adds the distribution of NHK’s broadcast programs and program-related information to essential operations of NHK, and strengthens NHK’s obligation to cooperate with measures taken by private broadcasters to eliminate poor

broadcast reception, such as the joint use of relay stations (referred to as the “Amendment Broadcasting Act”).

Furthermore, the Amendment Broadcasting Act establishes a mechanism for NHK to independently establish its own operating rules for the distribution of program-related information via the internet<sup>6</sup>, ensuring that its content conforms to the requirement of ensuring there is not hindrance to fair competition. To ensure the smooth functioning of the framework for competition assessment, the MIC has been conducting discussions on the framework for competition assessment and related matters since November 2023 through the “Preparatory Meeting on Competition Assessment of the Japan Broadcasting Corporation’s Internet Utilization Operations.”

The MIC will continue to consider the manner in which public broadcasting should respond to the demands of the times.

<sup>1</sup> “Summary of the Future Vision of Broadcasting and the Ideal Broadcasting System in the Digital Age” (August 5, 2022) [https://www.soumu.go.jp/menu\\_news/s-news/01ryutsu07\\_02000236.html](https://www.soumu.go.jp/menu_news/s-news/01ryutsu07_02000236.html)

<sup>2</sup> The Principles aim to ensure that the opportunity to broadcast is secured for as many individuals as possible, thereby allowing the freedom of expression through broadcasting to be enjoyed by a broader audience. To achieve this, the number of key broadcasting stations that can be owned or controlled by a single entity is restricted.

<sup>3</sup> An ordinance amending some provisions of the Ministry of Internal Affairs and Communications Ordinance regarding the definition of specific officers and control relationships related to basic broadcasting operations and exceptions to the standards for the enjoyment of freedom of expression. (Ministry of Internal Affairs and Communications Ordinance No. 13 of 2023)

<sup>4</sup> “Summary of the Future Vision of Broadcasting and the Ideal Broadcasting System in the Digital Age (Second summary)” (October 18, 2023): [https://www.soumu.go.jp/menu\\_news/s-news/01ryutsu07\\_02000269.html](https://www.soumu.go.jp/menu_news/s-news/01ryutsu07_02000269.html)

<sup>5</sup> “Summary of Public Broadcasting Working Group” (October 18, 2023): [https://www.soumu.go.jp/main\\_content/000907572.pdf](https://www.soumu.go.jp/main_content/000907572.pdf) “Summary of Public Broadcasting Working Group (Second Summary)” (February 28, 2024): [https://www.soumu.go.jp/main\\_content/000931107](https://www.soumu.go.jp/main_content/000931107)

<sup>6</sup> Information that is closely related to the content of broadcast programs that NHK broadcasts or has broadcasted, and is composed of materials necessary for the editing of the broadcast program (excluding the broadcast program itself, but including edited versions of the broadcast program).

## 4. Strengthening of the foundation of broadcasting businesses

### (1) Efforts related to AM radio broadcasting

Many of the AM transmission facilities used by private AM radio broadcasters have been in place for over 50 years and are in a state of severe deterioration. Amidst this situation, private AM radio broadcasters are facing cost burdens associated with both AM and FM facilities due to the introduction of FM complementary broadcasting, which was implemented to resolve poor AM radio reception. Additionally, with a declining trend in business revenue, the cost of updating AM radio broadcasting facilities has become a management issue.

Given these challenging business conditions, the MIC has established special measures to allow private AM radio broadcasters to suspend AM station operations for a period of more than six months. This is to assess the

impact if broadcasters decide, as a management decision, to switch from AM to FM broadcasting (switching to FM) or to discontinue AM relay stations without switching to FM. The MIC published the “Basic Policy on Special Measures Concerning the Suspension of AM Station Operations (March 2023)” outlining the content, requirements, and procedures for these special measures. During the simultaneous re-licensing of broadcasters in November 2023, applications for these special measures were accepted, and for AM stations where the application was approved, operations have been sequentially suspended from February 2024. The MIC plans to evaluate the impact on residents and local governments based on the results of these suspensions.

### (2) Addressing issues in satellite broadcasting

#### A Examination of the future of sustainable satellite broadcasting

Based on the Second Summary published in October 2023, the MIC established a new “Working Group on Satellite Broadcasting” under the Broadcasting System Review Committee in November 2023. This was done to address issues in satellite broadcasting and to envision a sustainable future for satellite broadcasting amidst changing environmental conditions.

The “Working Group on Satellite Broadcasting” is

conducting specific and specialized discussions on topics such as “reducing infrastructure costs related to satellite broadcasting,” “utilizing satellite broadcasting as an alternative to terrestrial broadcasting,” “effective use of the dextrorotation bandwidth,” “handling of shopping programs in the approval of basic satellite broadcasting,” and “utilization of satellite broadcasting during disasters.”

#### B Efforts to promote 4K8K satellite broadcasting

Regarding 4K8K satellite broadcasting, which began on BS broadcasting and 110-degree east longitude CS broadcasting in December 2018, the MIC recognized three new basic satellite broadcasters to conduct 4K broadcasting in the dextrorotation bandwidth of BS broadcasting in November 2023, as part of efforts to expand this service.

Additionally, the cumulative shipment of receivers capable of viewing 4K8K satellite broadcasting reached approximately 19.21 million units by the end of March 2024. The MIC, in collaboration with broadcasters, manufacturers, and related organizations, is working to fur-

ther promote the appeal of ultra-high-definition video, which is a characteristic of 4K8K satellite broadcasting, and to improve the reception environment.

Moving forward, through discussions on the effective use of the dextrorotation bandwidth (promotion of 4K broadcasting) within the “Working Group on Satellite Broadcasting,” the MIC will consider the effective use of bandwidth to enhance 4K broadcasting, keeping in mind the need to accommodate advanced video encoding methods. The MIC will continue to work towards further expansion and promotion of 4K8K satellite broadcasting.

## 5. Promotion of the production and distribution of broadcasting contents

### (1) Promotion of production and distribution of broadcasting content

#### A Initiatives for effective online distribution of broadcasting content

In the First Summary of the Broadcasting System Study Group, it was mentioned that it is important to reduce the equipment burden on broadcasters, including local stations, and to create an environment where they can focus on content production.

From the perspective of creating such an environment, it is considered important not only to promote the production of content by broadcasters but also to further promote the distribution of such content on both broadcasting and the internet so that it can be viewed more widely. In particular, local broadcasters are expected to play a significant role in disseminating regional information in the future.

As the environment surrounding broadcasting changes, including the growth of internet video distribution services and the diversification of viewing styles, it is considered important for Japanese broadcast content to be widely distributed both domestically and internationally by promoting the use of various platforms on the Internet, not just broadcast waves, in order to continue fulfilling the role of broadcasting as a social infrastructure.

Under this concept, the “Working Group on the Promotion of Production and Distribution of Broadcasting Content” has been held since December 2022 under the Broadcasting System Study Group to discuss ways to promote the production and distribution of broadcast

content in the internet age, with the cooperation of relevant businesses.

In the First Summary of the review, it was concluded that “to realize an environment where viewers can easily watch broadcast content via the internet at an early stage, it is necessary to ensure the proper guidance from a virtual platform that secures the list of broadcast content distributed by multiple internet distribution platforms on TV receivers connected to the internet. From the perspective of viewer convenience, it is necessary for the

public and private sectors to work together to examine and verify the display and operability that allows viewers to easily watch broadcast content within a framework of cooperation among broadcasters and various stakeholders. In doing so, attention should be paid to the viewer’s perspective (viewing habits, ways of viewing, and understanding of the above initiatives), and consideration should be given to creating a mechanism that makes it easy for local viewers to access broadcast content such as regional information provided by local stations”

#### **B Utilization of viewing data in the broadcasting field and privacy protection**

By collecting and analyzing viewing histories of broadcast programs from TV receivers connected to the internet, for example, it is possible to effectively utilize this data for program production that caters to the detailed viewing needs of viewers in each region and for providing disaster information. However, there is also the issue that it is technically possible to infer sensitive personal information such as individual viewers’ political beliefs or medical histories.

The MIC has established specific rules for the broadcasting field that all those handling personal information of broadcast receivers must comply with, in addition to the minimum rules under personal information protection laws that apply to browsing histories on video-sharing sites, considering the public nature of broadcasting.

These rules are set out in the “Guidelines on Personal Information Protection of Broadcast Recipients etc.,” which have been revised multiple times (the most recent revision was based on the enforcement of the revised Enforcement Rules for the Act on the Protection of Personal Information in April 2024). Additionally, since April 2021, the “Study Group on the Utilization of Viewing Data in the Broadcasting Field and the Ideal State of Privacy Protection” has been held to discuss the rules for handling viewing histories collected in connection with broadcasting, as well as the rules for handling distribution histories in the online distribution of broadcast content, from the perspective of forming balanced rules between data utilization and privacy protection.

#### **C Facilitation of rights processing for simultaneous distribution of broadcasting programs**

Considering the changes in viewing environments due to the spread of smart devices, broadcasters are advancing efforts for simultaneous distribution of broadcasting programs on the Internet (including simultaneous distribution, catch-up distribution, and missed distribution. The same as below.). This initiative expands opportunities to view high-quality content and is important from the perspective of improving viewer convenience, promoting the content industry, and ensuring international competitiveness. However, broadcast programs use a diverse and large number of copyrighted works, and there are challenges in rights processing, such as the inability to process copyrights for simultaneous distribution, leading to “blackouts.” To promote simultaneous distribution, it was

necessary to create an environment where copyrighted works could be used more quickly and smoothly.

Therefore, the MIC, in cooperation with the Agency for Cultural Affairs, which oversees the Copyright Act, gathered opinions from stakeholders and examined the direction of system reforms. As a result, the Act to Partially Amend the Copyright Act (Act No. 52 of 2021) was enacted in the regular session of the Diet in 2021, and measures to facilitate rights processing were implemented. Following the amendment, simultaneous distribution by all five commercial broadcasting networks was realized in April 2022, and further examination is being conducted to facilitate rights processing while monitoring trends in simultaneous distribution.

#### **D Promotion of proper production transactions for broadcasting content**

The MIC has been holding the “Study Group on Verification and Review on Promotion of Production and Trade of Broadcast Content,” composed of experts, to improve the production environment and enhance production motivation in the broadcast content field. Based on discussions at the meeting, the “Guidelines for Regulation on Production and Trade of Broadcast Content” (7th edition) (hereafter referred to as “Guidelines”) were formulated to encourage broadcasters and program production companies to promote proper production transactions.

Specifically, regular surveys are conducted to under-

stand the status of production transactions for broadcast content, and hearings are held with broadcasters and program production companies to understand the status of compliance with the Guidelines. Guidance is provided based on the Article 4 of the Act on the Promotion of Subcontracting Small and Medium-sized Enterprises (Act No. 145 of 1970) for identified issues, and training sessions are held to raise awareness of the guidelines. Additionally, a hotline for free legal consultation with lawyers on specific production transaction issues, the “Legal Consultation Hotline for Transaction of Produced Broadcast Content,” has been established.

#### **(2) Overseas expansion of broadcasting content**

With the growth of video distribution services, the

cross-border distribution of content is progressing, and



the presence of foreign content is increasing in Japan. In this context, for the Japanese content industry to develop, it is necessary to produce high-quality content with a global perspective and actively promote overseas expansion to capture the growth of expanding markets.

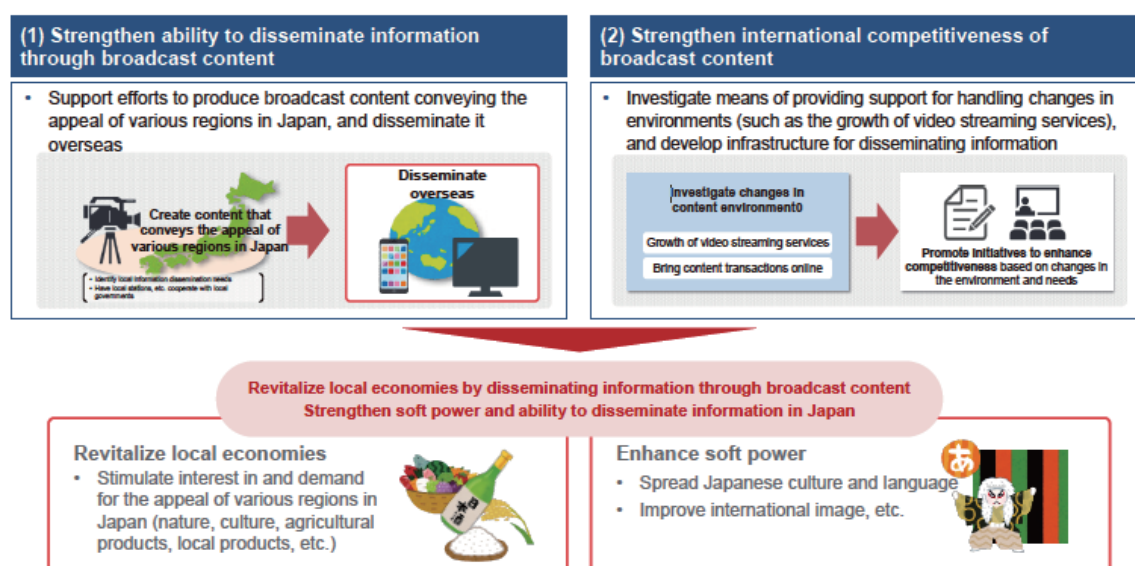
Moreover, the overseas expansion of content helps convey the appeal of Japan to the world, increasing interest in Japan's nature and culture, leading to economic effects such as an increase in foreign tourists visiting Japan and the expansion of sales channels for agricultural, forestry, and fishery products and local products. It also contributes to improving Japan's image and strengthening soft power, making it extremely important from a diplomatic perspective.

The MIC, in collaboration with the "Broadcast Program Export Association of Japan" (BEAJ) and related ministries and agencies, continuously supports initiatives where Japanese broadcasters and others collabo-

rate with local governments to produce broadcast content that conveys the appeal of Japanese regions and disseminate it through overseas broadcasters. Additionally, at international content trade fairs such as MIP-COM (Cannes, France) and TIFFCOM (Tokyo) in October 2023, and ATF (Singapore) in December 2023, PR activities such as seminars were conducted in collaboration with the public and private sectors to widely promote Japanese content overseas. From FY2023, an online common platform has been established and is being operated and improved to disseminate information on Japanese broadcast content to overseas businesses, in collaboration with broadcasters and production companies actively engaged in overseas expansion.

Including these initiatives, the goal is to increase overseas sales by 1.5 times (compared to FY2020) by FY2025, and efforts to promote the overseas expansion of content will continue (Figure 2-2-4-1).

Figure 2-2-4-1 Promotion of overseas expansion of broadcasting contents



## 6. Promotion of broadcasts for people with the audiovisual disabilities

To enable people with audiovisual disabilities, etc. to smoothly access information through television broadcasts, the MIC established the "Guidelines for Information Accessibility in the Broadcasting Field" in February 2018. These guidelines set dissemination targets for subtitled broadcasts, commentary broadcasts, and sign language broadcasts, encouraging voluntary efforts by broadcasters. Additionally, since November 2022, the "Study Group on Enhancing Broadcasting for People with Audiovisual Disabilities, etc.," composed of experts, disability organizations, and broadcasters, has been discussing policies to enhance broadcasting for people with audiovisual disabilities, etc. This includes reviewing the guidelines based on recent achievements in subtitled broadcasts and technological trends. A report was compiled in August 2023, and the guidelines

were revised in October 2023 based on this report. Currently, broadcasters are advancing their efforts in accordance with these guidelines.

Furthermore, under the Act on Advancement of Facilitation Program for Disabled Persons' Use of Telecommunications and Broadcasting Services, with a View to Enhance Convenience of Disabled Persons (Act No. 54 of 1993), subsidies are provided for the production costs of subtitled programs, commentary programs, and sign language programs. Given that live broadcasts require significant manpower and costs, as well as specialized skills, since FY2020, subsidies have also been provided for the costs of equipment necessary for adding subtitles to live broadcasts, including systems utilizing cutting-edge ICT.

## 7. Improvement to the resilience of broadcasting networks and enhancement of disaster resistance

### (1) Optical fiber installation for cable networks

The MIC is implementing the “Disaster Resilience Enhancement Project through Optical Fiber Installation for Cable Television Networks and Remote Area Shared Viewing Facilities” in the supplementary budget for the FY2023 and the initial budget for FY2024, with the aim of ensuring reliable and stable information transmission through broadcasting during disasters (**Figure 2-2-4-2**). From the supplementary budget for the FY2023, measures have been taken to relax the financial strength index requirements and to provide support for cable television operators to expand the service areas of

shared viewing facilities and to independently install optical fiber for shared viewing facilities. Additionally, provisions have been made to support “Successor Operators,” which are private entities, in the event they receive the transfer of already optically-fibered cable television networks owned by municipalities for maintenance. Furthermore, support has been provided for the restoration of cable television networks affected by the 2024 Noto Peninsula Earthquake, including raising the subsidy rate for disaster recovery efforts.

**Figure 2-2-4-2 Disaster Resilience Enhancement Project through Optical Fiber Installation for Cable Television Networks and Remote Area Shared Viewing Facilities**

#### Project illustration

##### ○ Project operator

Municipalities, municipality collaboration entities or a third sector (including entities that continue to fulfill the role pertaining to the provision of cable television services through transfer of the relevant facilities from these entities (Succeeding business operators))

##### ○ Target regions

Regions satisfying all of (1) to (3) below:

- (1) Municipalities where cable television is positioned in their regional disaster prevention plan
- (2) Regions with unfavorable conditions
- (3) Municipalities with financial index 0.8 or lower and other regions where the subsidy is found particularly necessary

##### ○ Subsidy rate

(1) Municipalities or municipality collaboration entities (Succeeding business operators): 1/2

\* Municipalities with financial index over 0.5 and less than 0.8: 1/3

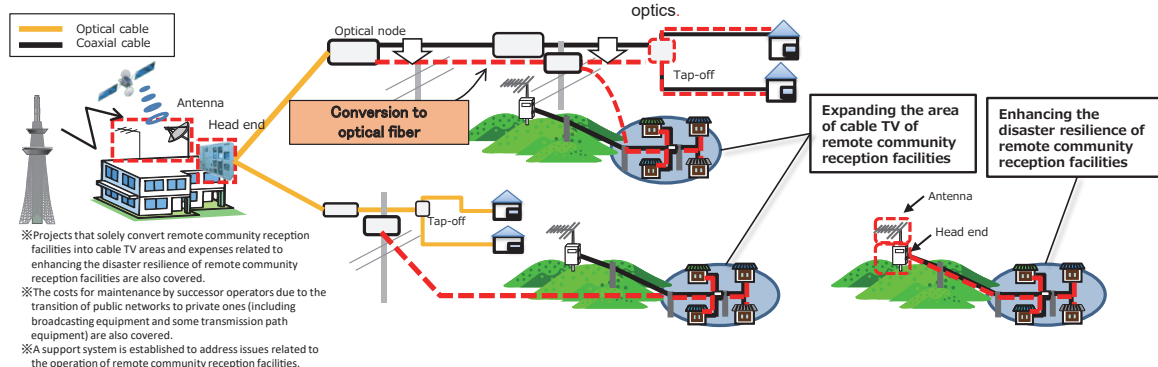
\* The case of succeeding business operators associated with privatization of publicly established network which was converted to optical cables,

(2) Third sector (Succeeding business operators): 1/3

##### ○ Subsidized costs (shown in red in the figure below)

Optical fiber cable, transmitting/receiving facilities, antennas, etc.

\*Includes transmission line equipment necessary for converting remote communal reception facilities (coaxial cable) into cable television areas implemented simultaneously with the switch to fiber optics.



### (2) Support for initiatives by broadcasters

The MIC is implementing the “Broadcast Network Development Support Project (Basic Terrestrial Broadcasting Network Development Project and Regional Cable Television Network Development Project)” (**Figure 2-2-4-3**) and the “Support Project for the Elimination of Difficulties to Listen to Radio in Commercial Radio

Broadcasting” as well as the “Disaster Resilience Enhancement Support Project for Basic Terrestrial Broadcasting, etc.” in the initial budget for FY2024 to support initiatives by broadcasters and local governments aimed at strengthening broadcast networks.

Figure 2-2-4-3 Broadcast Network Development Support Project

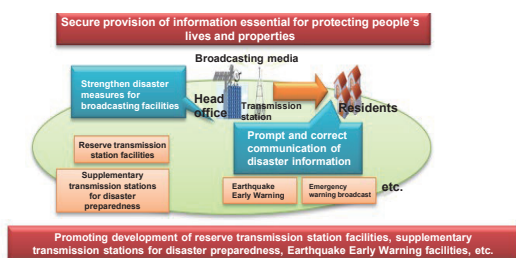
- In order to reliably provide disaster information, evacuation information, and other information essential for protecting the lives and property of citizens, the projects to support broadcast network development provide partial subsidies for the following maintenance costs, in order to bring resilience to the broadcast networks that serve as important means of transmitting information locally in the event of a disaster.
  - [1] Emergency earthquake early warning equipment, such as spare transmitting station equipment and supplementary disaster response transmitting stations involved in new radio and television development
  - [2] Doubling routes for cable television trunk lines

## Subsidy rate

- Local governments (\*) : 1/2
  - Third sector(\*), commercial broadcasters, (item [1] only): 1/3
- \*Item [2] also includes entities that continue to fulfill the role pertaining to the provision of cable television services through transfer of the relevant facilities from these entities (succeeding business operators).

## Project name/image

## [1] Project to develop basic terrestrial broadcasting networks



## [2] Project to develop regional cable television networks

