Section 4 Developments in broadcasting policy

1. Summary

(1) Past initiatives

Broadcasting, a foundation of democracy, has served as social capital for sharing basic social knowledge such as disaster and community information.

Television broadcasting, previously only available in analog form, was fully digitalized at the end of March 2012, and further advances in broadcasting services such as high-definition video images and data broadcasting have since been made. In the interest of promoting 4K/8K broadcasting services with higher resolution and image quality than HDTV, MIC has teamed up with broadcasters, manufacturers, etc., to disseminate information and raise awareness of how to access 4K/8K satellite broadcasting and 4K/8K content, as well as to certify 4K broadcasting operators and make other efforts needed to ensure that as many people in Japan as possible can enjoy the dynamic and powerful images available with 4K and 8K broadcasting.

Applying the lessons learned from January 2024 earthquake in the Noto region of Ishikawa Prefecture in January 2024 and the September 2024 torrential rainfall on the Noto Peninsula to ensure that the public receives necessary disaster and evacuation information, MIC has been engaged in efforts aimed at helping make broadcast networks more robust and disaster-resistant, including projects to restore transmission station facilities for terrestrial key broadcasting damaged in serious disasters, as well as implementing seismic countermeasures. Furthermore, MIC has been promoting the spread of broadcasting for persons with visual and hearing impairments by, for instance, providing subsidies to broadcasters for the production of subtitled programs, commentary programs, sign language programs, etc., and for the maintenance of equipment to provide subtitles for live broadcast programs, and formulating "Guidelines for Information Accessibility in the Broadcasting Field" that set targets for the dissemination of subtitled broadcasts, etc., to achieve equal-opportunity access to information through broadcasting.

In addition, it is important to have "receivers" as well as "transmitters" of broadcast programs, so MIC is working to improve literacy in broadcast media, especially for elementary, junior high, and high school students, and is providing educational materials and classroom practice packages for teachers.

(2) Future issues and directions

The environment surrounding broadcasting is changing dramatically, as viewers' viewing styles change and they increasingly move away from television with the spread of broadband, the growth of Internet video distribution services, and the diversification of viewing devices. Viewers increasingly obtain information not only from broadcasts but also from the Internet, and advertising expenditures for terrestrial television broadcasting may continue to decline in the long term, forcing structural changes. On the other hand, problems involving dis-/mis-information have emerged in the Internet space, and ensuring the soundness of information spaces has become an issue. Broadcasting plays a role in disseminating reliable information, fulfilling people's right to know, sharing basic social information, and promoting mutual understanding of diverse values, so it is precisely in this digital age that expectations of its role are on the rise.

In responding to these changing circumstances, it is necessary to envision the future of broadcasting and broadcasting systems from a medium- to long-term perspective, and to address such issues as reinforcing the foundations of the broadcasting business, promoting the distribution of broadcasting content, and enhancing the robustness and disaster resistance of broadcast networks.

2. Examining the state of broadcasting systems in the digital age

MIC has been convening the "Study Group on the Broadcasting System 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 digitization across society.

The Broadcasting System Study Group published the "Report on the Future Vision and Ideal System of Broadcasting in the Digital Age" (hereinafter, the "First Report") in August 2022[1], and the "Second Report on the Future Vision and Ideal Systems of Broadcasting in the Digital Age" (hereinafter, the "Second Report") in October 2023[2]. Based on the First Report, MIC has re-

[1] "Report on the Future Vision and Ideal System of Broadcasting in the Digital Age" (August 5, 2022): https://www.soumu.go.jp/menu_news/s-news/01ryutsu07_02000236.html
[2] "Second Report on the Future Vision and Ideal System of Broadcasting in the Digital Age" (October 18, 2023): https://www.soumu.go.jp/menu_news/s-news/01ryutsu07_02000269.html

vised ministerial ordinances[3] to relax the principle of excluding concentration of mass media ownership[4] , and also enacted partial amendments to the Revised Act[5], which include measures such as enabling multiple specified basic terrestrial broadcasters to jointly use relay station equipment in a single broadcasting region.

To improve the management efficiency of specified key terrestrial broadcasting service providers, a national council on the joint use of relay station equipment was established in December 2023 and regional councils were set up throughout Japan by May 2024 to consider three matters: creating a roadmap for joint use, defining the roles of related parties, and formulating/implementing regional plans for upgrading relay stations. In December 2024, Japan Broadcast Network (hereinafter, "JBN"), a joint use preparatory company, was established with investment from NHK. JBN is studying business plans and other measures to realize the joint use of terrestrial relay stations.

The "Working Group on Public Broadcasting" was convened under the Broadcasting System Study Group to study NHK's approaches to Internet streaming, etc., and, following the two reports[6] released in October 2023 and February 2024, the "Act for Partial Amendment of the Broadcasting Act" (Act No. 36 of 2024) enacted in May 2024 (hereinafter, the "Revised Broadcasting Act") stipulated that the streaming of broadcast programs via the Internet is an essential part of NHK's business. Under the Revised Broadcasting Act, NHK is required to establish its own operational rules to distribute program-related information[7] via the Internet at its own discretion and responsibility, while MIC is required to hear the opinions of academic experts and interested parties on these rules and to confirm that the rules are in conformity with the requirements set out to ensure fair competition[8].

The Broadcasting System Study Group subsequently published the "Third Report on the Future Vision and Ideal System of Broadcasting in the Digital Age" (hereinafter, the "Third Report") in December 2024. The Third Report summarizes the results of studies on the future of broadcasting, systems for replacing small relay stations, etc., with broadband or other measures (cable TV, streaming services, etc.), and management options for radio broadcasting, as well as the findings of specialized studies on (1) the feasibility of replacing small relay stations with broadband, (2) the future of NHK's international broadcasting, (3) measures necessary to promote the production and distribution of broadcasting content, and (4) the reduction of infrastructure costs for satellite broadcasting[9].

Based on the Third Report, MIC submitted to the 217th (regular) session of the Diet in 2025 the "Act for Partial Amendment of the Radio Act and the Broadcasting Act" that would oblige key terrestrial broadcasting service providers to take steps to ensure that their broadcast programs can continue to be viewed through cable TV or distribution services if relay stations are inevitably abolished, and this bill was passed into law in April 2025 (Act No. 27 of 2025).

Disasters in Japan have also become more severe and frequent in recent years, and there are concerns about potential large-scale disasters in the near future, including Nankai Trough earthquakes and other wide-area large-scale disasters such as Japan Trench and Chishima Trench earthquakes, as evidenced by the issuance of the first "Nankai Trough Earthquake Extra Information (Megathrust earthquake attention)" in August 2024. Given these circumstances, a new "Review Team to Enhance and Strengthen Measures to Maintain and Secure Broadcasting Services in the Event of a Large-Scale Disaster" was established in February 2025 under the Broadcasting System Study Group to intensively study ways of enhancing and strengthening measures above and beyond existing approaches to maintain and secure broadcasting services in anticipation of future wide-area large-scale disasters with the cooperation of relevant service providers.

3. Reinforcing the foundations of the broadcasting business

(1) AM radio broadcasting initiatives

Many of the AM transmission facilities used by commercial AM radio broadcasters are more than 50 years old and are seriously aging. Commercial AM radio broadcasters have thus been burdened with the cost of both AM and FM equipment because of the start of complementary FM broadcasting introduced to eliminate poor AM radio reception, and they have seen their business income decline, making the cost of updating AM radio broadcasting equipment a significant management issue.

[3] Ministerial Ordinance Partially Amending the Ministerial Ordinance Concerning Definitions of Specified Executives and Relationships of Control in Key Broadcasting Services and Special Provisions on the Standards for Enjoying Freedom of Expression (Ministerial Ordinance No. 13 of 2023)

[4] The guidelines are designed to ensure that freedom of expression through broadcasting is enjoyed by as many people as possible by ensuring that as many people as possible have the opportunity to broadcast, and that the number of key broadcasting stations owned or controlled by any single person is limited.

[5] The Act to Partially Amend the Broadcasting Act and Radio Act (Act No. 40 of 2023)

[6] Summary of Working Group on Public Broadcasting (October 18, 2023):https://www.soumu.go.jp/main_content/000907572.pdf Second Summary of Working Group on Public Broadcasting (February 28, 2024): https://www.soumu.go.jp/main_content/000931107.pdf

[7] Information on content closely related to the content of a broadcast program broadcast or to be broadcast by NHK, comprising materials necessary for editing the said broadcast program (including edited versions of the said broadcast program, excluding the said broadcast program)

[8] In November 2024, MIC convened the "Panel on Competitive Assessment of NHK's Program-related Information Distribution Operations" to hear opinions from academic experts and interested parties on whether NHK's operational rules conform to the provisions of the revised Broadcasting Act, and no participants found the content of NHK's operational rules non-compliant with the revised Broadcasting Act. "Opinions on NHK's Operational Rules" (December 18, 2024): https://www.soumu.go.jp/main_content/000982600.pdf

[9] "Third Report on the Future Vision and Ideal System of Broadcasting in the Digital Age" (December 13, 2024): https://www.soumu.go.jp/menu_news/s-news/01ryutsu07_02000296.html

Given these severe business conditions, MIC has decided to put in place special measures allowing AM stations to suspend operations for a period of six months or longer in order to examine the impact on commercial AM radio broadcasters of making the business decision to switch from AM broadcasting to FM broadcasting (switching to FM) or to discontinue AM broadcasting relay stations without switching to FM, and the details, requirements and procedures for such measures are outlined in the "Basic Policy on Special Measures Concerning AM Station Suspension (published in March 2023, revised in December 2024). These special measures based on this Basic Policy were applied to some AM stations when broadcasters were simultaneously relicensed in November 2023, and these stations have been gradually suspending their operations since February 2024. Another round of special measures will be applied to stations other than these from December 2025 onward to allow them to suspend operations as well. MIC plans to study the necessary institutional arrangements based on the outcomes of these operational suspensions.

(2) Addressing issues in satellite broadcasting

A Study on the future of sustainable satellite broadcasting

Based on the Second Report published in October 2023, MIC convened a "Satellite Broadcasting Working Group" under the Broadcasting System Study Group from November 2023 to September 2024 to resolve satellite broadcasting issues arising in the changing environment surrounding satellite broadcasting and to draw up a vision of the future for sustainable satellite broadcasting, and this Working Group issued a report in December 2024.

The Satellite Broadcasting Working Group has engaged in concrete and specialized discussions on reducing infrastructure costs for satellite broadcasting, utilizing satellite broadcasting as a terrestrial replacement, making effective use of the right-handed circularly polarized band, handling of infomercials in the certification of basic satellite broadcasting, and utilizing satellite broadcasting during disasters. MIC has responded by taking actions based on the results and recommendations emerging from the Satellite Broadcasting Working Group's discussions, e.g., examining technical issues and the willingness of viewers to accept extra costs burden for the use of satellite broadcasting as a terrestrial replacement in February 2025, and establishing a system that provides the option to use the HEVC format with high compression efficiency for 2K broadcasting to make effective use of the right-handed circularly polarized band in March 2025.

B Efforts to promote 4K8K satellite broadcasting

4K8K satellite broadcasting, which began in December 2018 for BS and 110° East longitude CS broadcasting, is steadily making headway, with cumulative shipments of receivers and other equipment capable of viewing 4K8K satellite broadcasting exceeding 20 million units as of July 2024 (approximately 22.5 million units had been shipped by the end of March 2025).

MIC is working with broadcasters, manufacturers, and related organizations to highlight the appeal of ultra-high definition images, a feature of 4K8K satellite broadcasting, and to promote the development of reception environments to facilitate the spread of 4K8K satellite broadcasting.

4K broadcasting in the right-handed circularly polarized band for BS broadcasting, which was approved by MIC in November 2023, began in April 2025, and MIC remains committed to promoting 4K broadcasting.

4. Promoting broadcast content production and distribution

(1) Efforts to effectively distribute broadcast content, etc., online

The Broadcasting System Study Group First Report noted the importance of reducing the equipment burden on local stations and other broadcasters and of creating an environment in which they can focus on content production.

From the perspective of creating such an environment, it is crucial to promote the production of content by broadcasters as well as greater distribution of such content on the airwaves and on the Internet so that it can be widely viewed. In Particular, Local broadcasters are expected to play a major role in disseminating regional information in the future.

Enabling broadcasting to continue fulfilling its role as social infrastructure amid changes in the environment surrounding broadcasting, such as the growth of Internet video distribution services and the diversification of viewing styles, will necessitate promoting the utilization of various Internet platforms and not just broadcasting waves so that Japan's broadcasting content can be widely distributed both domestically and internationally.

From this perspective, the "Working Group on the Promotion of Broadcasting Content Production and Distribution" was convened in cooperation with relevant businesses and other parties in December 2022 under the Broadcasting System Study Group to discuss ways of encouraging the production and distribution of broadcasting content in the Internet age.

The Second Report released in December 2024 recommended that closer public-private partnership initiatives be pursued via demonstrations and other means to bring about environments where viewers can easily view broadcast content via the Internet as soon as possible while paying due attention to a balance between novelty and diversity for viewers, the presentation of content

that matches viewers' tastes and preferences, and the creation of environments where local viewers can easily view content from local stations, with the aim of establishing a virtual platform that ensures a full lineup of broadcast content from NHK and commercial broadcasters on Internet-connected TV receivers (e.g., connected TVs) to improve viewer convenience.

(2) Utilizing viewing data and ensuring privacy protection in broadcasting

The viewing histories of broadcast programs collected from TV receivers connected to the Internet for analysis can be effectively used, for example, to produce programs tailored to the specific viewing needs of viewers in different locales and to provide disaster information, but it is also technically possible to infer sensitive personal information such as the political beliefs and medical histories of individual viewers.

In March 2022, MIC established the "Guidelines for the Protection of Personal Information of Broadcasting Viewers", applicable to all parties handling the personal information of broadcast viewers, etc., in light of the public nature of broadcasting, and has since made a series of revisions. MIC will continue striving to both improve the benefits to broadcast viewers through the use of viewing data and other information and to protect their privacy.

(3) Facilitating rights handling in the simultaneous distribution of broadcast programs, etc.

In light of changes in viewing environments due to the popularity of smart devices and other factors, broadcasters are pursuing initiatives such as simultaneous distribution of broadcast programs on the Internet (including simultaneous streaming, chasing streaming, and catch-up streaming; the same applies hereinafter). This is an important initiative from the viewpoints of improving viewer convenience, promoting the content industry, and ensuring international competitiveness, as it expands opportunities to view high-quality content. On the other hand, a large number and variety of copyrighted works are used in broadcast programs, and issues related to rights handling such as masking might arise due to the inability to handle copyrights and other rights in the case of simultaneous distribution, etc. In pursuing simultaneous transmission, etc., it was thus necessary to create environments that would allow copyrighted works to be used more quickly and smoothly.

MIC, together with the Agency for Cultural Affairs, which has jurisdiction over the Copyright Act (Act No. 48 of 1970), solicited opinions from relevant parties and studied possible system revisions that would facilitate rights handling with regard to simultaneous distribution, etc. Consequently, the "Act for Partial Amendment of the Copyright Act" (Act No. 52 of 2021) was passed in the 204th (regular) Diet session in 2021 and facilitation measures were implemented. MIC has been closely monitoring developments pertaining to rights handling and is studying ways of further facilitating simultaneous transmission, which is now entering full-scale implementation with all five commercial broadcasters having adopted simultaneous transmission in April 2022 after the revisions came into effect. Since local broadcasters lack the personnel and know-how to carry out the administrative tasks involved in rights handling, verification is being conducted to establish a system that will help make rights handling more efficient.

(4) Engaging in appropriate production transactions for broadcast content

MIC has since FY2018 convened the "Study Group on Verification and Review on Promotion of Production and Trade of Broadcast Content" consisting of experts and others in order to improve the production environment for broadcasting content and to boost the motivation to produce content. Based on the Panel's discussions, a series of revisions were made to the "Guidelines for Regulation on Production and Trade of Broadcast Content" (formulated in February 2009; hereinafter, the "Guidelines") and efforts have been made to encourage broadcasters and program production companies to undertake proper production transactions for broadcasting content.

Specifically, MIC strives to gain an accurate picture of circumstances by conducting periodic questionnaire surveys to ascertain the status of production transactions of broadcast content as well as interviews with broadcasters and program production companies to ascertain their compliance with the Guidelines, provides guidance, if any issues are found, under Article 4 of the Act on the Promotion of Subcontracting Small and Medium-sized Enterprises (Act No. 145 of 1970), and holds seminars to raise awareness of the Guidelines; MIC has also set up a "Legal Consultation Hotline for Transaction of Produced Broadcast Content" to provide free consultation with attorneys on specific issues related to production transactions.

The Panel has been discussing the ownership of copyrights, appropriate production costs, and working conditions at program production sites since FY2023, and a revised version of the Guidelines (8th edition) was published in October 2024 based on the results of these discussions.

(5) Expanding broadcast content overseas

With the growth of video distribution services, producing content for overseas broadcasting and distribution and actively pursuing overseas expansion are necessary steps to ensure the competitiveness of Japanese broadcast content and to capture shares in expanding markets.

The overseas dissemination of content is also extremely important from a diplomatic perspective, as it will likely convey Japan's attractiveness to the rest of the world, increase interest in Japan's natural beauty and culture, and help enhance Japan's image.

To this end, MIC will continue supporting the overseas expansion of broadcast content by effectively disseminating information at international content trade fairs held in Japan and elsewhere (TIFFCOM (Japan), ATF (Singapore), MIPCOM (France), etc.) through seminars organized via public-private collaboration. From FY2025, MIC will newly support the production of live-action content using advanced equipment, etc., and human resource development, as well as working toward the overseas dissemination of Japanese content in cooperation with domestic distribution companies, taking into account the viewing environment changes that have taken place vis-a-vis streaming.

(6) Ensuring the competitiveness of the broadcasting and treaming content industry

The global content market is expected to grow further in the future, and Japan has positioned the content industry as a key industry and is making strategic efforts in this area.

In particular, Broadcast content is vulnerable to changes in the external environment and in profit structures, and it is essential that the broadcast content industry be competitive for it to achieve sustainable development.

A new "Broadcast and Streaming Content Industry Strategy Review Team" was therefore organized in March 2025 under the Broadcasting System Stydy Group to work with relevant businesses in intensively studying issues and measures to further promote the broadcast content industry, the most suitable approaches to public-private partnerships, the current status of streaming content markets, and future measures for promoting streaming content.

5. Promoting broadcasting for people with audiovisual disabilities

MIC has formulated "Guidelines for Information Accessibility in Broadcasting" (first published in February 2018, revised in October 2023) to set dissemination targets for subtitled programs, commentary programs, and sign language programs in order to enable people with audiovisual disabilities to access information smoothly through television broadcasting, and MIC facilitates voluntary efforts by broadcasters in this regard.

In accordance with 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, sign language programs, etc. Since subtitling live broadcast programs requires considerable manpower and costs as well as personnel with special skills, subsidies have also been provided since FY2020 for the cost of the equipment needed to subtitle live broadcast programs, including systems that utilize cutting-edge ICT.

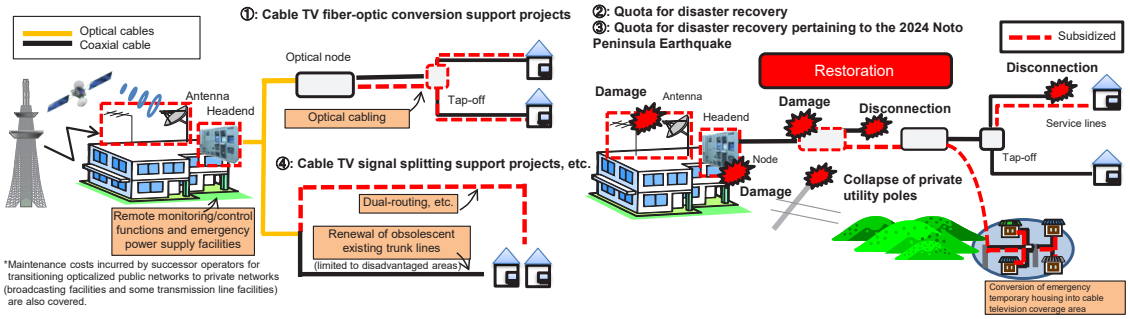
6. Enhancing the robustness and disaster resilience of broadcasting networks

(1) Strengthening the disaster resilience of cable networks

MIC has been carrying out the "Project to Strengthen the Disaster Resilience of Cable Television Networks" under the FY2024 supplementary budget and the FY2025 initial budget to support efforts aimed at making cable television networks more resilient to disasters, including conversions to optical fiber lines and the installation of multiple lines, as well as supporting disaster recovery efforts for cable television facilities damaged by the January 2024 earthquake in the Noto region of Ishikawa Prefecture, in order to ensure that information can be transmitted reliably and stably in the event of a disaster (**Figure 2-2-4-1**). Starting with the FY2024 supplementary budget, the requirements to qualify as a disadvantaged area have been relaxed and the fiscal capacity index requirement eliminated, and measures have been taken to support projects limited to the installation of emergency power supply facilities.

Assistance is also being offered to upgrade and replace aging shared antenna facilities in remote areas, etc., through the "Project to Replace Small Relay Stations for Basic Terrestrial Broadcasting with Broadband, etc." in the initial budget for FY2025 (**Figure 2-2-4-2**).

Figure 2-2-4-1 Cable Television Network Disaster Resilience Enhancement Project



(Project implementer) Municipality, municipal partnership or third sector
(Includes those who continue to play a role in providing cable television services by accepting transfers of facilities from these parties (successor entities))
(Project scheme) Subsidized project
(Areas eligible for subsidy) (1) Municipalities where cable TV is positioned within local disaster prevention plans
*Limited to disadvantaged areas only for projects being carried out by parties whose operational areas include more than 10 municipalities
(Subsidy ratios) ①④ (1) municipalities and municipal partnership entities (successor entities): 1/2, (2) third sector (successor entities): 1/3
① Municipalities with a financial strength index of more than 0.5: 1/3
*1/3 for Maintenance by successor operators accepting transfers of opticalized public networks to the private sector.
②: 1/2 , ③ 2/3
(Subsidy-eligible expenses (red line in the above figure)) Optical fiber cables, transmission/reception equipment, antennas, etc.
③*This also covers the restoration of facilities other than those previously maintained and the extension of cable coverage areas to temporary housing under MIC's budget
④*Maintenance of emergency power supply facilities (only) is also covered
(Plan year) From FY2018

Figure 2-2-4-2 Project to Support Broadband Substitution of Small Relay Stations for Basic Terrestrial Broadcasting

Project Image

○ Project implementer

(1) Municipalities, municipal partnerships, broadcasters, telecommunications providers, and broadcaster/telecommunications provider partnerships

(2) Municipalities and municipal partnerships

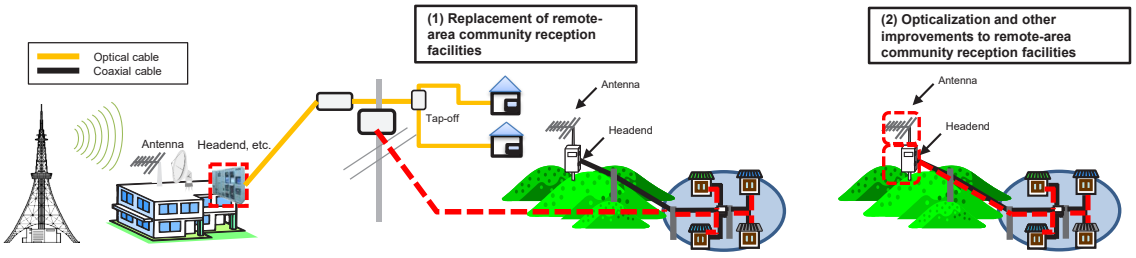
○ Subsidy ratios

(1) Replacement of remote-area community reception facilities : 2/3

(2) Opticalization and other improvements to remote-area community reception facilities: 1/2

○ Expenses to be subsidized (red dotted line in the figure below)

Optical fiber cables, transmission/reception equipment, antennas, etc.
*Limited to areas where relay stations have not been discontinued
*Includes transmission line facilities, etc., necessary for replacement by cable TV (including that using IP multicast systems) as part of the opticalization of remote-area community reception facilities (coaxial cables).
*For replacements, the cost of removing existing facilities is included.



(2) Supporting efforts by broadcasters, etc.

MIC is supporting efforts by broadcasters, local governments, etc. to make broadcasting networks more robust through the "Support Project for Improving Broadcasting Networks (Project for Improving Basic Terrestrial Broadcasting Networks)", the "Support Project for Eliminating Poor Commercial Radio Reception", and the "Support Project for Strengthening the Disaster Resilience of Basic Terrestrial Broadcasting, etc." **(Figure 2-2-4-3)** under the FY2024 supplementary budget and the FY2025 initial budget.

Figure 2-2-4-3 Project for Improving Basic Terrestrial Broadcasting Networks, Support Project for Eliminating Poor Commercial Radio Reception, and Support Project for Strengthening the Disaster Resilience of Basic Terrestrial Broadcast, etc.

- To reliably provide disaster, evacuation and other information essential for securing citizens' lives and property, broadcast networks as important means of transmitting information in the event of a disaster will be made more robust and more disaster-resistant.

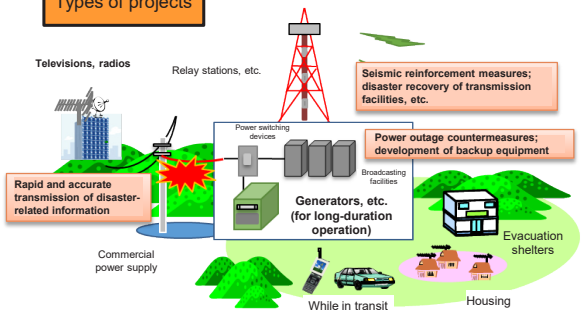
Subsidy ratios

1. Projects to enhance basic terrestrial broadcasting networks, etc.
   - Local governments: 1/2
   - Basic terrestrial broadcasters, etc., third sector: 1/3

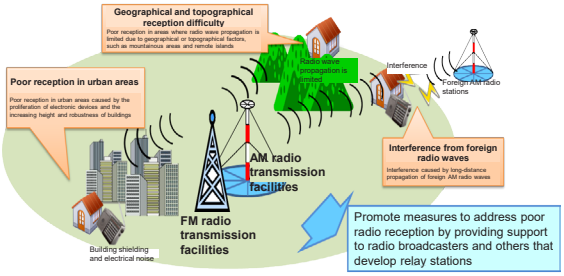
2. Projects to help eliminate poor commercial radio reception
   - Poor reception due to geography/terrain, foreign broadcast interference: 2/3
   - Poor reception in urban areas: 1/2

3. Projects to reinforce the disaster resistance of basic terrestrial broadcasting systems, etc.
   - Local governments, etc.: 1/2
   - Basic terrestrial broadcasters, etc.: 1/3
     *Municipalities in disadvantaged areas with financial strength index figures of 0.5 or less implementing projects relating to relay stations as measures against poor reception: 2/3

Types of projects



1. Projects to enhance basic terrestrialing broadcast networks, etc.
3. Projects to reinforce the disaster resistance of basic terrestrial broadcasting systems, etc.



2. Projects to help eliminate poor commercial radio reception