

Section 8 Promotion of international strategies for ICT

1. Summary

(1) Initiatives so far

Based on the “Infrastructure System Overseas Promotion Strategy 2030” (decided by the Ministerial Meeting on Strategy relating to Infrastructure Export and Economic Cooperation on December 24, 2024)¹, the MIC has been actively engaged in the overseas expansion of digital infrastructure and digital solutions. This includes activities such as project discovery, proposal and formation, as well as providing comprehensive support for companies, including support for human resource development, maintenance, and finance, from the stage of development to commercialization.

Furthermore, the ministry has actively participated in

(2) Future challenges and directions

The acceleration of social and economic digitalization is leading to an increased demand for the development and enhancement of communication networks and effective digital solutions for problem-solving. Moreover, the importance of high-quality infrastructure has been highlighted as discussions on economic security have intensified. In this context, leveraging bilateral and multilateral frameworks to expand Japan’s high-quality infrastructure overseas not only contributes to addressing domestic social issues in various countries but also helps tackle global challenges such as climate change, and further contributes to the realization of the SDGs. Additionally, enhancing the international competitiveness and global presence of Japan through the dissemination and development of digital technologies is crucial for the economic development of the nation.

In light of these circumstances, in June 2025, the MIC decided the basic policies and measures to be imple-

mented for the core digital fields of the “Infrastructure System Overseas Promotion Strategy 2030” to enhance Japan’s international competitiveness and economic security toward 2030 and formulated the “Comprehensive Strategy for Digital Overseas Promotion 2030².” Going forward, based on this strategy, the MIC will set the priority fields to enhance Japan’s international competitiveness and economic security based on concepts such as “global-first” and “market-in” and through the enhancement of collaboration with like-minded countries for the promotion of strategic measures from R&D through to the acquisition of shares in the global market.

Furthermore, in order to take a leading role in international rule-making in the digital field, the MIC will proactively participate in international discussions through international conferences and other opportunities.

2. Expansion of digital infrastructures overseas

In the context of the increasing global demand for communication infrastructure and services due to the advancement of digitalization in society and the economy, the MIC is enhancing the international competitive-

ness of Japan’s digital industry and promoting global problem-solving using digital technology by measures such as supporting overseas deployment of digital infrastructure.

(1) Overseas promotion support tools by the MIC

The MIC is implementing initiatives that take into account the circumstances and challenges of each country, providing support tailored to each phase from basic research to demonstration projects for the overseas expansion of Japan’s high-quality digital infrastructure.

Additionally, in February 2021, the MIC established the “Japan Platform for Driving Digital Development,” a public-private partnership framework to support the

overseas expansion of Japan’s ICT (**Figure 2-2-8-1**). As of the end of January 2025, more than 200 members including Japanese ICT companies and related governmental ministries and agencies are participating in this framework to share information about 70 countries and regions through a database, hold workshops, form teams, and discuss specific projects.

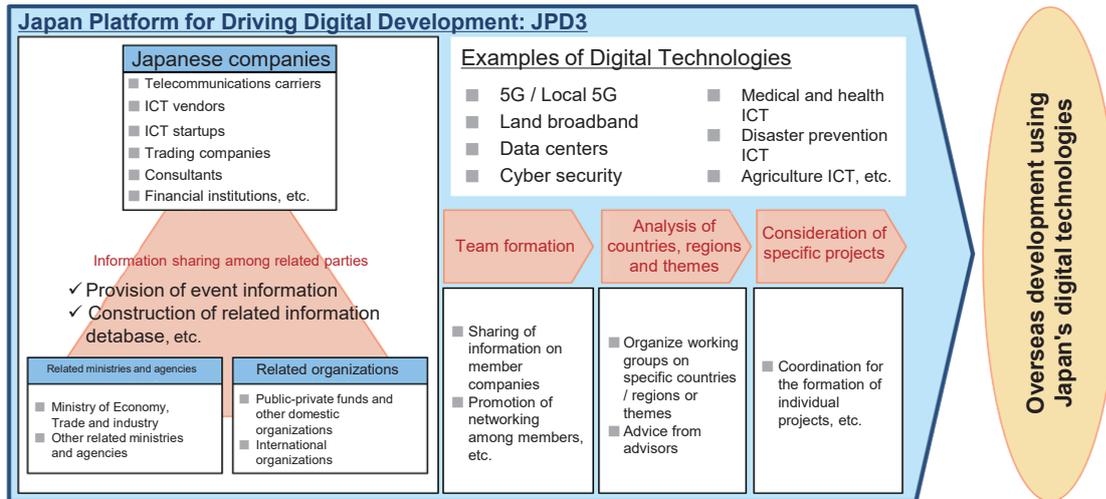
¹ Infrastructure System Overseas Promotion Strategy 2030

<https://www.kantei.go.jp/jp/singi/keikyou/dai58/siryou6.pdf>

² Announcement of the “Comprehensive Strategy for Digital Overseas Promotion 2030” (June 11, 2025)

https://www.soumu.go.jp/menu_news/s-news/01tsushin06_02000319.html

Figure 2-2-8-1 Japan Platform for Driving Digital Development



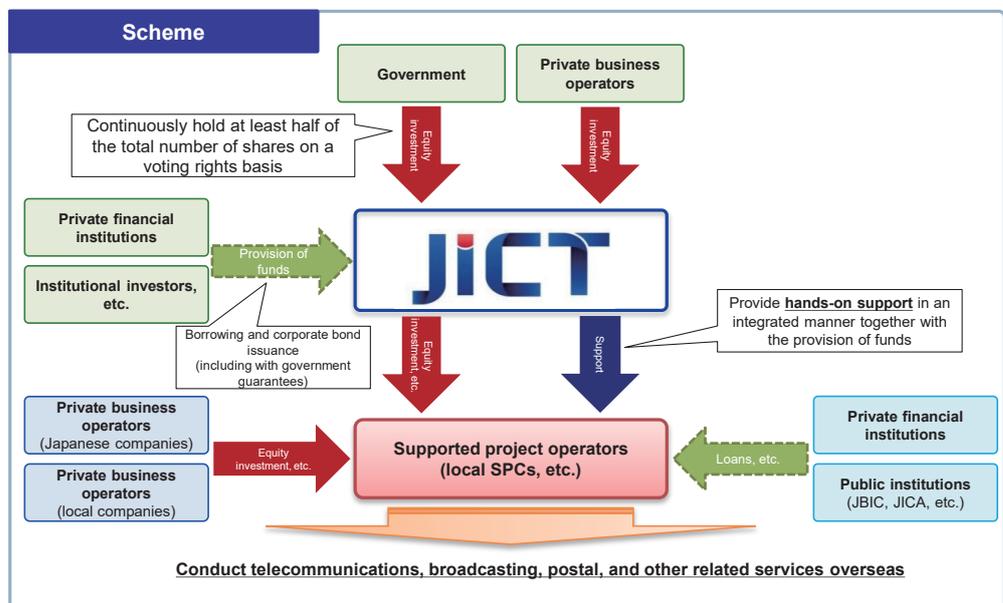
(2) Fund Corporation for the Overseas Development of Japan's ICT and Postal Services (JICT)

The Fund Corporation for the Overseas Development of Japan's ICT and Postal Services (JICT), a public-private fund under the jurisdiction of the MIC, provides investment and hands-on support to those conducting or supporting communication, broadcasting, and postal services overseas (Figure 2-2-8-2). As of the end of March 2025, the JICT has decided to support investments and loans in a cumulative total of approximately 153.5 billion yen.

tries, the support criteria of the JICT were revised in February 2022 (Ministry of Internal Affairs and Communications Notification No. 34 of 2022). This revision allows the JICT to support projects that do not involve the construction of physical infrastructure (ICT service projects) and to make LP investments in funds. This has made it easier to support the overseas expansion of not only large enterprises but also medium-sized, small, and regional companies. As a result, the JICT decided to give new financial support to five entities.

Furthermore, considering the recent developments in ICT, the needs, and the policy trends of various coun-

Figure 2-2-8-2 Support through the Fund Corporation for the Overseas Development of Japan's ICT and Postal Services (JICT)



(3) Initiatives towards overseas expansion in each area

A Core communication infrastructure

Regarding mobile communication networks, in 2021, the Ethiopian government approved the granting of licenses to an international consortium, including Japanese companies, for the country's mobile phone business, and commercial communication services commenced in October 2022. This provides Japan with

an opportunity to promote the expansion of digital solutions in Ethiopia and the African region.

In the area of submarine optical cables, the JICT is supporting submarine optical cable projects in Southeast Asia, with a total project cost of approximately 400 million dollars, including support decisions for up to 78

million dollars in investment. Furthermore, Japan participated in a submarine optical cable installation project in the Indian Ocean region announced by Prime Minister Modi of India in August 2020, with Japanese companies starting to participate in the project in September 2021, and this project was completed in July 2023. Efforts are also being made to improve communication environments in Pacific Island countries with the cooperation of willing countries and relevant ministries and agencies. Additionally, Japan signed a memorandum of cooperation with the European Commission for the establishment of safe, resilient, and sustainable global submarine cable connectivity³ in July 2023.

Regarding 5G, as the importance of safe and secure 5G networks is discussed internationally, efforts are being made to deploy “Open RAN,” which is gaining attention as a technology to realize open and secure networks as well as systems that utilize it for overseas expansion. For example, surveys on the potential for Open RAN deployment were conducted in Vietnam and the Philippines in FY2022, and in Australia and Indonesia in FY2023. In the Philippines, based on the results of the survey conducted in FY2022, a demonstration experiment was conducted in FY2023 to verify the usefulness of Open RAN devices. Subsequently in FY2024, another demonstration was carried out for a field trial. Also, in the U.K., the test environment for Open RAN was established and the conformance of RAN devices to the inter-

B Utilization models for digital technology

Regarding the utilization of digital technology in the medical field, Japanese companies have been winning contracts for smartphone-based telemedicine systems, primarily in the Central and South American region. Since FY2020, the MIC has been working on the dissemination and deployment of endoscopes developed by using high-definition imaging technology and AI-based diagnostic support systems to Southeast and Southwest Asian countries. This effort includes conducting demon-

C Broadcasting content

In order to increase the overseas sales revenue related to broadcast content by 1.5 times by FY2025 compared with FY2020, the MIC will continue to support the measures implemented by broadcasting companies and others by organizing seminars and other events at relevant international fairs, including TIFFCOM (in Japan),

D Other areas

(A) Fire prevention

Since the signing of the “Memorandum of Cooperation in the Field of Firefighting between the Minister for Internal Affairs and Communications of Japan and the Ministry of Public Security of the Socialist Republic of Vietnam” on October 8, 2018, the MIC has been highlighting the high quality of Japanese firefighting equipment through exchanges of opinions on preventive policies and stan-

face specifications defined by the O-RAN Alliance was tested in FY2022. Moreover, in FY2024, a demonstration experiment was conducted locally in Cambodia for the adoption of Japan’s Open RAN devices in the country. Furthermore, a field test and survey on the effectiveness of 5G/Open RAN communication networks and a survey for the field demonstration of flexible communication terminal architecture for Beyond 5G/6G were conducted in India in FY2024.

Regarding data centers, since March 2021, Japanese companies have been participating in projects aimed at improving the telecommunications environment in Uzbekistan, including the development of data centers and other telecommunications infrastructure. Additionally, through the JICT, the MIC has been supporting the development and operation of data centers in India, with a decision made in October 2022 to provide funding of up to 86 million dollars (and another decision made in May 2024 to provide additional funding of up to 91.2 million dollars).

The Japanese Digital Terrestrial TV Broadcasting System (ISDB-T System) has been adopted by 20 countries, primarily in Central and South America. In October 2022, Botswana completed the transition to digital broadcasting nationwide, becoming the first country outside Japan to do so. Costa Rica and Chile also completed the transition in January 2023 and April 2024, respectively. The MIC will continue to give support for smooth transitions to digital broadcasting.

strations in local hospitals.

For the utilization of digital technology for traffic infrastructure, demonstration experiments were conducted on expressways and airports in Thailand in FY2024, in which Japanese infrastructure maintenance and management systems were used to centrally manage ground and underground information by using three-dimensional image information captured by in-vehicle equipment and other devices.

AFT (in Singapore) and MIPCOM (In France). Also, in FY2025, the MIC will start implementing new measures to support the creation of live-action content using advanced equipment and to promote overseas distribution of the content in cooperation with domestic content distributors.

dards for firefighting equipment. Additionally, during the period from February to March 2025, the MIC conducted advanced training on fire prevention technology. Moving forward, the ministry will continue to engage with Vietnam and other Southeast Asian countries to promote the overseas expansion of firefighting equipment that meets Japanese standards.

³ https://www.soumu.go.jp/menu_news/s-news/01tsushin08_02000155.html

(B) Postal service

Targeting mainly emerging and developing countries in Southeast Asia, Europe, and the Caucasus region, the MIC is promoting the overseas expansion of the Japanese postal infrastructure system through a public-private partnership. This involves understanding the chal-

lenges and needs related to improving the quality of postal services and optimizing postal operations, and providing Japanese expertise, experience, technology, and systems to address and meet these needs.⁴

(C) Administrative consultation

In the field of administrative consultation, the MIC has been collaborating and cooperating with public ombudsmen from various countries. The ministry has signed memorandums of cooperation on administrative complaint resolution with four countries: Vietnam, Uz-

bekistan, Iran, and Thailand. Based on these agreements, the MIC has implemented initiatives such as accepting a total of approximately 310 trainees from Vietnam.

3. Contribution to formulation of international rules on the digital economy

(1) Data Free Flow with Trust (DFFT)

Regarding Data Free Flow with Trust (DFFT), an international framework for the realization of DFFT (Institutional Arrangement for Partnership: IAP) was agreed upon at the G7 Digital and Technology Ministers' Meet-

ing held in Takasaki, Gunma in April 2023. Subsequently, the establishment of the IAP was approved at the G7 Summit held in May, and the IAP was established under the OECD in December of the same year.

(2) Response to discussions on international rules in cyberspace**A Formulation of international rules in cyberspace**

The MIC attributes importance to two points in the formulation of international rules in cyberspace: (1) full consideration to the free flow of information, which not only supports democracy but also serves as a source of innovation and an engine for economic growth; and (2) the necessity of a multi-stakeholder framework that includes the participation of all the related stakeholders such as companies in the private sector, academia, and civil society, who actually use and manage the internet, to ensure sufficient cybersecurity. Based on these

points, the ministry has been addressing related topics in bilateral dialogues such as the U.S.-Japan Dialogue on Digital Economy (the U.S.-Japan DDE) and strengthening cooperation with like-minded countries. Additionally, in April 2022, Japan, the U.S., Australia, Canada, the EU, and the UK, along with other willing countries, launched the “Declaration for the Future of the Internet,” and the MIC has actively participated in discussions at multilateral meetings.

B Bilateral and multilateral dialogues on cybersecurity

Regarding bilateral government discussions on cybersecurity, the “9th Japan-US Cyber Dialogue⁵” was held in June 2024, followed by the “8th Japan-UK Cyber Dialogue⁶” in September 2024 and the “6th Japan-EU Cyber Dialogue⁷” in November 2024. These dialogues included discussions on situational awareness, initiatives in both countries or those implemented between Japan and the EU, international cooperation, and capacity-building support, helping Japan strengthen cooperation with various countries.

the ASEAN-Japan Cybersecurity Policy Meeting has been a platform for exchanging opinions and information on the status of initiatives in each country and capacity-building support for the ASEAN region. Additionally, under the framework of the so-called Quad (Japan, the U.S., Australia, and India), cooperation on cybersecurity has been agreed upon, and discussions aimed at strengthening cooperation within the Quad countries have been conducted. The “Quad Cybersecurity Partnership: Joint Principles⁸” was announced in the joint statement of the Quad Leaders' Meeting in May 2022.

In terms of multilateral discussions on cybersecurity,

(3) Promotion of trade liberalization in the ICT sector

From the perspective of complementing the multilateral free trade system centered around the World Trade Organization (WTO) and promoting bilateral economic partnerships, Japan is actively working on concluding Economic Partnership Agreements (EPA) and Free Trade Agreements (FTA).

For example, since 2018, Japan has discussed and reached the signing and enforcement of several agreements, including the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), the Japan-EU Economic Partnership Agreement (Japan-EU EPA), the Japan-US Digital Trade Agreement, the Japan-

⁴ For specific measures, refer to (2) “Support for overseas deployment of Japanese postal infrastructure” in Section 9. 3, Chapter 2, Part II.

⁵ https://www.mofa.go.jp/press/release/pressite_000001_00394.html

⁶ https://www.mofa.go.jp/press/release/pressite_000001_00588.html

⁷ https://www.mofa.go.jp/press/release/pressite_000001_00728.html

⁸ <https://www.mofa.go.jp/files/100347801.pdf>

UK Comprehensive Economic Partnership Agreement (Japan-UK EPA), and the Regional Comprehensive Economic Partnership (RCEP). Additionally, negotiations for the Japan-UAE EPA are ongoing. In all EPA negotiations, Japan aims to achieve liberalization commitments exceeding WTO standards in the telecommunications

(4) Promotion of strategic international standardization

International standardization in the information and communication sector is a crucial policy issue that leads to the creation of global markets through the unification of standards. Securing strategic initiatives in the formulation of international standards is extremely important from the perspective of enhancing Japan's international competitiveness. Based on this recognition, the MIC is strategically promoting international standardization activities.

Specifically, the ministry is conducting trend surveys on de jure standards in the information and communication field⁹ and on forum standards, which have been increasing their presence¹⁰, fostering the development of personnel versed in international standardization, and implementing initiatives to deepen understanding of the roles and effects of standardization activities.

In FY2024, initiatives to enhance the human resources foundation to support the continuous promotion of

sector, by demanding the removal or relaxation of foreign investment restrictions, negotiating the establishment of competition-promoting regulations such as interconnection rules, and holding discussions on cooperation among the signatory countries.

international standardization activities were started by the effective use of the Cabinet Office's Standard Utilization Acceleration Support Program. Specifically, the MIC is developing training curriculum based on a set of roles, knowledge and skills required of talent engaged in standardization (formulation of rules) in the information communication and digital fields. Also, the ministry is designing and building a business model related to educational programs to encourage companies in the private sector to make practical and effective use of relevant educational programs and popularize them. In addition, in consideration of the importance of developing managers who can lead discussions on international standardization and of increasing the number of people engaged in standardization, the MIC started to implement measures to support promising personnel in conducting international standardization activities.

4. Economic security in the digital field

In view of the importance of economic security in the communication field, such as 5G, initiatives have been undertaken in the digital field. For example, the "Global Digital Connectivity Partnership" (GDGP) was launched in April 2021 following the Japan-U.S. summit, and the "Cooperation Memorandum on 5G Supplier Diversification and Open RAN" was signed at the Japan-U.S.-Australia-India (Quad) summit in May 2022. Building on these, in May 2023 at the Japan-U.S.-Australia-India summit, an "Open RAN Security Report" was released. Furthermore, the Global Coalition on Telecommunications (GCOT)¹¹, which was launched by Japan, the U.K., Australia, Canada and the U.S. in October 2023, released an outcome document on the Open RAN and AI¹² in January 2025. Japan has been making these efforts to ensure the safety and reliability of

global digital infrastructure in collaboration with the U.S. and other like-minded countries.

Furthermore, under the Act on the Promotion of Ensuring National Security through Integrated Implementation of Economic Measures established in 2022, four systems were created. Among these, under the system related to "Ensuring the Stable Provision of Specific Social Infrastructure Services," the establishment of the cabinet order and the ministerial ordinance¹³ was completed in November 2023. Under this system, specific operators in the telecommunications, broadcasting, and postal sectors that meet the designated criteria have been designated. The operation of this system commenced in May 2024.

5. International cooperation in multilateral frameworks

The MIC actively leads international cooperation efforts in the ICT sector through policy discussions within multilateral frameworks such as G7/G20, APEC, APT, ASEAN, ITU, the United Nations, WTO, and OECD. These efforts aim to promote the free flow of informa-

tion, ensure a safe and secure cyberspace, develop high-quality ICT infrastructure, and contribute to the achievement of the United Nations Sustainable Development Goals (SDGs).

⁹ Standards formulated by official international standardization organizations such as the International Telecommunication Union (ITU)

¹⁰ Standards formulated through consensus among multiple companies, universities, and other stakeholders

¹¹ https://www.soumu.go.jp/menu_news/s-news/01tsushin08_02000163.html

¹² https://www.soumu.go.jp/menu_news/s-news/01tsushin08_02000185.html

¹³ "Cabinet Order of the Act on the Promotion of Ensuring Security by Taking Integrated Economic Measures" and "Ordinance of the Minister for Internal Affairs and Communications on Specified Social Infrastructure Operators Based on the Act on the Promotion of Ensuring Security by Taking Integrated Economic Measures"

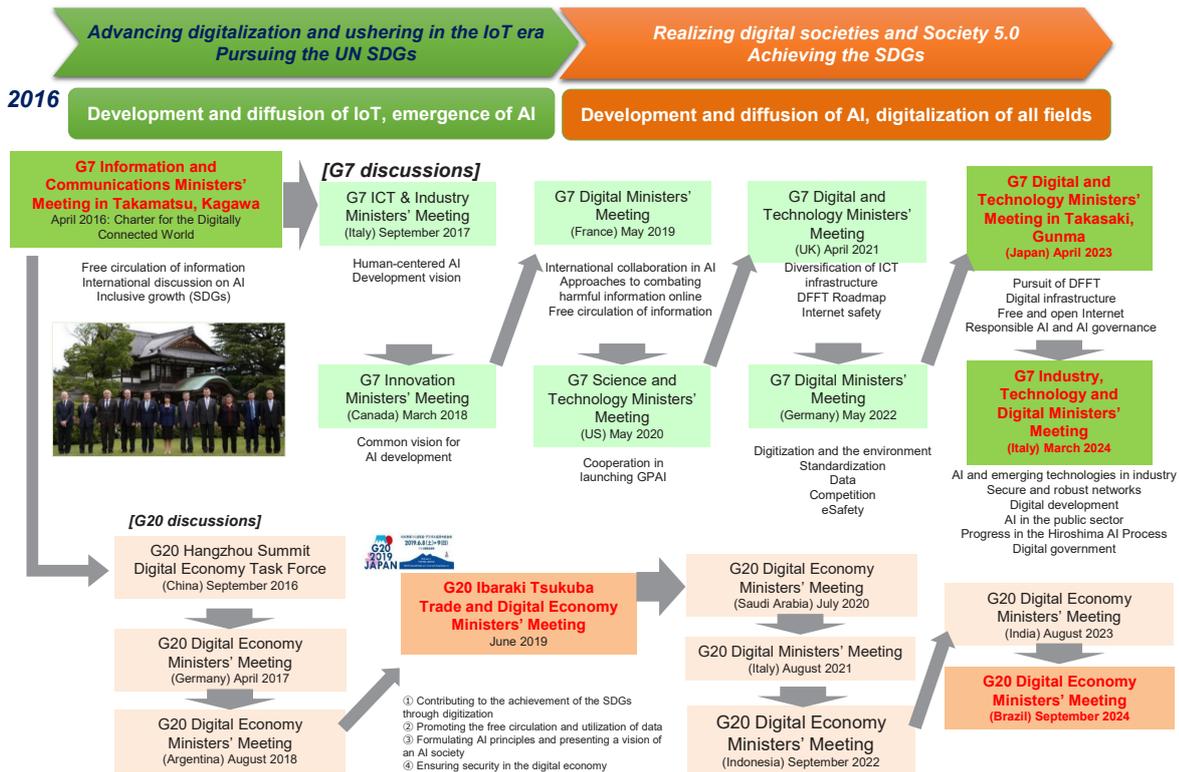
(1) G7/G20

Within the G7 framework, active discussions on policies for the development of the digital economy have been ongoing since the G7 ICT Ministers' Meeting was held in Takamatsu, Kagawa in April 2016.

Similarly, within the G20 framework, which includes countries like China and India, continuous discussions on the digital economy have been taking place. Specifically, at the "G20 Ministerial Meeting on Trade and Digital Economy in Tsukuba, Ibaraki" held in Tsukuba, Ibaraki Prefecture, in June 2019, the G20 agreed for the

first time on AI principles based on a "human-centered" approach. These principles were also endorsed at the G20 Osaka Summit at the leaders' level. The concept of promoting the Data Free Flow with Trust (DFFT) was also supported at the leaders' level and its importance was reaffirmed at the G20 Digital Economy Ministers' Meeting (Saudi Arabia) in 2020. Subsequently, the importance of the concept was reaffirmed again in G20 Rio de Janeiro Leaders' Declaration in 2024 and other related discussions (Figure 2-2-8-3).

Figure 2-2-8-3 Overview of discussion on ICT and digital policy in G7/G20



(2) Hiroshima AI Process

In light of the rapid development and widespread adoption of generative AI, which is becoming a significant issue for the international community, the "Hiroshima AI Process¹⁴" was established to discuss international governance concerning generative AI. This process involved intensive discussions among G7 members starting in May 2023, culminating in the "G7 Hiroshima AI Process Digital and Tech Ministers' Meeting" in September of the same year, where an interim report was compiled. Subsequently, another G7 Digital and Tech Ministers' Meeting was held in December 2023, under Japan's G7 presidency, to finalize the "Hiroshima AI Process Comprehensive Policy Framework,"¹⁵ the first international policy framework concerning the development and use of advanced AI systems like generative AI. Additionally, the "Work Plan to Advance Hiro-

shima AI Process" was formulated, outlining future G7 initiatives. These outcomes were endorsed in the G7 Leaders' Statement issued in the same month. Based on this work plan, Italy, the G7 chair for 2024, expressed its commitment to continuing the "Hiroshima AI Process." In the "G7 Industrial, Technology, and Digital Ministerial Declaration" adopted in March, the countries agreed to develop and introduce a Reporting Framework to encourage AI developers to voluntarily make and release reports about the status of their compliance with the Hiroshima AI Process International Code of Conduct, thereby fostering transparency and accountability in generative AI development. Subsequently, in December, following discussions by G7, the countries reached an agreement on the basic implementation method of the Reporting Framework and on the final draft of the ques-

¹⁴ Hiroshima AI Process: <https://www.soumu.go.jp/hiroshimaaiprocess/>

¹⁵ This policy framework consists of four components: the "OECD Report Towards a Common Understanding of Generative AI by the G7," the "Hiroshima Process International Guidelines for All AI Stakeholders and Organizations Developing Advanced AI Systems," the "Hiroshima Process International Code of Conduct for Organizations Developing Advanced AI Systems," and "Project-Based Cooperation."

tionnaire form, and in February 2025, the Reporting Framework started to be implemented officially. In April 2025, 19 organizations, including seven Japanese companies, submitted their first responses, which were disclosed on the OECD's website.

At the OECD Ministerial Council Meeting held in May 2024, a side event titled “Towards Safe, Secure, and Trustworthy AI: Promoting Inclusive Global AI Governance” was held. Prime Minister Kishida (then) announced the establishment of the “Hiroshima AI Pro-

(3) Asia-Pacific Economic Cooperation (APEC)

The Asia-Pacific Economic Cooperation (APEC) is an economic cooperation framework aimed at sustainable development in the Asia-Pacific region, involving major countries and regions within the area. Discussions on telecommunications are primarily conducted through the Telecommunications and Information Working Group (TEL) and the Ministerial Meeting on Telecommunications and Information Industry (TELMIN).

Following the adoption of the “Aotearoa Plan of Ac-

(4) Asia-Pacific Telecommunity (APT)

The Asia-Pacific Telecommunity (APT) is an international organization in the Asia-Pacific region established in 1979, focusing on balanced development in telecommunications and information infrastructure. It aims to foster the development of human resources through training and seminars and coordinate regional policies on standardization and wireless communications. Since 2021, Mr. KONDO Katsunori from the MIC has been serving as the Secretary-General.

The MIC supports APT activities through contributions, facilitating training programs, and promoting exchanges among ICT engineers and researchers in areas where Japan excels, such as broadband, wireless communications and cybersecurity. In FY2024, support was

(5) Association of South-East Asian Nations (ASEAN)

The Association of South - East Asian Nations (ASEAN) is a regional cooperation organization comprising ten Southeast Asian countries. Its main objectives are to promote economic growth, social and cultural develop-

A Contribution to achieving the goals of the “ASEAN Digital Masterplan 2025”

To achieve the goals set out in the “ASEAN Digital Masterplan 2025,” formulated in January 2021, Japan annually proposes the “ASEAN-Japan Digital Work Plan” for cooperation and collaboration in the ICT field over the coming year. This plan is implemented with the approval of the ASEAN side. For example, utilizing the

B Strengthening cooperation in the field of cybersecurity

Currently, the ASEAN-Japan Cybersecurity Capacity Building Centre (AJCCBC)¹⁷ continuously conducts practical cybersecurity defense exercises (CYDER) and other cybersecurity exercises, both online and in-per-

son, for cybersecurity personnel from government agencies and critical infrastructure operators in ASEAN countries. Activities have started to be conducted under a new project framework since 2023 and will be contin-

ment, ensure political and economic stability, and foster cooperation on regional issues. Policies in the digital field are discussed at the “ASEAN Digital Ministers’ Meeting (ADGMIN).”

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tion” at the 2021 APEC Leaders’ Meeting, TEL is currently examining the implementation of “Innovation and Digitalization,” one of the economic drivers highlighted in the action plan.

The MIC actively contributes to TEL's operations by participating in its discussions at TEL held twice a year, and at TELMIN fostering a project for the solution of aging society-related social issues by the use of ICT, and introducing ICT policies implemented in Japan. provided for nine training sessions, three international joint R&D projects, and one pilot project.

The APT holds a ministerial meeting once in around five years, with the participation of ministers and those in similar positions from APT members. At this meeting, participating ministers decide on the direction of future measures for the enhancement of regional cooperation toward the development of the ICT field in the Asia-Pacific region and announce it in the form of a statement. In May 2025, the Asia-Pacific Telecommunity Ministerial Meeting was held in Tokyo, and the Tokyo Statement¹⁶ was unanimously adopted as a vision to foster sustainable, inclusive and equitable digital transformation (DX) in the Asia-Pacific region.

ASEAN-Japan ICT Fund established with contributions from Japan, various joint projects with ASEAN countries are carried out. In FY2024, the “Workshop for Regional CERT Cooperation and Cybersecurity Standards in ASEAN” was held for Japan and ASEAN countries to exchange information and views on cybersecurity.

¹⁶ https://apt.int/sites/default/files/file_tag/2025/05/APT-MM_2025-Tokyo_Statement_for_press_1.pdf

¹⁷ <https://ajccbc.ncsa.or.th/>

ued until 2027, with efforts to enhance exercise content.

Additionally, the MIC regularly holds ASEAN-Japan Information Security Workshops for ISP operators in ASEAN countries to promote information sharing and strengthen cooperation frameworks among stakehold-

(6) International Telecommunication Union (ITU)

The International Telecommunication Union (ITU) (headquartered in Geneva, Switzerland) is a specialized agency of the United Nations (UN) with 194 member countries and regions. Its mission is to promote international cooperation for the improvement and rational use of telecommunications, enhance the efficiency of telecommunications operations, and promote the development and efficient operation of technical means to increase the use and dissemination of telecommunications. The ITU is composed of the following three sectors, which engage in activities such as frequency allocation, telecommunication technology standardization, and

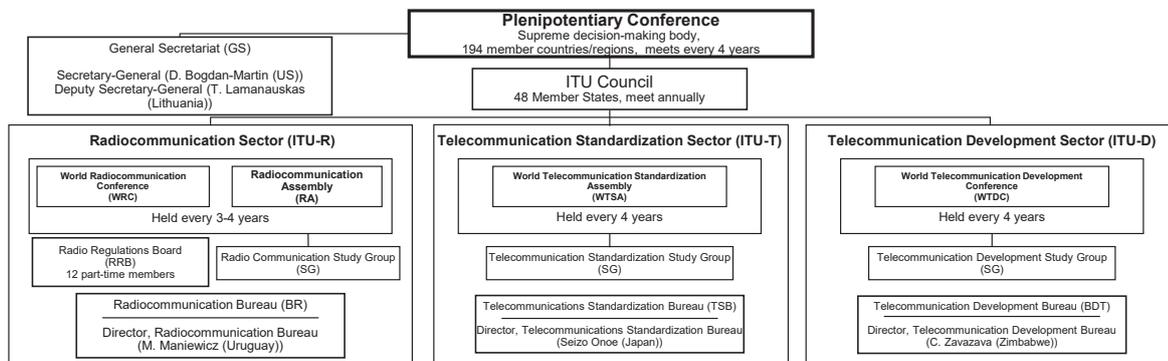
ers. A meeting was held in March 2025 to maintain and develop cooperative and collaborative relationships in the field of cybersecurity between Japan and ASEAN countries.

support for the development of telecommunications in developing countries (Figure 2-2-8-4).

- (1) Radiocommunication Sector (ITU-R)
- (2) Telecommunication Standardization Sector (ITU-T)
- (3) Telecommunication Development Sector (ITU-D)

In September 2022, elections were held at the Plenipotentiary Conference, and Mr. ONOE Seizo from Japan (former Chief Standardization Strategy Officer of Nippon Telegraph and Telephone Corporation) was elected as the Director of the Telecommunication Standardization Bureau. He assumed office in January 2023 (the term is four years, with a maximum of two terms).

Figure 2-2-8-4 Organizations in ITU



A Initiatives in ITU-R

In ITU-R, activities are conducted to ensure the effective, efficient, economical, and fair use of radio frequencies by all radiocommunication services. This includes conducting studies on frequency usage and developing standards related to radiocommunication.

Among these activities, the Radiocommunication Assembly (RA), which approves draft recommendations submitted by various Study Groups (SGs) and deliberates on issues and organizational structures for the next study period, and the World Radiocommunication Conferences (WRC), which aim to revise the Radio Regulations governing international frequency allocation, are the largest meetings held by ITU-R every three to four years. The MIC has actively contributed to these discussions.

At RA-23, held in Dubai, the UAE, in November 2023, new draft recommendations, including those providing an overall picture of the capabilities and use cases required for the development of specifications for the next-generation mobile phone systems expected to

B Initiatives in ITU-T

ITU-T conducts technical studies necessary for the formulation of international standards related to communication network technologies and operational meth-

be realized around 2030, were approved.

Furthermore, at WRC-23, held from November to December of 2023, participants agreed on the expansion of the frequency bands for International Mobile Telecommunication (IMT) and the securing of a frequency band for high-altitude platform stations (HAPSS) to serve as base stations for IMT. Deliberations were made also on the agenda for WRC-27, which is slated to be held in 2027, and participants agreed to discuss frequency allocation for mobile phone-satellite direct communication, the moon surface and lunar orbit, and space weather sensors.

For the next study period (2024 to 2027), Mr. KONO Takahiro (SKY Perfect JSAT), Mr. IMATA Satoshi (KDDI) and Mr. OIDE Satoshi (NHK) were appointed vice-chair of SG 4 (satellite services), SG 5 (terrestrial services) and SG 6 (broadcasting services), respectively. Also, Mr. KAWAI Nobuyuki (KDDI) was selected to be the chair of the APT Conference Preparatory Group for WRC-27 (APG-27).

ods.

The World Telecommunication Standardization Assembly (WTSA), the highest decision-making meeting

of ITU-T, is held every four years. In October 2024, WTSA-24 was held in New Delhi in India. At WTSA-24, integration of Study Groups (SG 9 and SG 16) was agreed for the first time in 16 years by ITU-T, which had been discussed in light of the proposal made by Japan at the meeting of the Telecommunication Standardization Advisory Group (TSAG) held in January 2024.

C Initiatives in ITU-D

ITU-D provides support for the development of the information and communication technology (ICT) sector in developing countries. The World Telecommunication Development Conference (WTDC), the highest decision-making meeting of ITU-D, is held every four years, and the next WTDC-25 is slated to be held in Baku, Azerbaijan from November 17 to 28, 2025. During the current study period (2022-2025), activities such as discussions by the Study Groups (SGs) at biannual meetings, the implementation of ICT development support projects and ICT talent development are being pro-

(7) United Nations

A Global Digital Compact (GDC)

In “Our Common Agenda,” which was presented by United Nations Secretary-General Guterres in September 2021, an expectation was expressed for common principles on “an open, free and secure digital future for all,” and subsequently in September 2023, it was proposed that an agreement be reached on the Global Digital Compact (GDC) at the Summit of the Future to be held in 2024. Then, the GDC was adopted (on Septem-

B Internet Governance Forum (IGF)

The Internet Governance Forum (IGF) is one of the most important international conferences in the field of Internet policy, where governments, private sector, technical and academic communities, and civil society engage in dialogue on various public policy issues related to the Internet on an equal footing.

In October 2023, Japan hosted the 18th IGF meeting at the Kyoto International Conference Center in Kyoto, with what was then a record number of over 6,000 local participants and approximately 10,000 participants in total, including online attendees. During the opening ceremony, Prime Minister Kishida (at the time) emphasized the importance of the Internet as the foundation of democratic society and expressed strong support and commitment to “multi-stakeholder approach discussions” to maximize the benefits of the Internet and address its negative aspects.

Additionally, during a special AI session following the opening ceremony, Japan shared the Hiroshima AI Process, which Japan leads, with the international community. In his keynote speech, Prime Minister Kishida (at the time) emphasized the importance of leading international rule-making to ensure that the entire international community, including the Global South, can enjoy the benefits of trustworthy, safe and secure generative AI

TSAG is an organization that advises on WTSAs resolutions and the standardization activities of various ITU-T Study Groups (SGs). Following the agreement, SG 21 was newly established. Also, at the assembly, new resolutions on AI, the metaverse and others were approved, and leaders for the SGs were appointed.

moted based on the strategic goals and action plans adopted at WTDC-22 held in Kigali, Rwanda in June 2022¹⁸.

In cooperation with the ITU, the MIC has been implementing a range of projects including the Connect2Recover initiative to enhance digital infrastructure and resilience, the Innovation and Entrepreneurship Alliance to give technical support and entrepreneurship support and projects to increase the resilience of ICT infrastructure and develop cybersecurity talent in the Asia-Pacific region.

ber 22, 2024) as an annex to the outcome document “Pact for the Future” of the Summit of the Future held in 2024.

The GDC sets five objectives while showing the principles on inclusiveness, development-oriented approach and multistakeholderism. The five objectives include closing digital divides and enhancing international governance of AI.

and achieve further economic growth and improvements in living environments. Furthermore, Minister for Internal Affairs and Communications Suzuki (at the time) introduced the status of discussions on “International Guiding Principles and Code of Conduct for AI Developers” and expressed the intention to continue seeking opinions from various stakeholders. Through this session, voices of support and expectations for the Hiroshima AI Process were received from panelists representing multi-stakeholders, including governments, industries, international organizations, and academia from countries beyond the G7.

Furthermore, an exhibition area called the “IGF Village” was set up during the IGF meeting, with 72 companies and organizations from around the world participating in the exhibition. From Japan, 25 companies and organizations, including telecommunications companies and research institutions, showcased remote robots and measures against manga piracy, actively promoting Japan’s technological capabilities and initiatives through interactions with participants from various countries who visited the booths.

In December 2024, the 19th IGF meeting was held in Saudi Arabia, and Japan hosted a session on Internet governance and AI and participated in high-level ses-

¹⁸ The event, originally scheduled to be held in 2021, was postponed by one year due to the global spread of the COVID-19.

sions to share the importance of the multistakeholder approach, thereby proactively contributing to the meet-

(8) World Trade Organization (WTO)

The progress of the negotiations in the field of telecommunications at the WTO has not been observed since the basic telecommunications negotiations reached an agreement in 1997, due to the stagnation of the Doha Round negotiations that began in 2001. However, in light of increasing attention to electronic commerce, which handles data flows on the Internet, a group of like-minded countries initiated electronic com-

(9) Organization for Economic Co-operation and Development (OECD)

The Digital Policy Committee (DPC) of the Organization for Economic Co-operation and Development (OECD) has been conducting pioneering discussions in the field of ICT. The MIC actively contributes to policy discussions at the OECD by providing personnel and financial support to the OECD Secretariat, as well as having its officials appointed as the chair of the DPC (from January 2020) and vice-chairs of various working groups.

The DPC has been working on initiatives related to AI since 2016, outlining principles that those involved in AI should share and the issues that governments should address. In May 2019, the first intergovernmental agreement on AI, the “Recommendation of the Council on Artificial Intelligence,” was adopted and made public. Subsequently, proactive initiatives have been undertaken,

(10) GPAI

The Global Partnership on Artificial Intelligence (GPAI) is an international public-private partnership organization established to realize the development and utilization of “Responsible AI” based on a human-centric approach. The launch of GPAI was proposed at the Biarritz Summit (France) in 2019, and after participants in the G7 Science and Technology Ministers’ Meeting under the U.S. presidency in May 2020 agreed on G7 cooperation for its establishment, it was officially founded in June of the same year with the participation of 14 countries and the EU.

In November 2022, Japan hosted the GPAI Summit 2022 and served as the chair country for one year starting from that month. At the Ministerial Council, under the initiative of Japan as the chair country, the first-ever ministerial declaration at a GPAI Summit was adopted. This declaration included agreements among countries on promoting AI based on human-centric values, opposing the illegal and irresponsible use of AI, and contributing to a sustainable, resilient, and peaceful society.

In December 2023, the GPAI Summit 2023 was held in India, the chair country for 2024, and at the Ministerial Council, it was agreed to support projects aimed at promoting fair access to key resources for AI research and innovation—such as AI computing and high-quality datasets—and to establish the first GPAI Expert Support

ing.

merce negotiations at the WTO in 2019. Subsequently, in 2024, co-convenors (Japan, Australia, and Singapore) issued a joint statement on behalf of countries and regions participating in the negotiations. In the statement, the co-convenors announced that participants had achieved a stabilized text on the Agreement on Electronic Commerce and then published the text.

such as the launch of the online platform “OECD.AI” for AI policy (February 2020) and the establishment of the AI Governance Working Group (AIGO) (May 2022).

In May 2024, the Meeting of the OECD Council at Ministerial Level (MCM) was held in Paris, France, with Japan, celebrating its 60th anniversary as an OECD member, serving as the chair country. Discussions were held in the MCM, taking into account the achievements of the “Hiroshima AI Process,” and the ministerial declaration expressed the support of the OECD member countries for its achievements and their cooperation in advancing practical efforts, as well as the revision of the “Recommendation of the Council on Artificial Intelligence.”

Center in the Asian region in Tokyo.

Furthermore, in July 2024, India held an ad-hoc GPAI mid-year summit as the chair country, where it was decided to enhance GPAI-OECD collaboration through integrated management with the related working groups of the OECD and the integration of GPAI and OECD AI expert communities.

Also, in the same month, the GPAI Tokyo Expert Support Center was established at the National Institute of Information and Communications Technology (NICT). The Center, under the GPAI framework, provides operational and management support for survey and research activities led by GPAI experts, including generative AI-related projects contributing to the promotion of the Hiroshima AI Process.

In December 2024, Serbia hosted the GPAI Summit 2024 as the chair country for 2025. Participants in the summit meeting approved the acceptance of new members (including developing and emerging countries) based on the OECD AI Principles (Recommendation of the Council on Artificial Intelligence I); arrangement of a non-official ministerial meeting on the sidelines of the AI Action Summit to be hosted by France (in February 2025), based on a proposal by France, with the participation of GPAI member candidates; and appointment of Slovakia as the chair country for 2026.

(11) ICANN

For Internet resources such as IP addresses and domain names, which are essential for Internet use, it is crucial to manage and coordinate them globally to prevent duplicate allocations. Currently, the international management and coordination of these Internet resources are carried out by the Internet Corporation for Assigned Names and Numbers (ICANN), a non-profit organization established in 1998. ICANN is responsible for the allocation of IP addresses, coordination of domain names, operation and deployment of the root server system, and the formulation of policies related to these activities.

The MIC actively participates in and contributes to discussions held by ICANN's Governmental Advisory Committee with the participation of national govern-

ments and international organizations. For example, when the Registry Agreement (RA) and the Registrar Accreditation Agreement (RAA) were revised in April 2024, the MIC proposed that the enforcement situation be monitored regularly for the sharing of the results among governments. Also, regarding the domain name system (DNS) abuse¹⁹, the MIC has submitted opinions on proposed amendments to the Registrar Accreditation Agreement (RAA) to be concluded between ICANN and registrars, and has raised the awareness of the need for ongoing discussions within ICANN to prevent illegal activities on the Internet, while leading the relevant sessions in collaboration with the U.S. and the European Commission.

6. International cooperation in bilateral relationships

(1) Policy cooperation with the U.S.

Following the “U.S.-Japan Competitiveness and Resilience (CoRe) Partnership”²⁰ issued after the U.S.-Japan Summit on April 16, 2021, the “Global Digital Connectivity Partnership (GDCP)”²¹ was launched in May of the same year to promote secure connectivity and a vibrant digital economy (Figure 2-2-8-5).

The MIC, in cooperation with relevant ministries and agencies, has been continuously holding the “the U.S.-Japan Dialogue on Digital Economy (the U.S.-Japan DDE)”²² with the U.S. Department of State since 2010. Since the launch of the GDCP, the U.S.-Japan DDE has been positioned as a framework for promoting the GDCP. The MIC is making use of this framework to promote Japan-US cooperation in the digital field.

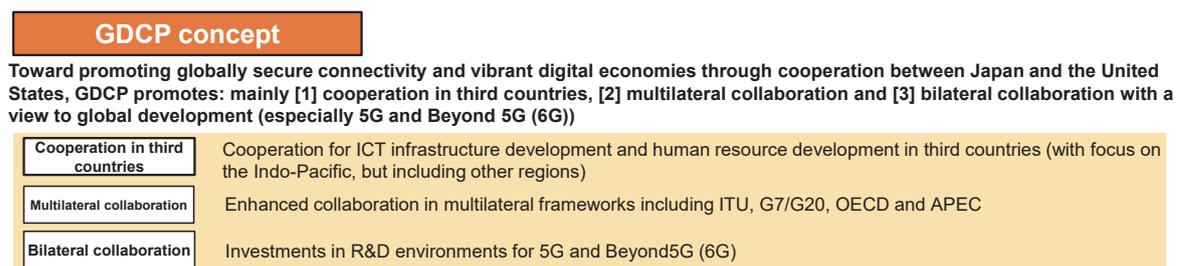
The 14th U.S.-Japan DDE public-private and intergovernmental meetings were held in a hybrid format (both

in-person and online) on February 6 and 7, 2024. During these meetings, a wide range of topics was discussed, including 5G and Beyond 5G (6G), AI governance, Cross-Border Privacy Rules (CBPR), cooperation on government access, international cooperation, and cooperation within the United Nations. As a result of these discussions, a “Joint Statement from the 14th U.S.-Japan Dialogue on Digital Economy” was published²³.

In October 2024, the 9th GDCP Expert-Level Working Group was held, where opinions were exchanged on further promoting the U.S.-Japan cooperation with third countries.

At the U.S.-Japan Summit held in February 2025, a joint statement by the leaders was published²⁴, confirming further collaboration between the U.S. and Japan in AI and in third-country cooperation on Open RAN.

Figure 2-2-8-5 Global Digital Connectivity Partnership (GDCP)



(2) Cooperation with Europe

A Cooperation with the European Union (EU)

The MIC has been holding the “Japan-EU ICT Policy Dialogue” as a platform for exchanging information and opinions on ICT policies with the Directorate-General

for Communications Networks, Content and Technology of the European Commission. During the 30th Japan-EU ICT Policy Dialogue held in March 2025, discussions

¹⁹ Distribution of malware, botnet spreading and phishing using the DNS. According to ICANN, for the purposes of the RA and the RAA, DNS abuse means malware, botnets, phishing, pharming and spam (when spam is used as a delivery mechanism for any of other four types of DNS Abuse). Issues related to piracy websites and child pornography may be discussed under the same framework.

²⁰ https://www.mofa.go.jp/mofaj/na/na1/us/page1_000951.html

²¹ https://www.soumu.go.jp/menu_news/s-news/01tsushin08_02000119.html

²² In the joint statement issued at the “13th the U.S.-Japan Policy Cooperation Dialogue on the Internet Economy” held on March 6 and 7, 2023, it was decided to rename the meeting to the “U.S.-Japan Dialogue on Digital Economy.”

²³ https://www.soumu.go.jp/menu_news/s-news/01tsushin08_02000172.html

²⁴ https://www.mofa.go.jp/mofaj/na/na1/us/pageit_000001_01583.html

were held on topics such as 5G/Beyond 5G (6G), submarine cables, digital infrastructure including data centers, AI, online platforms, quantum technology and cybersecurity.

Furthermore, in May 2022, the Japan-EU Digital Partnership was established at the Japan-EU Summit held in May 2022. On the Japanese side, the MIC, the Digital Agency and the Ministry of Economy, Trade and Industry are the main participants, while on the EU side, the Directorate-General for Communications Networks, Content and Technology of the European Commission takes the lead for Japan-EU cooperation in the digital

B Bilateral cooperation with European countries

(A) U.K.

In December, 2022, the MIC, the Digital Agency, and the Ministry of Economy, Trade and Industry of Japan and the Department for Science, Innovation and Technology (DSIT) of the United Kingdom launched the “UK-Japan Digital Partnership” as a ministerial-level framework, upgrading the previous director general-level framework, with the aim of addressing priority issues at a higher level. Based on this partnership, Japan has been implementing a range of measures in the digital field in cooperation with the United Kingdom.

In 2024, the two countries enhanced bilateral cooperation for the future of telecommunications and diversification. In November of the same year, under the Global Business Innovation Program (GBIP) implemented by Innovate UK, representatives of tech companies engaged in R&D in the digital field were dispatched to Japan to interact with their counterparts in Japanese research institutes and companies, with support from the MIC and the National Institute of Information and Com-

(B) Germany

In order to deepen mutual understanding in the policy aspects of the information and communications field and promote cooperation between Japan and Germany in the field, the MIC has been holding the “Japan-Germany ICT Policy Dialogue” with the Federal Ministry for Digital and Transport (BMDV). The 8th meeting was held in November 2024, where discussions on various topics, including initiatives related to Open RAN, progress in research and development towards Beyond 5G, AI, dis-/mis-information and metaverse took place. On the same day, a public-private meeting was also held, and information was exchanged regarding initiatives implemented by the Japanese and German industries for 5G/Open RAN, Beyond 5G, all-photonics network (APN) and oth-

(C) France

The MIC has been holding the “Japan-France ICT Consultations” with the French Ministry for the Economy, Finance, and Industrial and Digital Sovereignty to facilitate information sharing on important themes in the ICT field. At the 23rd meeting held in December

field. In 2024, against dis-/mis-information, the MIC regularly exchanged opinions on online safety with the related authorities. Subsequently in April 2025, the ministry launched international joint R&D with the European Commission for Beyond 5G, utilizing the fund established at the National Institute of Information and Communications Technology (NICT).

The third ministerial meeting of the Japan-EU Digital Partnership Council was held in May 2025, and participants discussed issues related to submarine cables, online platforms and AI, and made a joint statement²⁵ as the outcome document of the meeting.

munications Technology (NICT). Moreover, the Japan-UK Telecoms Policy Dialogue was held on the sidelines of the event with the participation of the MIC and the NICT from Japan and DSIT and Innovate UK from the United Kingdom. Participants in this meeting exchanged opinions on the promotion of Beyond 5G/6G, further diversification of supply chains through Open RAN, and the standardization of technologies on future networks.

At the third Ministerial Japan-UK Digital Council held in January 2025, participants reviewed how the two sides had cooperated in the examination of R&D initiatives in the Beyond 5G/6G field, enhancement of collaboration through the Hiroshima AI Process Friends Group and in other efforts made under the Japan-UK Digital Partnership. Then, a joint statement²⁶ was made and announced to show a strategic direction towards the next cooperation stage.

er new communication network technologies. In November 2024, an international digital dialogue meeting was held by BMDV in Berlin, Germany. The MIC participated in the political roundtable meeting and high-level keynote meeting and contributed to discussions regarding connectivity, inclusiveness, digital public infrastructure and other issues.

Furthermore, based on the letter of intent for cooperation related to Beyond 5G/6G and future communication technologies²⁷, the MIC implemented a Japan-Germany international joint R&D project and Japan-Germany Beyond 5G/6G workshops with the Federal Ministry of Research, Technology and Space of Germany (including the latest one held in January 2025 in Sendai).

2024, participants discussed issues about the R&D activities for Beyond 5G/6G, utilization and governance of AI towards the AI Action Summit (held in Paris in February 2025) and digital infrastructure including submarine cables.

²⁵ https://www.soumu.go.jp/menu_news/s-news/01tsushin08_02000192.html

²⁶ https://www.soumu.go.jp/menu_news/s-news/01tsushin08_02000186.html

²⁷ https://www.soumu.go.jp/menu_news/s-news/01tsushin04_02000145.html

(3) Cooperation with Asia-Pacific countries

The MIC is cooperating with information and communication authorities of Asia-Pacific countries in the field

A Republic of Korea

In December 2023, the MIC held the “Japan-Korea ICT Policy Dialogue” with the Ministry of Science and ICT of the Republic of Korea. The dialogue was intended for the exchange of views on mutual interests in the field

B India

In May 2022, the MIC and the Ministry of Communications of India held the 7th Japan-India Joint Working Group meeting online to share the progress of initiatives in the field of ICT, such as 5G/Beyond 5G and Open RAN, and exchanged views on future cooperation be-

C Southeast Asian countries

With the Philippines, the MIC signed a memorandum of cooperation for ICT with the Department of Information and Communication Technology of the Philippines in February 2023 and agreed to further strengthen cooperation in the ICT field, including support for the construction of 5G networks including Open RAN. Additionally, during the Japan US-Philippines Summit held in April 2024, a “Joint Vision Statement by Japan, the Philippines, and the United States” was announced, confirming the strengthening of cooperation in the field of information and communication, including cooperation related to Open RAN.

With Indonesia, the building of Open RAN was added as a new area of cooperation to the memorandum of cooperation in the ICT field signed between the MIC and the Ministry of Communication and Informatics in October 2023, and the two sides agreed to further deepen cooperation also for 5G, AI, and big data.

With Cambodia, the MIC exchanged the joint minutes on future bilateral cooperation in the digital field with the Ministry of Post and Telecommunications of Cambodia in December 2023 and agreed to further promote bilateral cooperation for the development of the digital

D Australia

Following a joint statement on telecommunications resilience and security in the Indo-Pacific in July 2022, the “Japan Australia Telecommunications Resilience Policy Dialogue” was established. This framework involves the MIC from Japan, and the Department of Home Affairs and the Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts from Australia. Through the dialogue, the two sides will regularly share information and hold discussions on information and communications fields, including Open RAN, 5G, submarine cables, and satellite communications, and consider the implementation of joint projects as needed. Also, through the dialogue, digital connectivity in the Indo-Pacific region will be ensured and improved for the realization of “Free and Open Indo-Pacific” (FOIP).

of ICT, including communication infrastructure development and the utilization of ICT.

of ICT, such as AI and Open RAN, and the two sides agreed to hold dialogue meetings on a regular basis going forward.

tween Japan and India. In August 2023, a sub-group meeting on Open RAN, with the participation of Japanese and Indian companies, was held to exchange information to facilitate specific cooperation.

economy and society.

With Malaysia, the ministry signed a memorandum of cooperation for information and communication fields with the Ministry of Communications and Digital of Malaysia in November 2023 and agreed to further strengthen bilateral cooperation in the fields, including cooperation for 5G security and future advanced networks. In March 2024, the Japan-Malaysia ICT Joint Working Group meeting was held for the two sides to share information about the progress of initiatives in the fields of ICT, broadcasting, and cybersecurity and exchange views on future bilateral cooperation. In conjunction with the working group, the Japan-Malaysia ICT Collaboration Conference was held, providing Japanese and Malaysian companies with an opportunity to introduce their initiatives to both governments, including the latest measures implemented for broadcasting and ICT.

With Vietnam, the MIC signed a memorandum of cooperation in information and communication fields with the Ministry of Information and Communications of Vietnam in August 2024, and the two sides agreed on the promotion of bilateral cooperation in new fields, such as Open RAN.

The third meeting of the Policy Dialogue and the Track 1.5 meeting, in which those from the private sectors of the two countries also participated, were held in April 2025. Participants exchanged information and views on initiatives in the field of information and communications, such as Open RAN, Beyond 5G (6G), submarine cables, cybersecurity, and inter-carrier roaming in emergencies. The two sides agreed to continue collaborating on common policy issues. At the Track 1.5 meeting, participants from companies in the private sectors of the two countries briefed on their businesses in the Indo-Pacific region and discussed the challenges faced on-site in the businesses to reaffirm the need for the public and private sectors to enhance Japan-Australia collaboration.

(4) Cooperation with countries in Central and South America

In Central and South America, the adoption of Japanese Digital Terrestrial TV Broadcasting System (ISDB-T System) was implemented in Brazil in 2006, and since then the scheme has been adopted in 14 countries. Currently, support is provided for efforts towards the cessation of analog broadcasting in each country. Also, Japan helped countries such as El Salvador and Nicaragua to introduce disaster prevention ICT utilizing the Emergency Warning Broadcast System (EWBS), a feature of the Japanese broadcasting scheme.

Furthermore, in order to enhance cooperative relations with Central and South American countries not only in the field of broadcasting, which has traditionally maintained cooperative relations through the adoption of Japan's terrestrial digital broadcasting scheme (ISDB-T), but also in a wider range of ICT fields, the MIC has recently concluded memoranda of cooperation in this field with the Ministry of Technologies of Information and Communication of the Republic of Paraguay and the National Commission of Telecommunications of Paraguay (May 2024), with the Ministry of Science, Innovation, Technology and Telecommunications of the Republic of Costa Rica (August 2024), with the Ministry of Information and Communication Technology of the Re-

(5) Cooperation with other regions

A Cooperation with Africa

Cooperation in the ICT sector with African countries has progressed, starting with the adoption of Japanese Digital Terrestrial TV Broadcasting System (ISDB-T System) in Botswana (adopted in 2013, fully digitized in October 2022) and Angola (adopted in 2019). In August 2022, the 8th Tokyo International Conference on African Development (TICAD8) was held in Tunisia. The MIC hosted an online seminar and exhibition on digital transformation (DX) as an official side event. In May 2023, a memorandum of cooperation (MoC) in the fields of ICT and postal services was signed with the Ministry of

B Cooperation with the Middle East

The MIC has been strengthening its cooperative relationship with Saudi Arabia. Based on the "Japan-Saudi Vision 2030" (2017) and the memorandum of cooperation on ICT signed with the Ministry of Communications and Information Technology of Saudi Arabia (2019), various initiatives have been undertaken. These include dispatching a public-private mission to Saudi Arabia (October 2018), holding ICT public-private workshops (January 2022), and participating in LEAP, the largest technology exhibition in the Middle East, where Japan's booth was established and a public-private work-

shop was held locally by the Japanese side (March 2024). These efforts were made to build cooperative relationships between companies from both countries and support the deployment of Japanese technologies in the region.

Also, taking the opportunity of the 70th anniversary of diplomatic relations with Israel, an MoC in the fields of telecommunications technology and postal services was signed with the Ministry of Communications of Israel in April 2023.

public of Colombia (September 2024) and with the Ministry of Communications of the Republic Federal of Brazil (March 2025).

Based on the memoranda of cooperation concluded with each of the countries, the MIC has been pushing ahead with measures to help these countries solve their social issues by utilizing Japan's advanced ICT. As the latest examples, surveys were conducted on the feasibility of introducing Japan's ICT-based early earthquake detection and analysis technologies in Colombia and a demonstration of ICT solutions using Japan's mesh Wi-Fi technology was carried out in Brazil in FY2024.

For U.S.-Japan cooperation with third countries, 5G seminars were held targeting Central and South American countries to explain the importance of building an open and secure 5G network to them. In December 2024, Brazil and the U.S. jointly held an Open RAN symposium, in which the MIC participated to brief on Japan's measures to foster Open RAN. In addition, the MIC is supporting Japanese companies having advanced technologies in the field in expanding their business to Central and South America, and in FY2023, demonstrations were carried out in Peru and Brazil regarding the Open RAN-based 5G environment.

Communications and Information Technology of Egypt. In February 2024, an MoC in the field of ICT was signed with the Ministry of Information, Communications, and the Digital Economy of Kenya.

Moreover, various demonstration projects have been conducted to address social issues in Africa and support Japanese companies in business expansion in the region. These projects include those implemented in Senegal, Rwanda and other countries for communication infrastructure, agricultural ICT, medical ICT and remote education.

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1. Economic security

According to the “National Security Strategy of Japan” (decided by the Cabinet in December 2022), economic security means to ensure Japan’s national interests, such as peace, security, and economic prosperity, by taking economic measures. In light of the fact that various threats are being posed to Japan through economic means, the Government of Japan aims to execute necessary economic measures to enhance Japan’s self-reliance and secure the advantage and indispensability concerning its technologies and others. In the international context, while working with like-minded countries and in cooperation with the private sector, Japan is expected to contribute to the maintenance and enhancement of the international economic order based on free, fair and equitable rules and implement global measures for co-existence and co-prosperity in the international community, while ensuring the stable supply of important items for the enhancement of supply chains.

The importance of economic security is increasing amid the progress of globalization and the intensification of global competition. For example, as the international economic environment is becoming more complex, the number of cases of “economic coercion,” which means to exploit the relationships of economic dependence between countries for political purposes, is increasing. In order to respond to such coercion, Japan needs to collaborate with like-minded countries and increase its economic self-reliance and the indispensability of its technologies. Specifically, it is necessary for Japan to increase the resilience of its supply chains

through the diversification of supply sources and implement measures for the stable supply of important items and services.

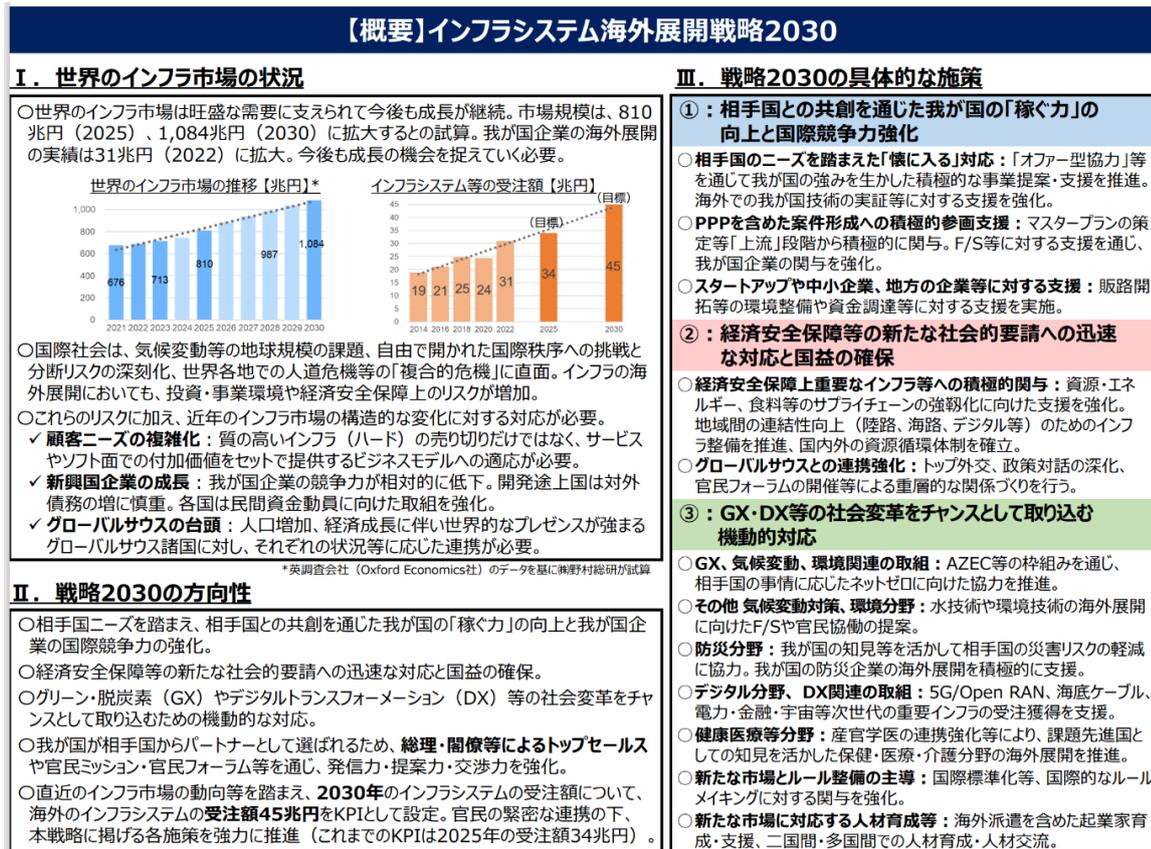
The Government of Japan, via the Ministerial Meeting on Strategy relating to Infrastructure Export and Economic Cooperation, has been promoting the overseas deployment of the infrastructure systems supplied by Japanese companies, focusing on the need to maintain Japan’s economic security and foster its economic growth. In December 2024, the ministerial meeting formulated the “Infrastructure System Overseas Promotion Strategy 2030” (hereinafter, the “Infrastructure Strategy 2030”) for the first time in five years, drastically revising the former version (**Figure 1**).

The Infrastructure Strategy 2030 upholds the following three as strategic pillars:

- (1) Improving Japan’s “earning power” and strengthening international competitiveness through co-creation with partner countries
- (2) Responding quickly to new societal demands such as economic security and ensuring national interests
- (3) Responding flexibly to embrace social changes such as green transformation (GX) and digital transformation (DX)

Based on these pillars, the Government of Japan is implementing comprehensive measures to ensure the country’s economic self-reliance in and outside the country as well as the indispensability of Japanese products and systems.

Figure 1: Overview of the Infrastructure System Overseas Promotion Strategy 2030



(Source) Infrastructure System Overseas Promotion Strategy 2030 (decided by the Ministerial Meeting on Strategy relating to Infrastructure Export and Economic Cooperation in December 2024)¹

2. Importance of economic security in the digital field

The digital field plays a fundamental role in the field of contemporary economic activities. In particular, digital infrastructure is part of the important infrastructure that supports people's daily lives and industrial activities. It is therefore critical for Japan to secure economic security in this field as a precondition to maintain its national competitiveness. However, Japan is facing challenges, such as declining development investments by domestic telecommunications carriers, increasing dependence on foreign vendors, and concerns about the safety, transparency and openness of digital infrastructure, due to the decrease in population and changes in the market environment.

The telecom industry, which supports Japan's digital infrastructure, achieved growth driven by strong domestic demand and increased its international competitive-

ness. Presently, however, companies engaged in the industry are finding it difficult to maintain their competitiveness based on their traditional business models, due to market shrinkage caused by the decrease in population and the emergence of global vendors. On the other hand, demand for AI, propelled by the rapid development of generative AI, is explosively increasing, which in turn is generating special demand for the establishment of safe and highly reliable digital infrastructure to meet the demand, not only in Japan but across the world. Amid this situation, it is necessary for Japanese companies to take advantage of the expanding demand to achieve growth and increase their international competitiveness, while reducing excessive dependence on foreign vendors and eliminating concerns over the economic security.

3. Specific measures in priority areas

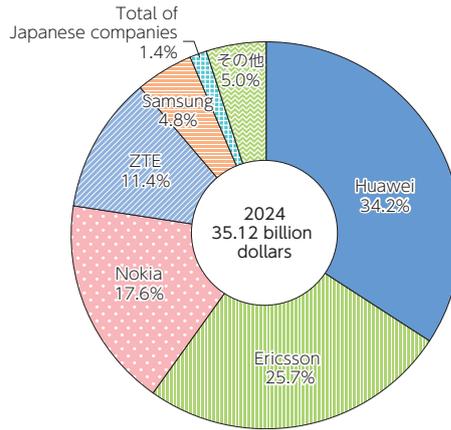
(1) 5G/Open RAN

5G networks are important digital infrastructure that supports people's daily lives and economic activities, and the safety and sustainability of these networks are directly related to Japan's economic security. However, at present, Japanese companies as a whole hold only

about a 2% share in the 5G base station market, which is dominated by foreign companies (Figure 2). This situation is heightening economic coercion and supply chain risks posed to Japan.

¹ <https://www.kantei.go.jp/jp/singi/keikyou/dai58/siryou1.pdf>

Figure 2: Global macro-cell base station market shares (in terms of shipment value in 2024)

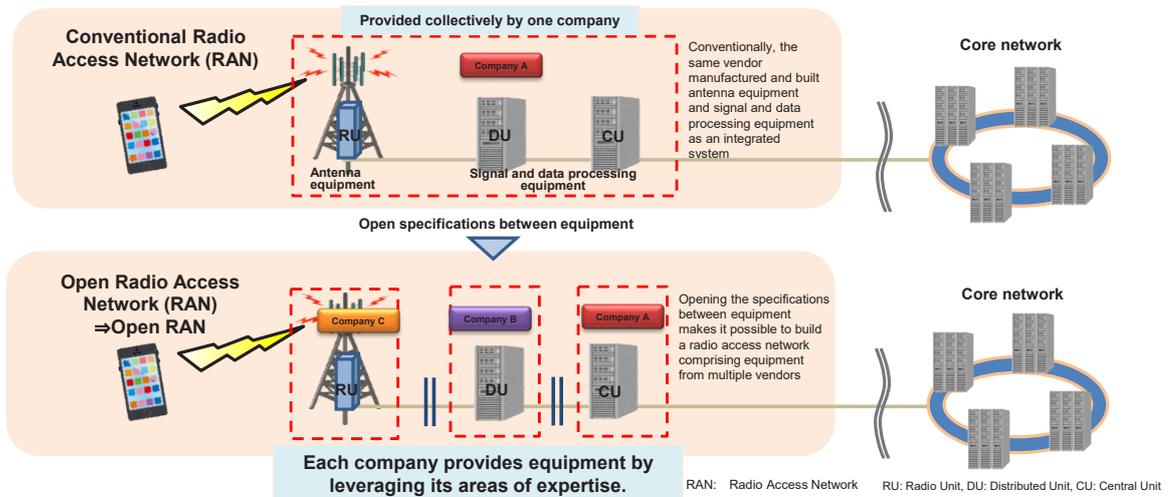


(Source) Omdia

In response, in order to foster the diversification of vendors in the 5G base station market, Japan and other like-minded countries, including the U.S., the U.K., Australia, India and Canada, have been encouraging diverse suppliers to participate in Open RAN for its promotion, which is attracting attention as a technology to ensure network transparency while enhancing supply chain re-

silience, generating innovations including those related to security, and promoting competition in the base station market. The MIC is supporting demonstration projects and business activities under the overseas digital deployment support program, with a view to gaining international understanding about the benefits of Open RAN towards the launch of specific projects.

Figure 3: Overview of Open RAN



Specifically, for collaboration with the U.S. and other like-minded countries for deployment in third countries, the MIC will carry out Open RAN-related field trials in Manila, the Philippines, as agreed at the Japan-U.S.-Philippines Summit meeting, foster collaboration for the launch of spe-

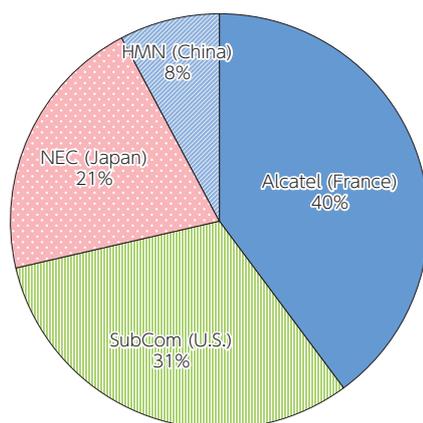
cific cooperation projects between like-minded countries, including providing support for Asia Open RAN Academy, and participate in and host international events with like-minded countries, such as the International Open RAN Symposium.

(2) Submarine cables

As for the world's submarine cable market, unlike the situation regarding 5G base stations, three companies based in developed countries are dominating the market, collectively accounting for 92% of orders received in terms of the cumulative total length of cables installed during the period from 2011 to 2024, with SubCom of the

U.S. holding about 31%, Alcatel Submarine Networks of France about 40%, and NEC of Japan about 21%. However, HMN Tech of China also has an 8% share, rapidly expanding its market presence, particularly in developing countries (Figure 4).

Figure 4: Market shares of suppliers in terms of the cumulative total length of cables installed during the period from 2011 to 2024



(Source) Created based on TeleGeography

In the submarine cable market, it is difficult to continue to receive orders in a stable manner, as orders for new installation tend to be unstable. Also, due to recent surges in the prices of materials and personnel expenses, even companies dominating the market are facing high business risks. Under these circumstances, Japanese companies are facing the challenge of securing their international competitiveness.

SubCom of the U.S. was acquired by Cerberus Capital Management, which is a U.S. fund making investments in defense contractors and national security assets, and the management team was replaced in 2018. Since the 2020s, SubCom has been successfully restructuring its business, serving Google as its major customer. For example, among the top 10 submarine cable installation projects for which Google placed orders for cables in and after 2019, SubCom won orders in six projects.

For Alcatel of France, it used to be a 100% subsidiary

of Nokia of Finland, but the parent company announced the sale of this subsidiary to the Government of France in June 2024, and Alcatel is now in the process of stabilizing management as a state-owned company.

Under these circumstances, it is necessary to decide whether it is appropriate to expect Japanese companies alone to enhance their profitability through their own efforts and determine how to ensure business continuity when a company finds their business unprofitable but the national government deems it unacceptable for the company to withdraw from the business. In reference to cases in other countries, the MIC will examine measures to support Japanese companies in building strong partnerships with stable customers, such as hyperscalers and other relevant customers and enhancing their ability to produce and install cables and provide maintenance services for the installed cables.