Outline of the 2026 White Paper on Information and Communications in Japan

July 2026

Ministry of Internal Affairs and Communications (MIC), Japan

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Part 1: Special Feature: Multifaceted Impacts of the Advancement in AI—Toward Achieving a Digital Society Where Humans and AI Soundly Cooperate—

In 2025, the Act on Promotion of Research and Development, and Utilization of Artificial Intelligence-related Technology (the AI Act) was enacted and put into effect, and various initiatives to develop and utilize AI are being implemented both in the public and private sectors. Against such a background, this year's White Paper on Information and Communications in Japan **focuses on the utilization of AI** in its special feature, and intends to **envision a digital society where humans and AI soundly cooperate** through analyzing data, including the results of international questionnaire surveys targeting individuals and companies, and overviewing concrete examples of AI utilization by companies, the results of an interview survey with companies implementing pioneering initiatives, the trends of the latest studies on AI use.

- Introduction
- Chapter 1 AI Use by Individuals—Behavioral Changes Caused by AI—
- Chapter 2 Progress of AI Use by Companies, etc.—Toward Better Utilization of AI—
- Chapter 3 Challenges Accompanying the Advancement of AI and Responses—Toward Sound Cooperation between Humans and AI—

Part 2: Current Status and Challenges for Information and Communications

Part 2 overviews information and communications market trends and the current status of use of digital technologies, and summarizes current information and communications policy initiatives.

Chapter 1 Trends in the ICT Market

- Chapter 1 reviews and analyzes the current situation of the ICT industry in Japan and the rest of the world and relevant markets (e.g., telecommunications, broadcast content, and applications).
- It also reviews and analyzes the current status of use of digital technologies in national life, business activities, and the public sector in Japan and the rest of the world.

Chapter 2 ICT Policy Initiatives by the MIC

- Chapter 2 summarizes ministry-wide ICT policy initiatives and the ministry's policies and their future directions in each of the ICT policy domains (telecommunications, radio policy, broadcasting policy, etc.).

Data collection: Relevant data from Part 1 and Part 2 are posted on the MIC website.

(*) In principle, figures are indicated after rounding fractions, and therefore, totals do not necessarily match breakdown aggregations.

Part 1: Special Feature: Multifaceted Impacts of the Advancement in AI

—Toward Achieving a Digital Society Where Humans and AI Soundly Cooperate—

(Reference) Questionnaire Surveys

Questionnaire survey targeting individuals

- Survey method: Online questionnaire survey
- Survey period: January–February 2026
- Target: Respondents were selected from the survey company's registered panel, ensuring balanced age and gender distributions (evenly distributed).(*1 and *2)
- Number of valid responses: 1,236 for Japan; 624 each for the U.S., Germany, and China

(Unit: people)

	10s	20s	30s	40s	50s	60s	Total
Japan	206	206	206	206	206	206	1,236
U.S.	104	104	104	104	104	104	624
Germany	104	104	104	104	104	104	624
China	104	104	104	104	104	104	624
Total	518	518	518	518	518	518	3,108

Questionnaire survey targeting companies

- Survey method: Online questionnaire survey
- Survey period: January–February 2026
- Target: From among the survey company's registered panel, individuals who reside in each country, hold managerial or higher positions in companies with 10 or more employees and that initiated digitalization efforts by 2025, and possess a sufficient understanding of their company-wide strategies and other related matters were selected as survey respondents.(*3)
- Number of valid responses: 515 for Japan; 309 each for the U.S., Germany, and China

(Unit: people (companies))

	Large companies	SMEs	Total
Japan	353	162	515
U.S.	217	92	309
Germany	211	98	309
China	250	59	309
Total	1,031	411	1,442

(*1) Other attributes (such as areas of residency [urban areas/local areas]) may be subject to restrictions due to the composition of the survey company's registered panel.

(*2) From the perspective of securing a sufficient number of samples from the survey company's registered panel, respondents aged 14 or younger and aged 70 or older were excluded.

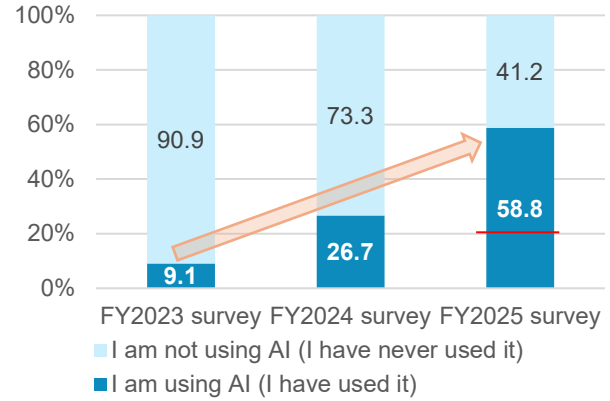
(*3) Based on the definition of small and medium enterprises (SMEs) provided by the Small and Medium Enterprise Agency and the results of last year's commissioned survey, companies in the manufacturing, construction, electricity/gas/heat/water supply, finance/insurance, real estate/leasing, transportation/postal services, and information and communications industries with 300 or more employees were classified as large companies, while those with fewer than 300 employees were classified as SMEs. Companies in the wholesale/retail trade and service/other sectors with 100 or more employees were classified as large companies, while those with fewer than 100 employees were classified as SMEs.

AI Use by Individuals—Behavioral Changes Caused by AI—

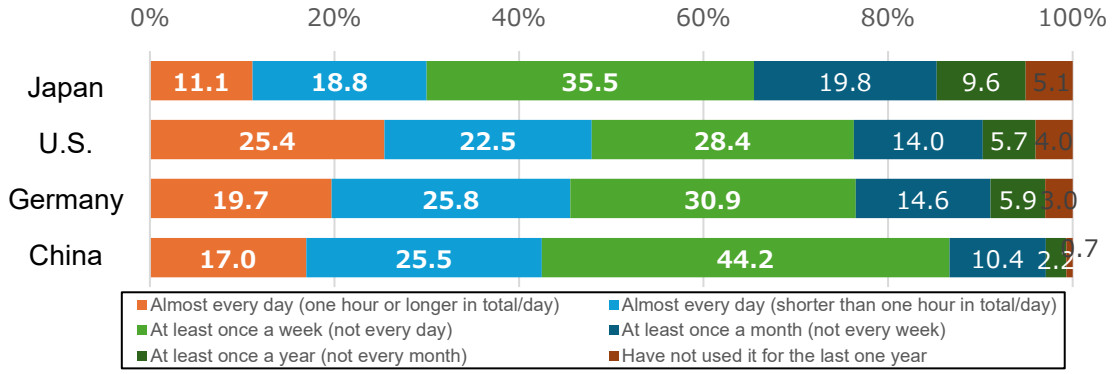
- The percentage of individuals who have used generative AI in Japan is lower than in the other three countries, but **reached 58.8% in the FY2025 survey,* having increased significantly from 26.7% at the time of the FY2024 survey**. On the other hand, for AI services other than services for generating text, such as image/video generation services, the relevant percentage still remains low in Japan.
- The percentage of individuals who responded that they use generative AI "almost every day" was around 30% in Japan. When limiting to those who responded that they use generative AI "for one hour or longer almost every day," the percentage was a little over 10%.

* The FY2023 survey and the FY2024 survey only covered those aged 20 or older, but the FY2025 survey additionally included those aged 15 to 19 in the survey targets. In the FY2025 survey, the percentage of individuals aged 20 or older who have used generative AI was 52.2%.

Experience using generative AI services in Japan (overall)

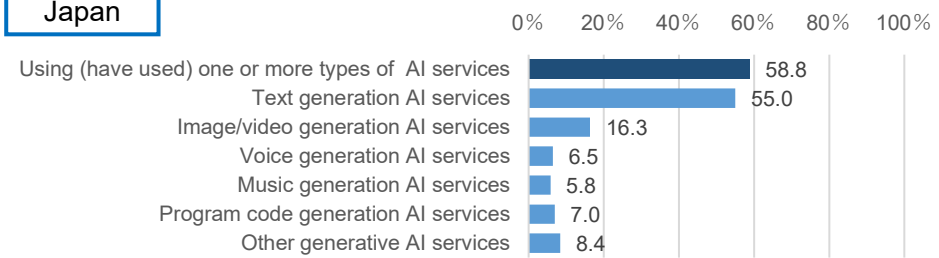


Frequency of using generative AI services (by country)

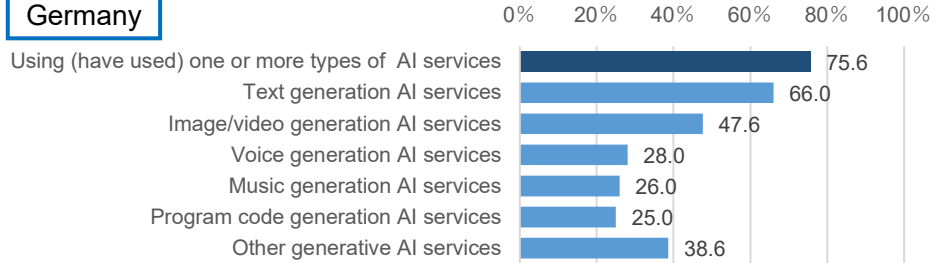


Experience using generative AI services (by country)

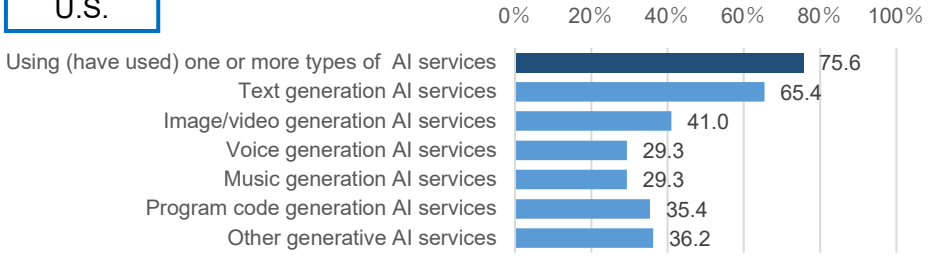
Japan



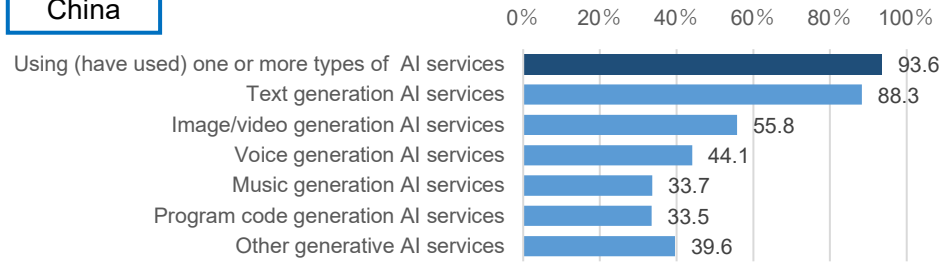
Germany



U.S.

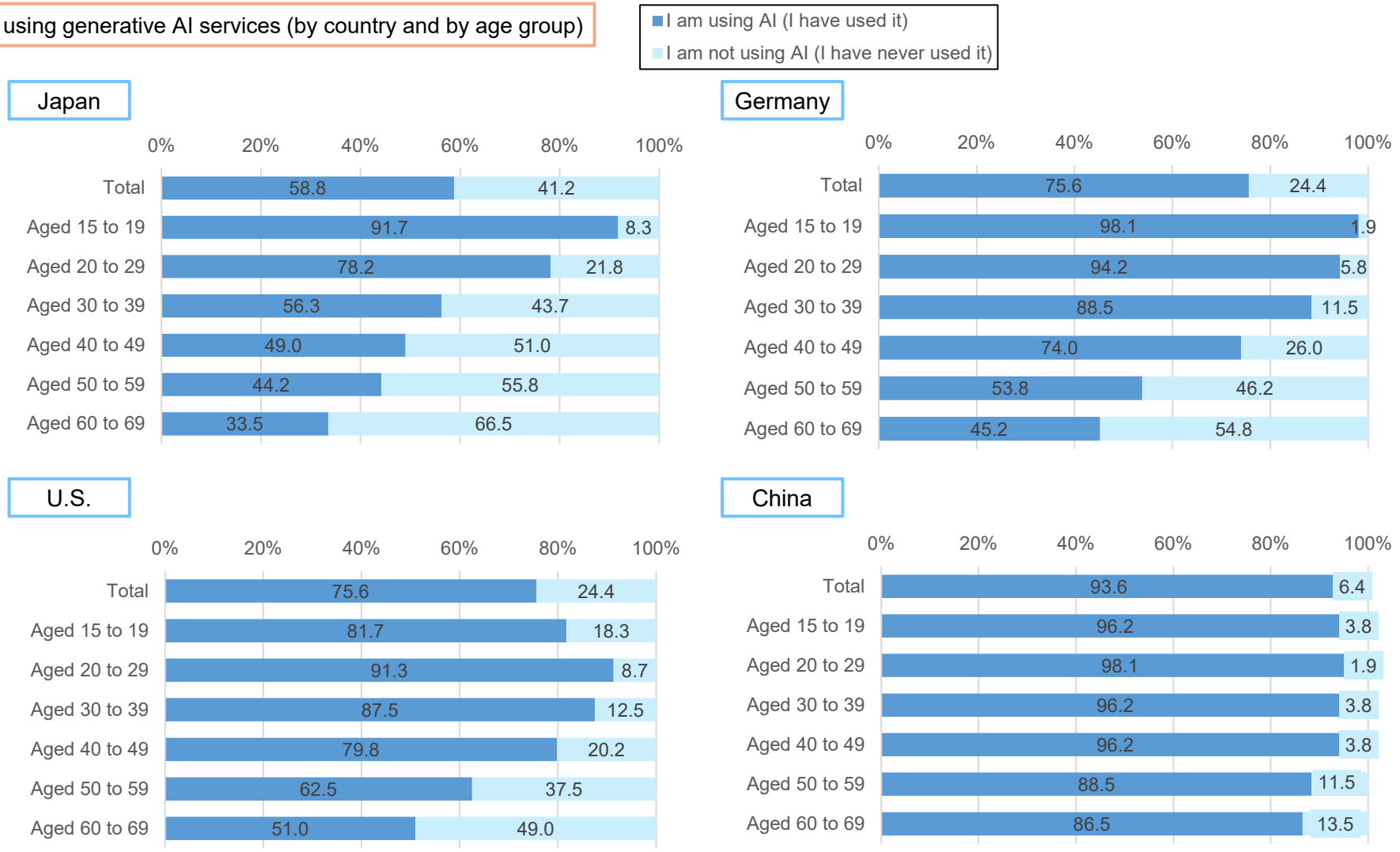


China



- Examining the status of use of generative AI by age group, in Japan, the percentage of individuals who have used generative AI was the highest for those aged 15 to 19, followed by those aged 20 to 29 and those aged 30 to 39. In the other three countries as well, **the percentages of those who have used generative AI are apt to be high mainly among young people**, such as those aged 15 to 19 or those aged 20 to 29.

Experience using generative AI services (by country and by age group)



- Regarding how people view generative AI, when asked what generative AI means to respondents, the most frequent response in Japan, the U.S., and Germany was “a machine or a tool,” while the highest percentage of respondents in China answered that they see generative AI as “a secretary or an assistant.” **The second highest percentages of respondents selected “A dictionary or an encyclopedia” in Japan, “A friend” in the U.S. and China, and “A counselor” in Germany**. It is suggested that in the three countries where the generative AI usage rates are high, a considerable number of people see generative AI as a companion to share feelings with, such as “a friend” or “a counselor,” not only as “a machine or a tool” or “a secretary or an assistant.”

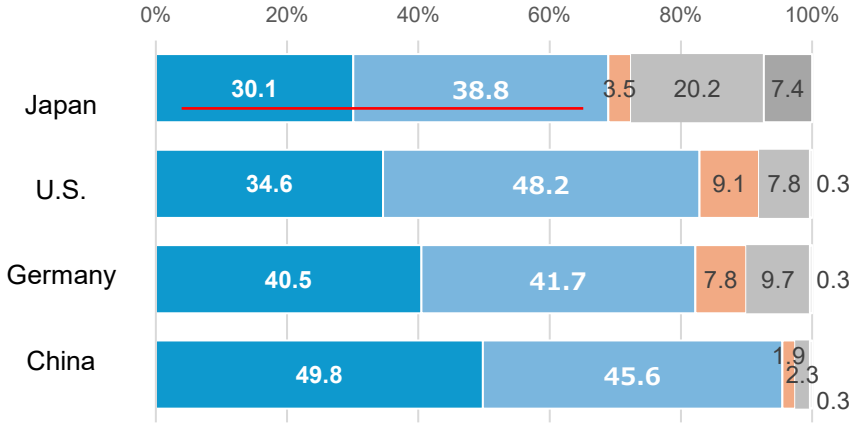
How people view generative AI [ii] (What generative AI means to you?) (by country)

No.	Japan		U.S.		Germany		China	
1	A machine or a tool	38.3	A machine or a tool	46.0	A machine or a tool	43.3	A secretary or an assistant	44.7
2	A dictionary or an encyclopedia	28.9	A friend	25.3	A counselor	41.0	A friend	39.9
3	A secretary or an assistant	21.4	A dictionary or an encyclopedia	24.5	A dictionary or an encyclopedia	28.8	A counselor	38.1
4	A counselor	12.9	A family member	21.5	A secretary or an assistant	22.8	A dictionary or an encyclopedia	26.9
5	A teacher or a coach	12.9	A secretary or an assistant	19.6	A colleague	14.3	A family member	22.1
6	A friend	10.9	A teacher or a coach	16.0	A friend	14.1	A machine or a tool	21.2
7	An alter ego or a part that strengthens or expands me	10.9	A counselor	11.5	A teacher or a coach	12.7	A colleague	20.7
8	A family member	6.2	A colleague	10.6	A family member	12.5	An alter ego or a part that strengthens or expands me	19.1
9	Other	5.3	An alter ego or a part that strengthens or expands me	9.1	An alter ego or a part that strengthens or expands me	7.2	A teacher or a coach	16.2
10	A colleague	4.0	A romantic partner	9.0	A romantic partner	6.1	A romantic partner	6.6
11	A romantic partner	2.8	Other	6.6	Other	5.8	Other	0.0

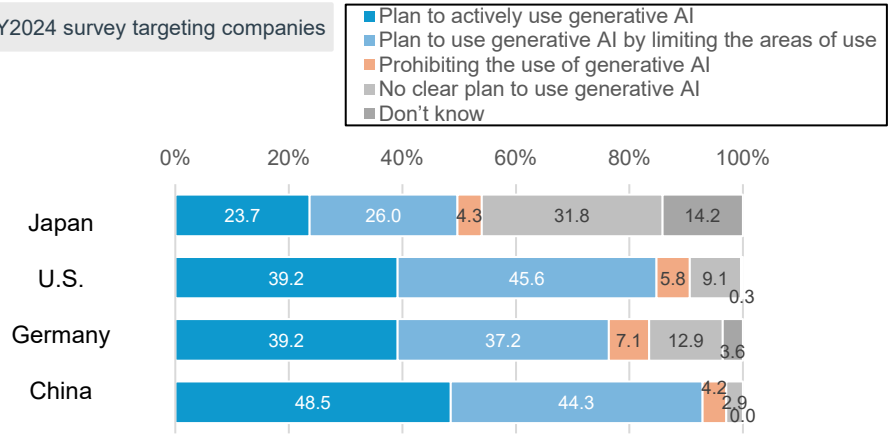
Progress of AI Use by Companies, etc.—Toward Better Utilization of AI—

- The total percentage of respondents who selected, as their company's policy of utilizing generative AI, "Plan to actively use generative AI" or "Plan to use generative AI by limiting the areas of use" was lower in Japan than in the other three countries, but **reached 68.9% in the FY2025 survey, having increased significantly from 49.7% at the time of the FY2024 survey**.
- Furthermore, in response to a question about the current status of utilizing generative AI, the percentage of respondents in Japan who answered that they are using generative AI for some kind of work was 86.4%, showing a significant increase from the percentage in the FY2024 survey, and the gap from the other three countries diminished.

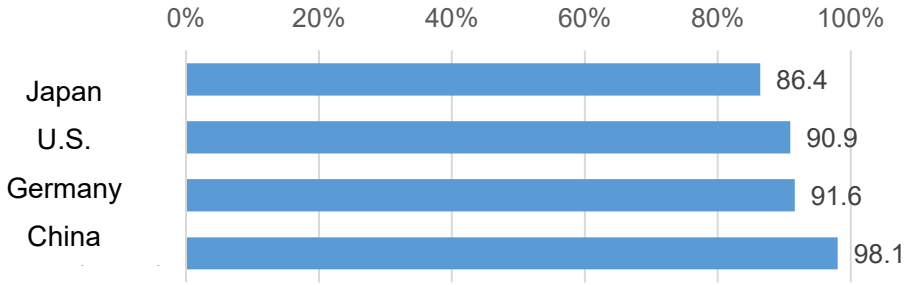
Status of policy formulation for using generative AI (by country)



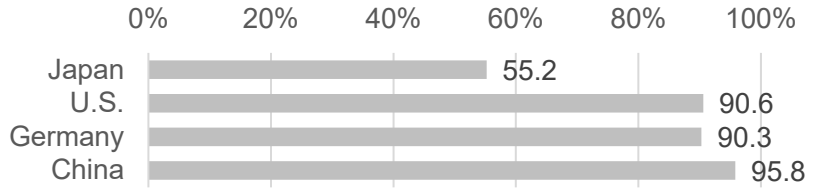
(Reference) FY2024 survey targeting companies



Percentage of using generative AI for business in companies (by country)



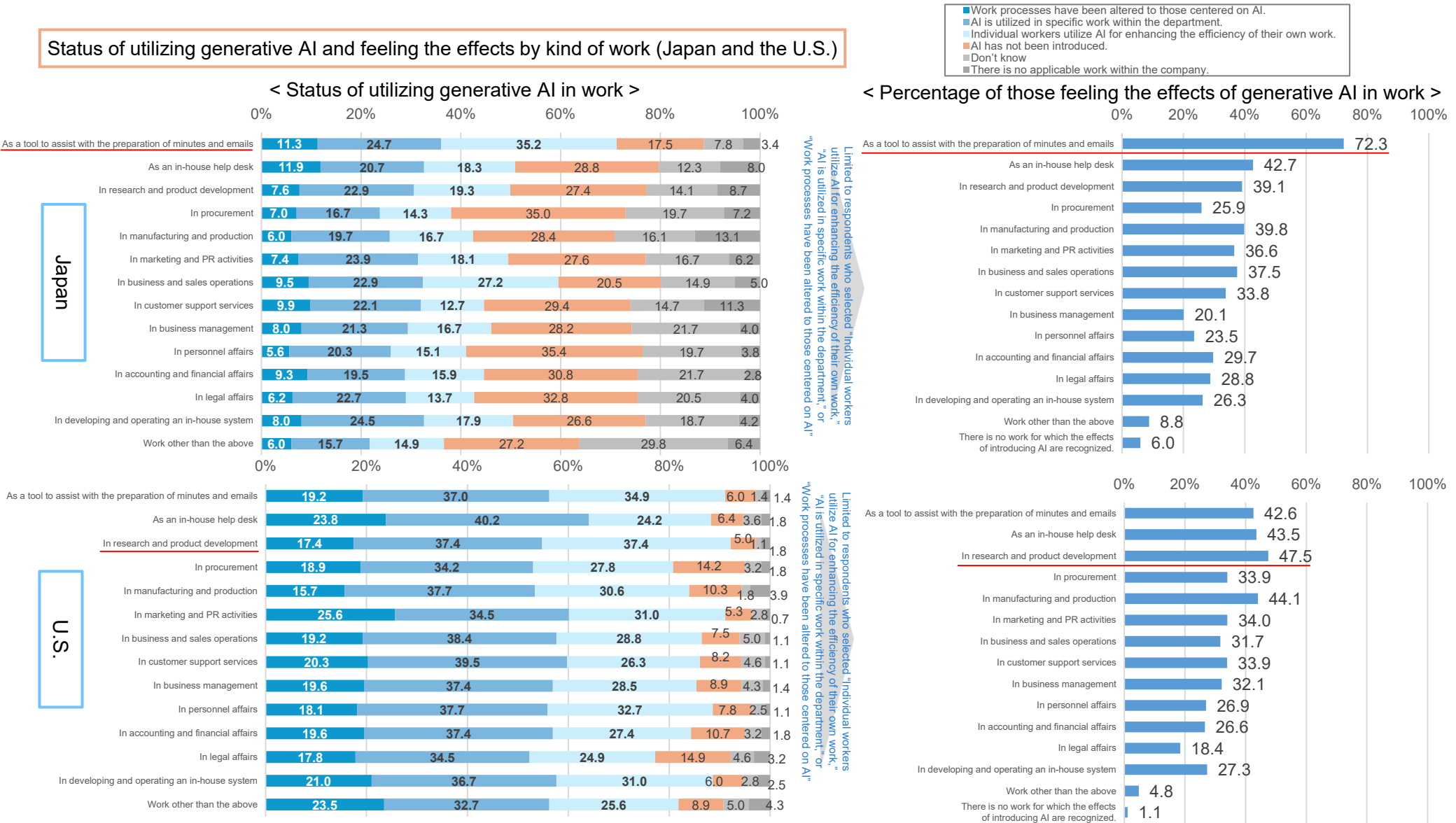
(Reference) FY2024 survey targeting companies



Progress of AI Use by Companies, etc.—Toward Better Utilization of AI—

- With regard to the status of utilization of generative AI by kind of work, **the percentage of respondents in Japan who selected "As a tool to assist with the preparation of minutes and emails" was the highest, at around 70%, as was the percentage of those who answered that they feel the effects of introducing generative AI**. In the U.S., the utilization rates were generally high for all kinds of work, and the percentage of respondents who answered that they feel the effects in "research and product development" was high.

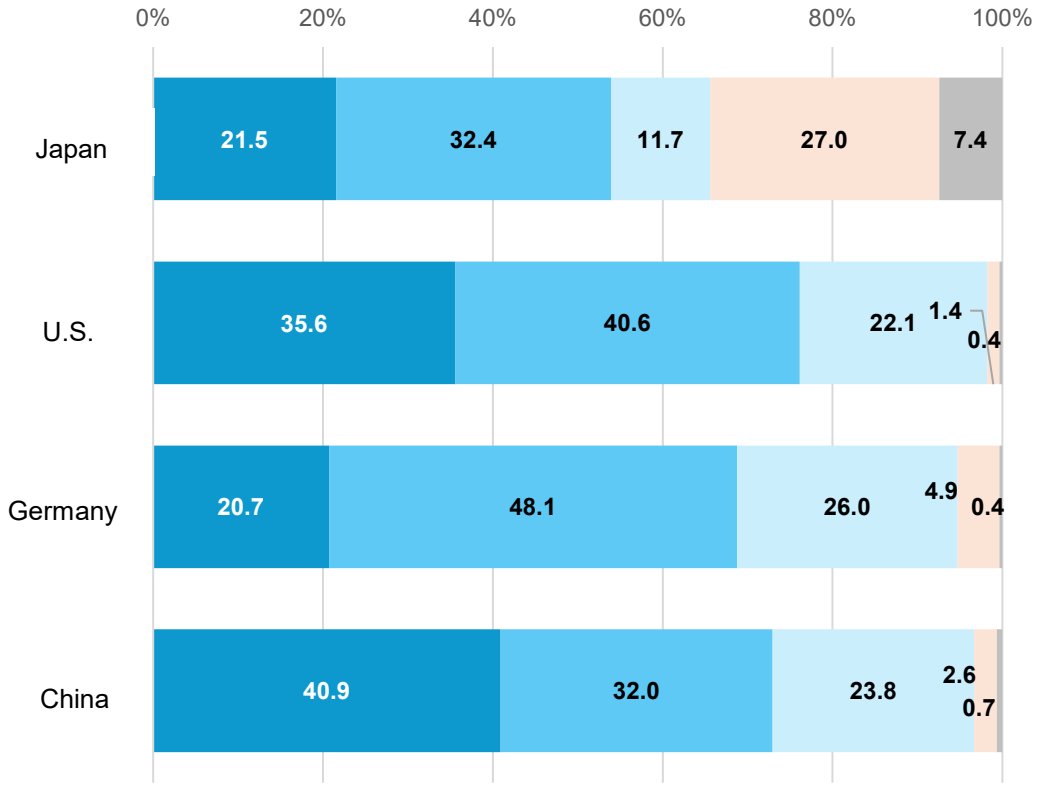
Status of utilizing generative AI and feeling the effects by kind of work (Japan and the U.S.)



Progress of AI Use by Companies, etc.—Toward Better Utilization of AI—

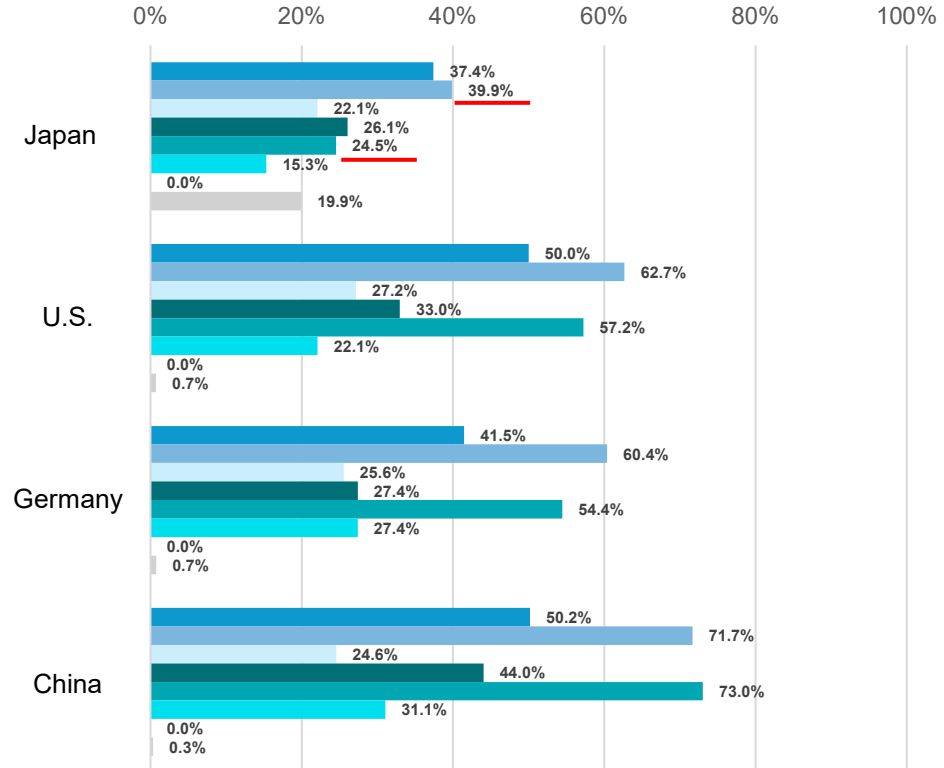
- When asked about transformation of business operations through the utilization of generative AI, **nearly 30%** of respondents in Japan answered that "**organizational efforts have not been made**." This percentage was higher than in the other three countries.
- As for the status of environmental development for transformation of business operations, the percentages of respondents who answered that "**a favorable environment has been developed for gaining the skills and knowhow** necessary for reviewing work processes and considering the utilization of generative AI" or "workers **train** generative AI **on in-house data** and **have created a database** that generative AI can refer to" was **considerably lower in Japan than in the other three countries**.

Status of organizational efforts relating to the transformation of business operations by the use of generative AI (by country)



- Company-wide efforts are being made for achieving business transformation and innovation.
- Individual departments are making efforts to optimize business operations and value improvement (but not on a company-wide basis).
- Efforts are being made in an organized manner to enhance the productivity of individuals in conducting research and preparing documents, etc. (but still falling short of transforming business operations).
- Organizational efforts have not been made.
- Don't know

Status of environmental development relating to the transformation of business operations by the use of generative AI (by country)



- Budgets and personnel for considering the utilization of generative AI have been secured.
- A favorable environment has been developed for gaining the skills and knowhow necessary for reviewing work processes and considering the utilization of generative AI.
- A system for receiving advice or support from experts has been put in place.
- Analyzable and usable in-house data is being developed.
- Workers train generative AI on in-house data and are creating a database that generative AI can refer to.
- A technological environment has been developed to enable workers to develop apps and AI agents by utilizing generative AI.
- Other
- No specific measures are being taken or are ascertained.

Progress of AI Use by Companies, etc.—Toward Better Utilization of AI—

- Implications obtained from the interview survey with companies implementing pioneering initiatives and experts
  - **A company's top management recognizes the effectiveness of AI and proactively communicates information internally and externally**. The top management clarifies the domains where AI should be utilized preferentially.
    (Comment by an expert) Top management in general should consider AI not as a cost but as an intangible asset for which knowhow and knowledge accumulate over time and whose value improves.
  - A company is advancing the **fundamental transformation of business operations premised on the utilization of AI**, and prioritizes designing the division of roles between humans and AI.
  - A company **started deliberations based on the needs and the awareness of issues on the front lines of the business department**, and the DX promotion department has been offering hands-on support.
  - A company developed a common base that enables the utilization of the latest AI technologies, and at the same time, has been promoting a link with in-house systems and data.
  - A company is promoting the fostering of human resources, the development of policies and guidelines for using AI, and the creation of an evaluation mechanism.

Examples of companies implementing a pioneering initiative by utilizing AI (interview survey)

Case of Chugai Pharmaceutical Co., Ltd.
(large company; pharmaceutical business)

- With the awareness of the crisis regarding the possibility of being disrupted in a competitive environment, the management team has clarified its stance of proactively utilizing AI.
- The company established staged strategies, starting from the use of general-purpose generative AI to the transformation of business operations through the utilization of AI ("AI Everyday," "AI Everywhere," and "AI Transformation")
- Based on the needs of the business department, the DX promotion department works as a bridge to introduce the latest technologies.
- The company works on fostering human resources and facilitating the movement of human resources under a human resources development program, and also implements "Digital Innovation Lab," a program to create ideas with the participation of all employees.
- The company prioritizes AI governance based on the idea of "A Human in the Loop," which is an approach to properly involve humans in making judgments and confirmation in the process of utilizing AI.

Case of ainico group Co., Ltd.
(SME; real estate and nursing care businesses, etc.)

- The business owner had the awareness that there would be no future for the company unless it transitioned its working style into one premised on AI utilization, and started an intensive project for better utilizing AI.
- In that project, the company received hands-on support from a specialized company, set challenges that each business department needs to solve and targets based on their awareness of challenges, and conducted a review for one year while checking the progress periodically.
- As outcomes, it was reported that a total of 2,247 working hours were saved in one year by the company's ten business departments, through such efforts as creating a system to optimize transportation routes for service users (nursing care business department) and making a template for and automatizing responses to inquiries (real estate business department).
- Even before the introduction of AI, a practice to develop workflow and check sheets had been rooted in the company, and such corporate environment and culture of willingness to increase workflow efficiency and make improvements also worked effectively in promoting the utilization of AI tools.

Comment by an expert (Prof. SATOH Ichiro, National Institute of Informatics)

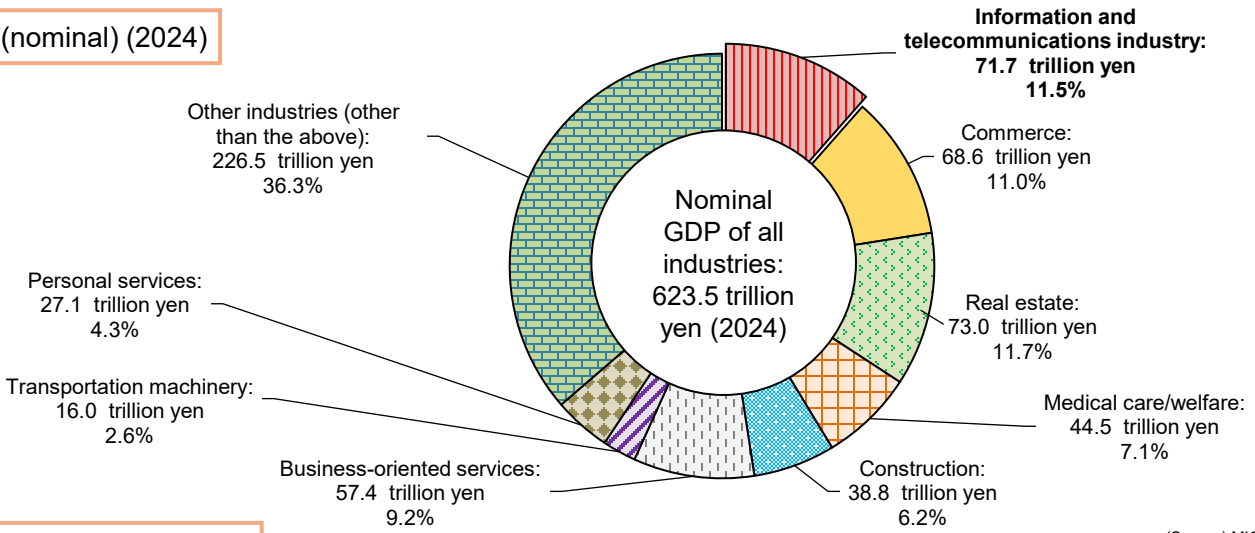
- Business managers should position AI not as a cost but as an asset, and should introduce AI as a tool for capitalizing knowhow and knowledge, instead of merely aiming to automatize workflow. AI makes it possible to do what was impossible in the past and to create new value. Through the utilization of AI, companies will be able to utilize knowledge, which has been accumulated on site or by individuals separately, on a company-wide basis as their intangible assets.
- When compiling knowledge, lessons, and knowhow into AI, the more you use AI, the more it accumulates knowledge, and you may be able to create AI whose value increases over time. Whether you can utilize AI in such a manner or not will determine the growth of the company into the future.

Part 2: Current Status and Challenges for Information and Communications

GDP of Major Industries (Nominal)

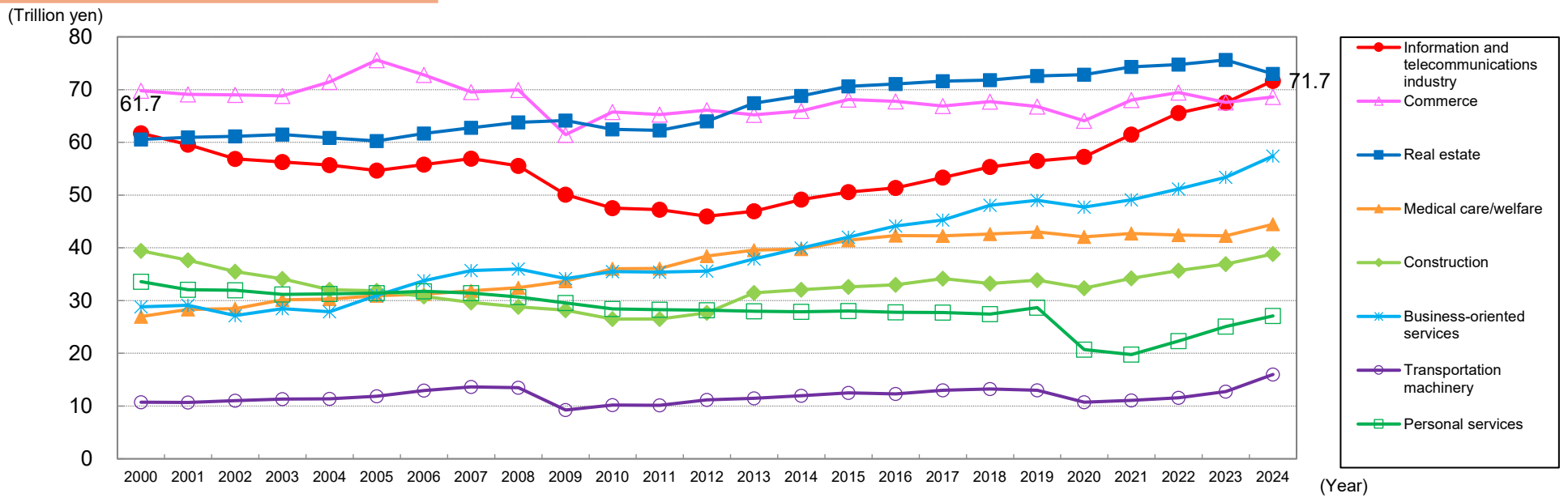
- The nominal GDP of the information and communications industry in 2024 was 71.7 trillion yen (estimation based on 2020 prices). The information and communications industry accounted for approx. 11.5% of the overall nominal GDP.

GDP of major industries (nominal) (2024)



(Source) MIC (2026) "Survey on Economic Analysis of ICT in FY2025"

Changes in nominal GDP of major industries

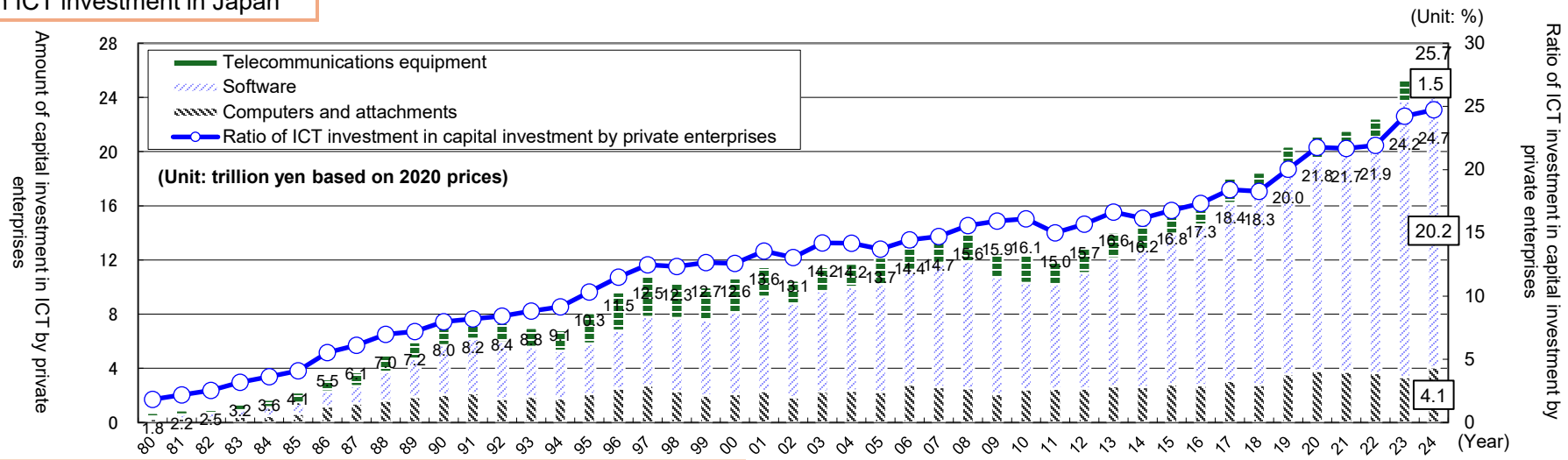


(Source) MIC (2026) "Survey on Economic Analysis of ICT in FY2025"

Changes in Private Sector ICT Investment

- In 2024, private sector ICT investment in Japan is estimated to be 25.7 trillion yen (based on 2020 prices), a 1.9% increase from the previous year. Software (custom development and packaged software) investment amounted to 20.2 trillion yen, which accounted for nearly 78% of the total.
- Comparing the changes in ICT investment between Japan and the U.S., ICT investment in the U.S. showed a steady increase despite temporary setbacks, while Japan's ICT investment continues to show a gradual increase or a flat trend.

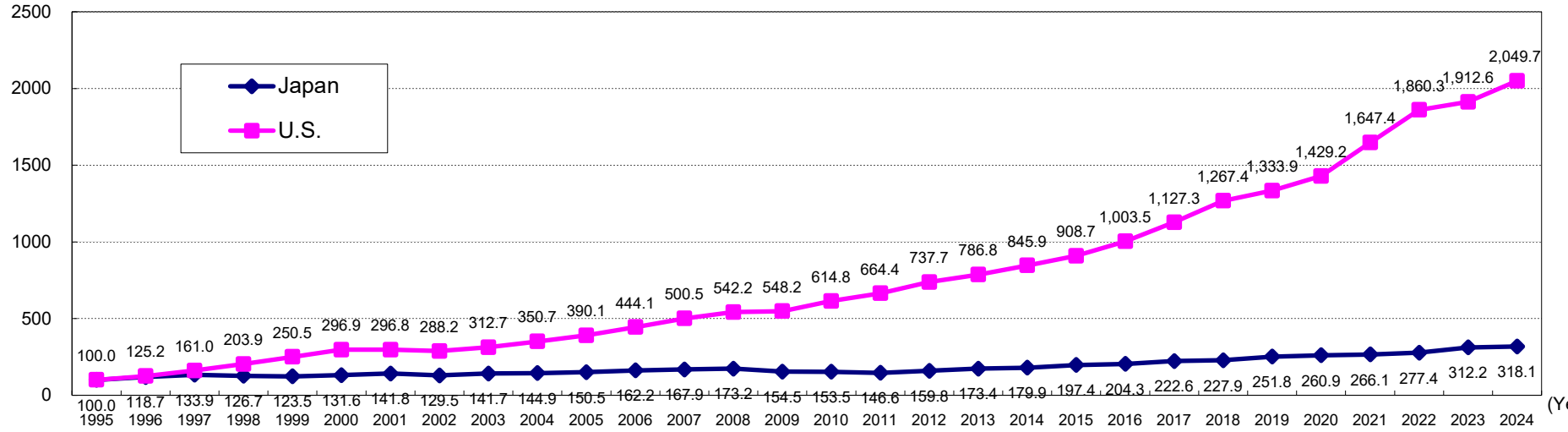
Changes in ICT investment in Japan



(Source) MIC (2026) "Survey on Economic Analysis of ICT in FY2025"

Comparison of ICT investment in the private sector in Japan and the U.S.

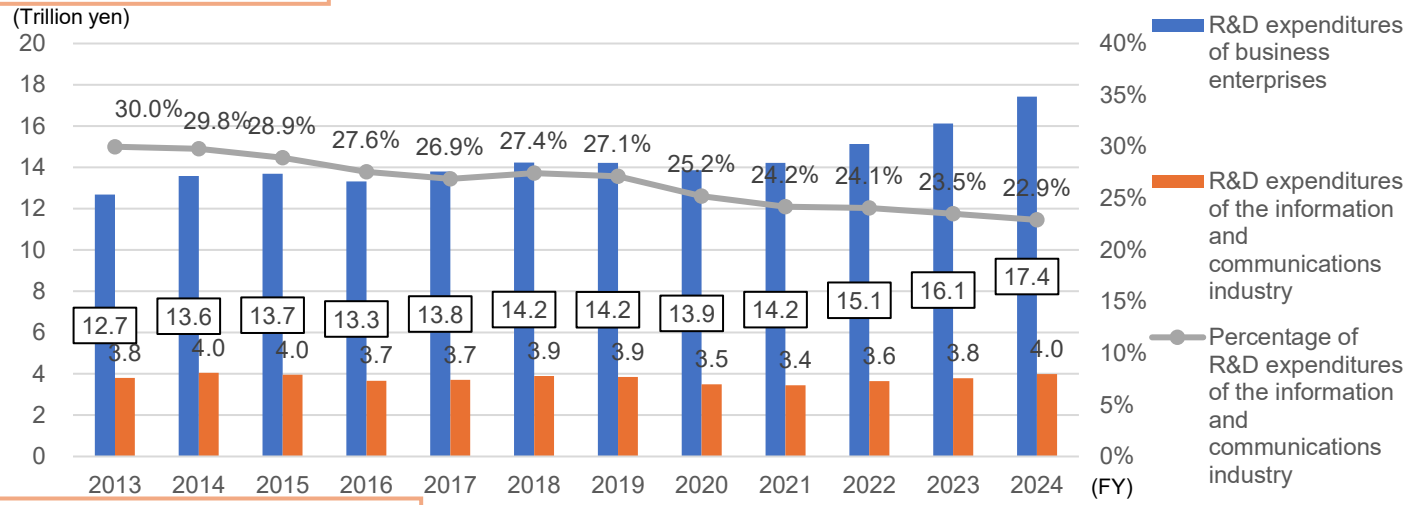
* Indexing year 1995 = 100 (Japan: prices in 2020, the U.S.: prices in 2017)



(Source) MIC (2026) "Survey on Economic Analysis of ICT in FY2025"

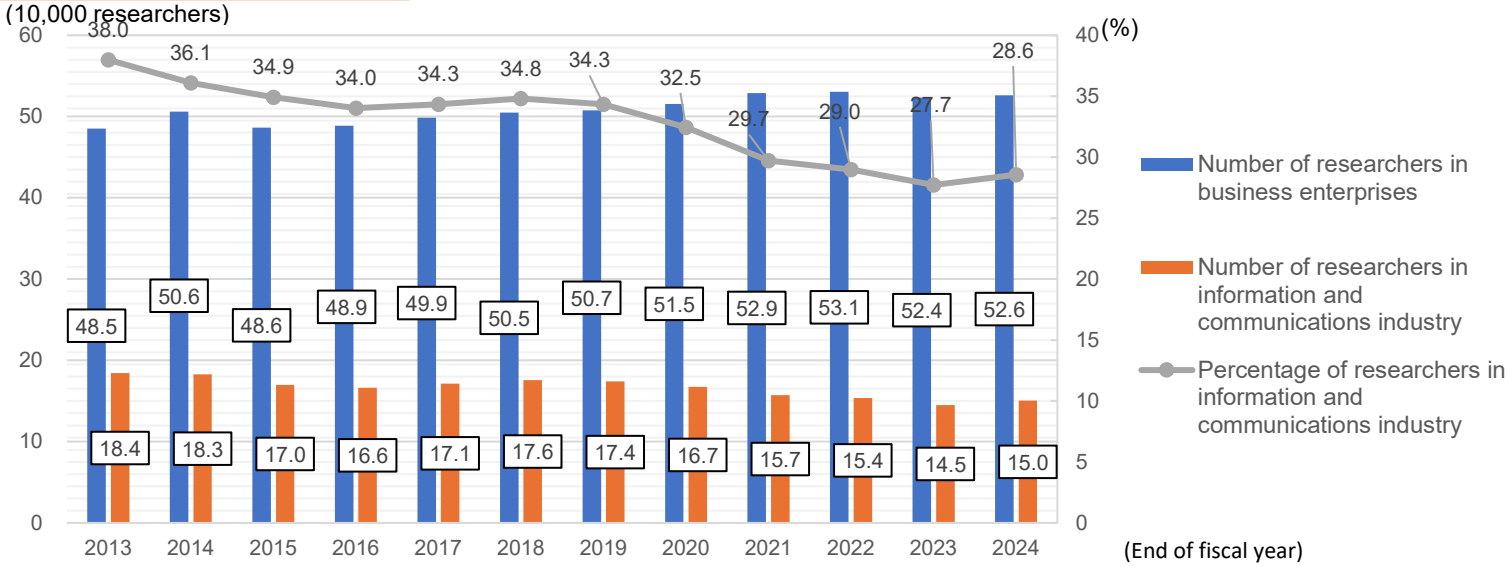
- Among R&D expenditures of business enterprises for FY2024, R&D expenditures in the information and communications industry were approx. 4.0 trillion yen (22.9%), showing a trend of stagnation or slight increase in recent years.
- Among researchers in business enterprises as of the end of FY2024, the number of researchers in the information and communications industry was approx. 150 thousand (28.6%). The number increased slightly after showing a declining trend in recent years.

Trend of R&D expenditures of business enterprises



(Source) Prepared based on MIC "Survey of Research and Development" for each fiscal year

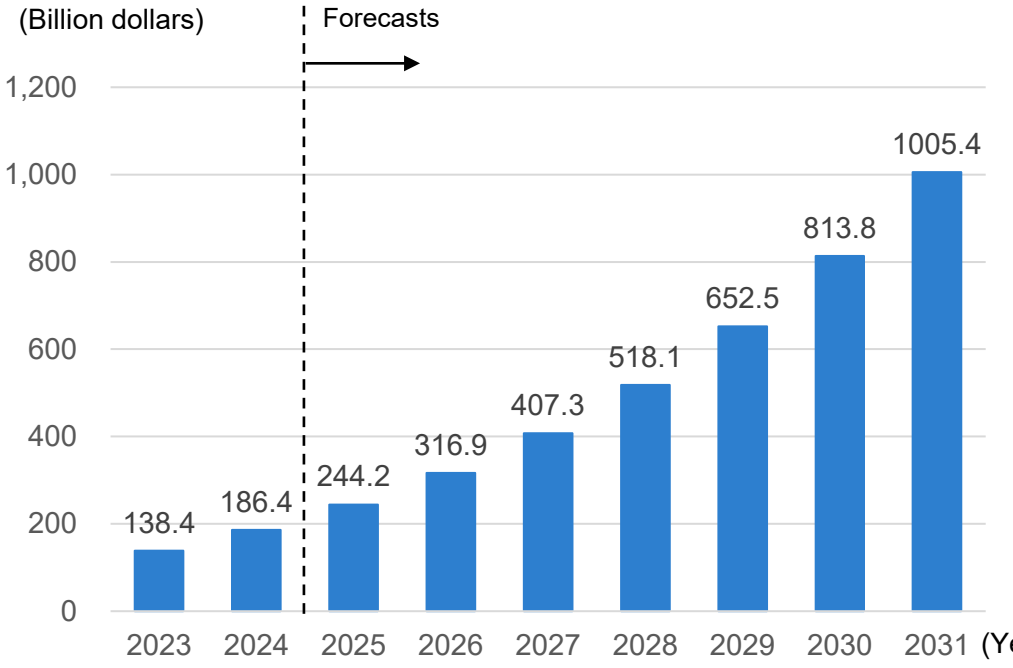
Trend in the number of researchers in business enterprises



(Source) Prepared based on MIC "Survey of Research and Development" for each fiscal year

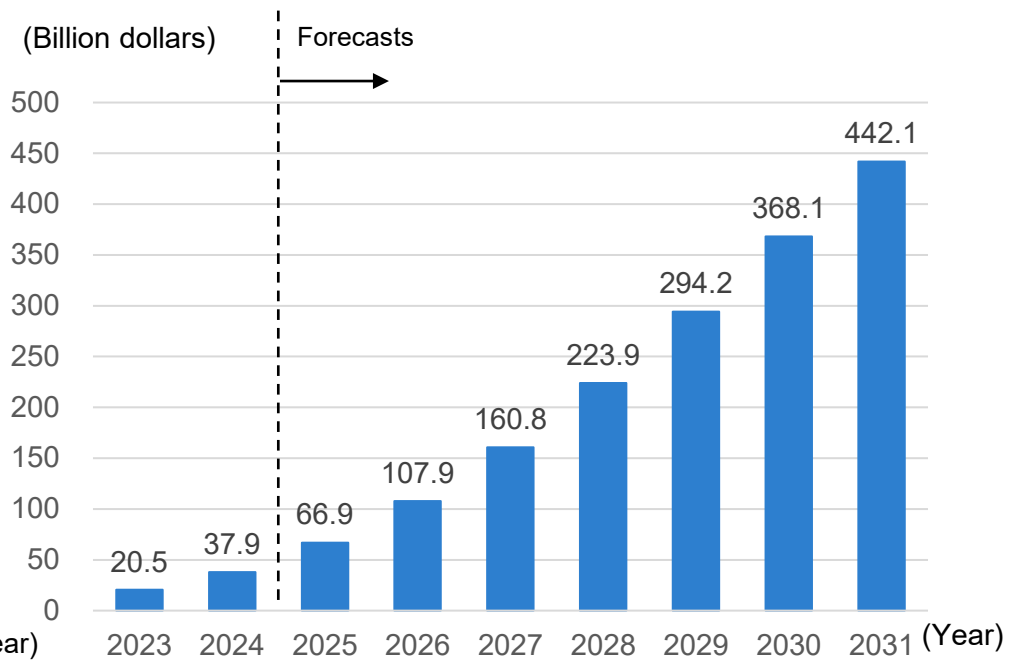
- The global AI market size is expected to expand to 244.2 billion dollars in 2025 and 1,005.4 billion dollars by 2031.
- The global generative AI market is expected to expand from 37.9 billion dollars in 2024 to 66.9 billion dollars (27.4% of the total AI market) in 2025 and to 442.1 billion dollars (44.0% of the same) by 2031.

Changes and forecasts of the size of the global AI market



(Source) Prepared based on Statista (data obtained on February 10, 2026)

Changes and forecasts of the size of the global generative AI market

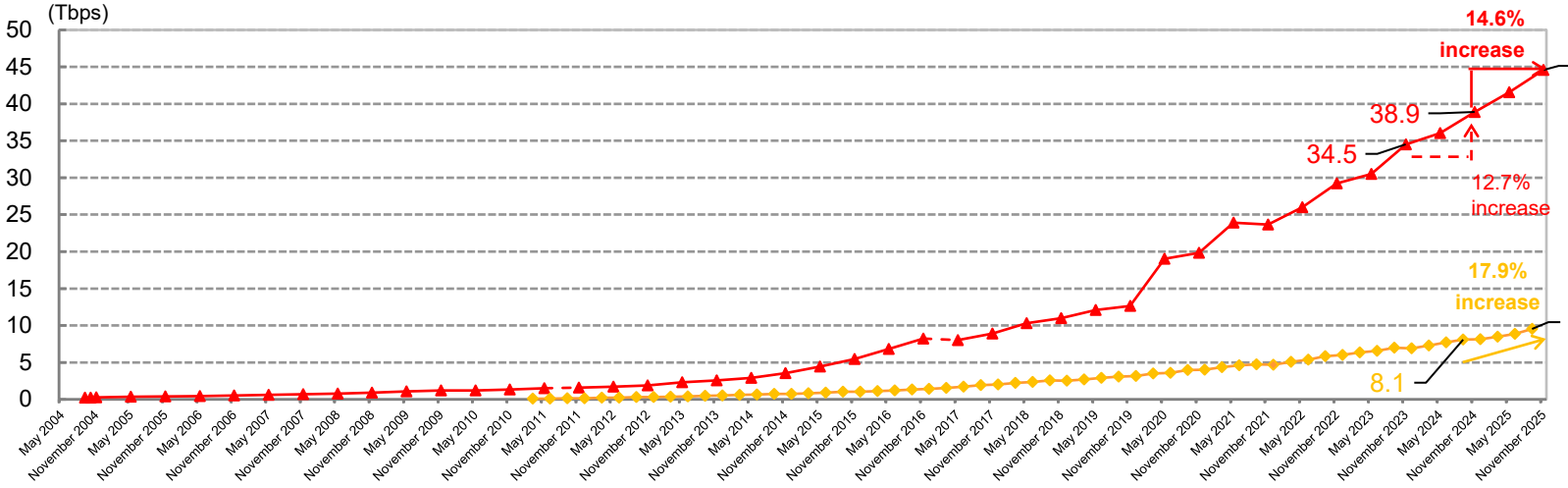


(Source) Prepared based on Statista (data obtained on February 10, 2026)

Changes in Internet Traffic (Fixed/Mobile Broadband, Download Traffic)

- The total download traffic of fixed broadband service subscribers in Japan experienced a sharp increase after the outbreak of the COVID-19 pandemic. Despite fluctuations in growth rates, it has generally continued to increase, reaching a 14.6% increase compared with the same month of the previous year as of November 2025. The total download traffic for mobile communication also continues to increase, with a 17.9% increase compared with the same month of the previous year as of September 2025.
- As of the end of December 2025, the number of fixed broadband subscriptions was 47.5 million (a 0.6% increase from the same period of the previous year). Among the subscriptions for mobile ultra-high-speed broadband, the number of 3.9-4th generation mobile phones (LTE) was 108.77 million (a 4.1% decrease from the same period of the previous year), 5th generation mobile phones was 122.42 million (a 14.3 % increase from the same period of the previous year), and BWA was 93.65 million (a 3.8% increase from the same period of the previous year).

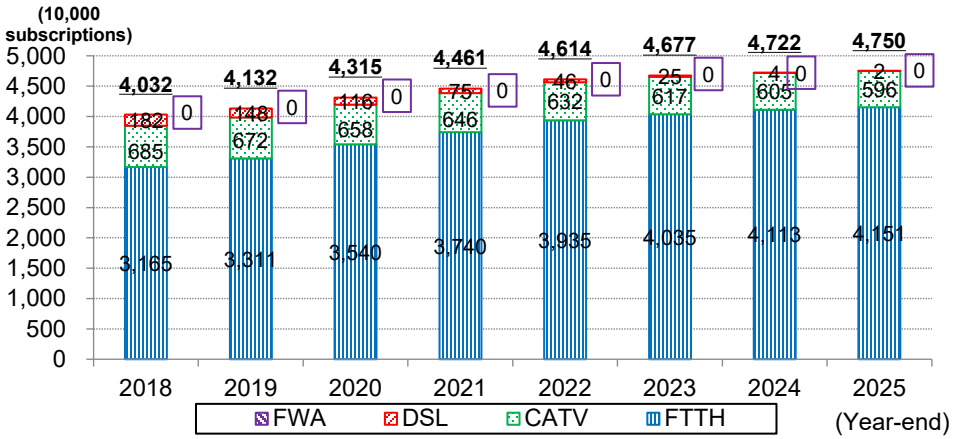
Changes in internet traffic (fixed/mobile Broadband, download traffic)

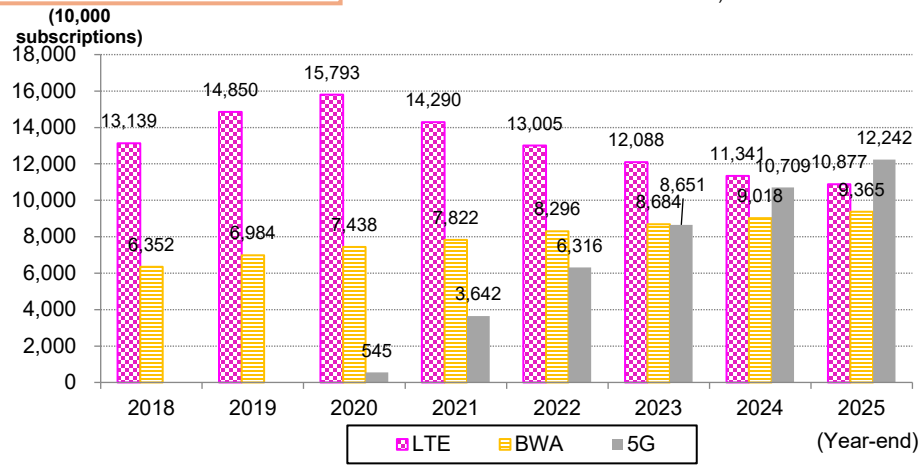


*1 Services for individuals (FTTH, DSL, CATV, and FWA)
*2 Including some corporations
*3 Up to May 2011, this also includes some mobile communications traffic to and from mobile phone networks.
*4 Since May 2017, the number of cooperating ISPs increased from five to nine, resulting in discontinuities due to aggregated and estimated values based on information from the nine ISPs
*5 From "MIC Current State of Mobile Communications Traffic in Japan (Sept. 2025)" (measured in March, June, Sept., and Dec.)

(Source) MIC (2026) "Aggregation Results of Traffic on the Internet in Japan (for November 2025)"

Changes in the number of broadband subscriptions (fixed broadband and mobile ultra-high-speed broadband)



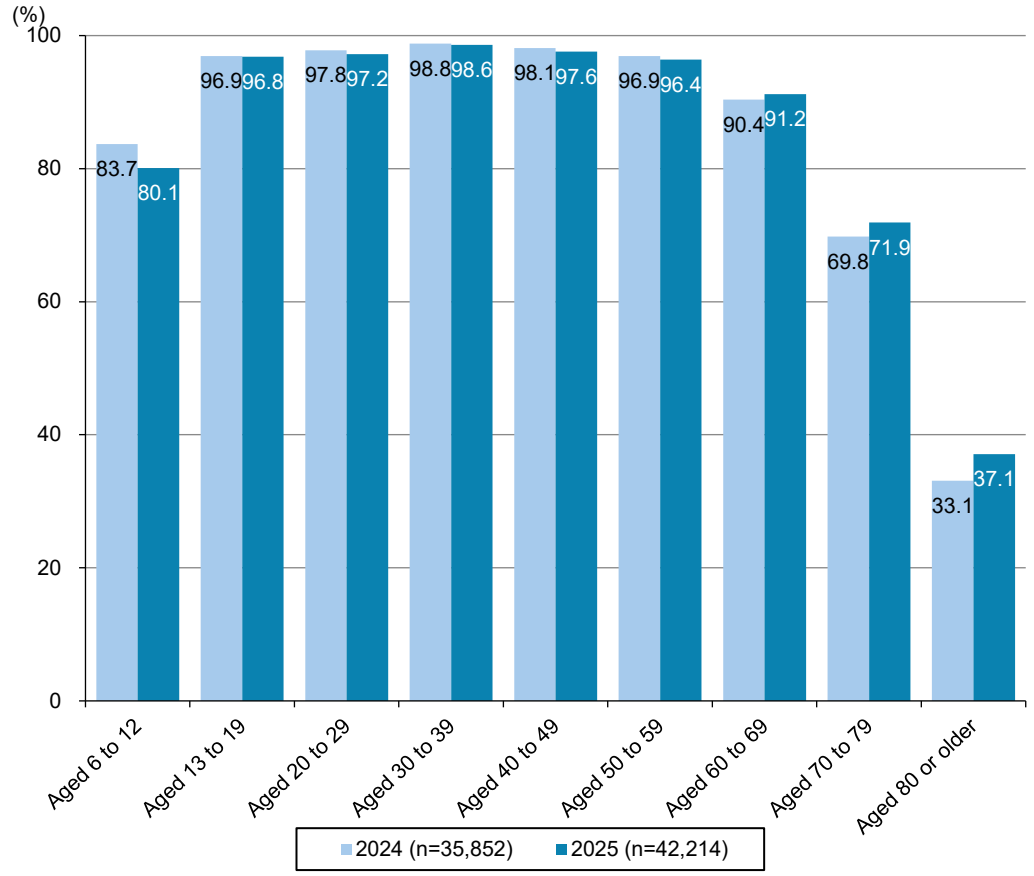


(Source) Prepared based on MIC "Publication of Quarterly Data on the Number of Subscriptions and Share of Telecommunications Services (Q3 of FY2025 (End of December))"
*The figures for past years differ from those published last year as some business operator reports were revised.

Trends in Use of Digital Technologies in the Daily Life of the Citizens (Internet Usage Status)

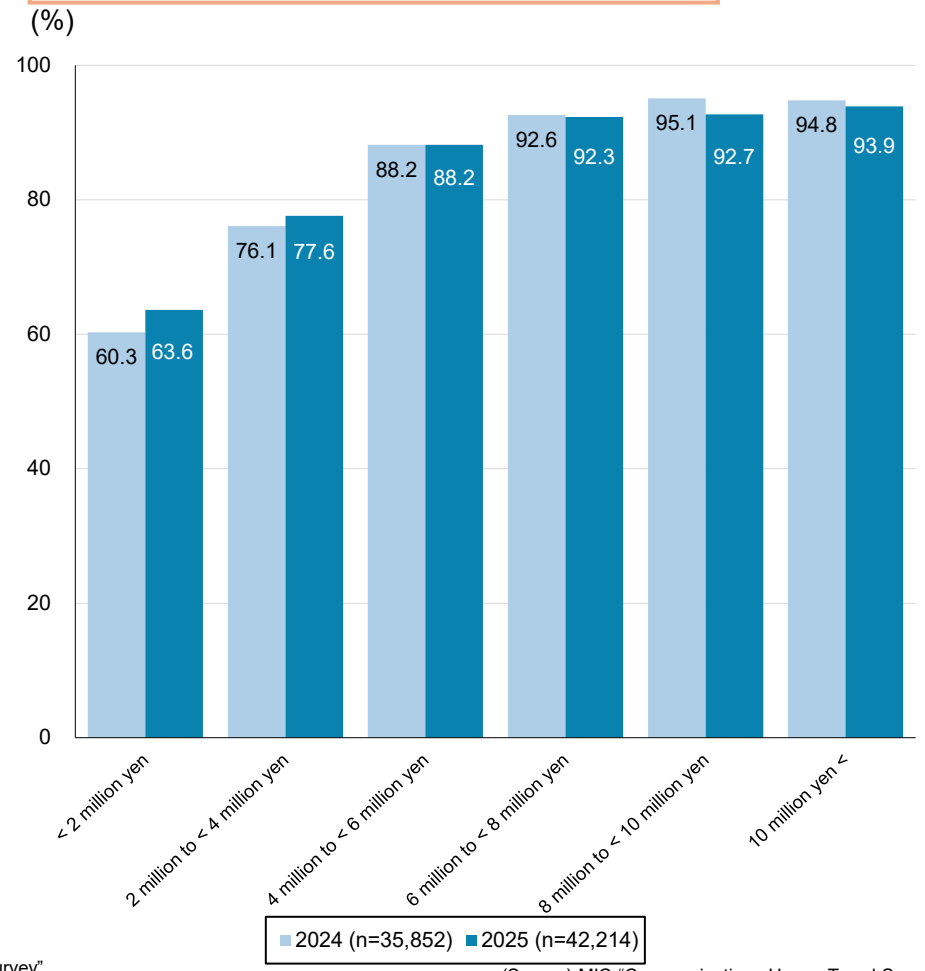
- Examining the internet usage rate by age group, it exceeds 90% for each group from ages 13 to 69, while it tends to decrease as the age group rises beyond 70 years old, but it exceeds 70% even for the group of those aged 70 to 79.
- Additionally, the internet usage rate by household income shows that it exceeds 80% for all income brackets above 4 million yen.

Internet usage rate by age group (individuals)



(Source) MIC “Communications Usage Trend Survey”

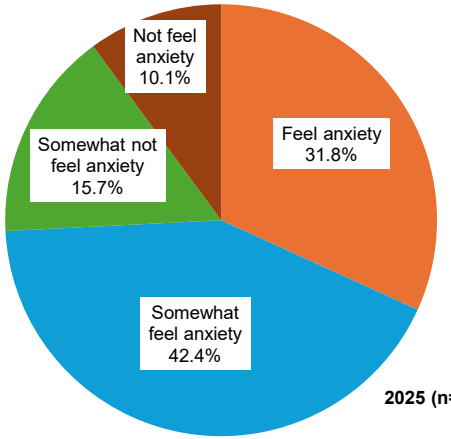
Internet usage rate by annual household income



(Source) MIC “Communications Usage Trend Survey”

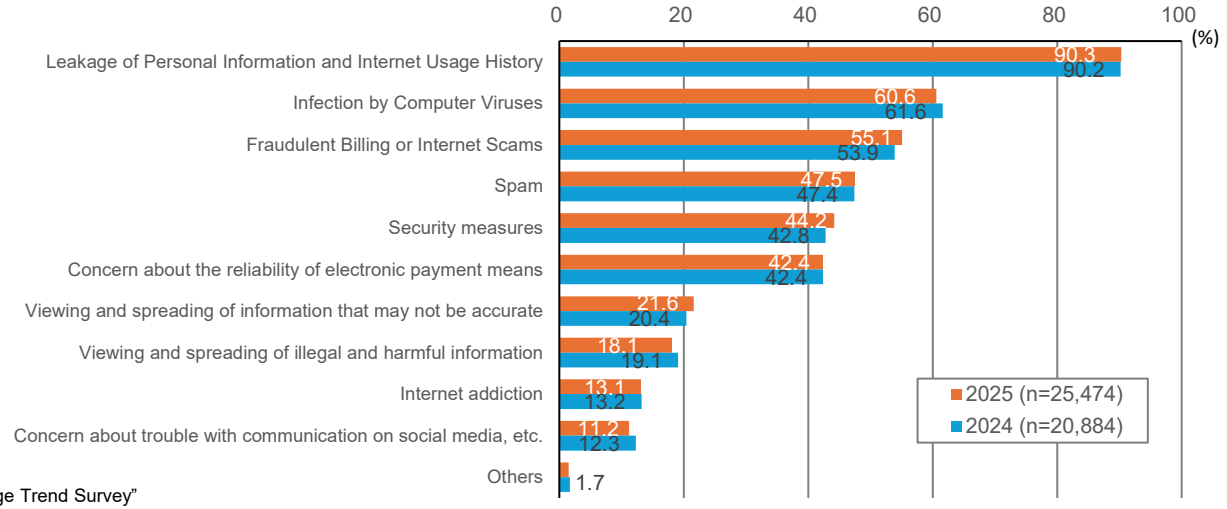
- Approximately 70% of internet users felt some form of anxiety when using the internet. The concerns included “leakage of personal information and internet usage history,” at 90.3%, followed by “infection by computer viruses,” at 60.6%, and “fraudulent billing or internet scams,” at 55.1%.
- Additionally, when asked whether they were aware of providing personal data when using services or applications offered by platform companies, the percentage of respondents who answered “very aware” or “somewhat aware” was highest in the U.S. (76.4%), while in Japan it was approx. 40% (44.7%).

Percentage of individuals who feel anxiety when using the internet



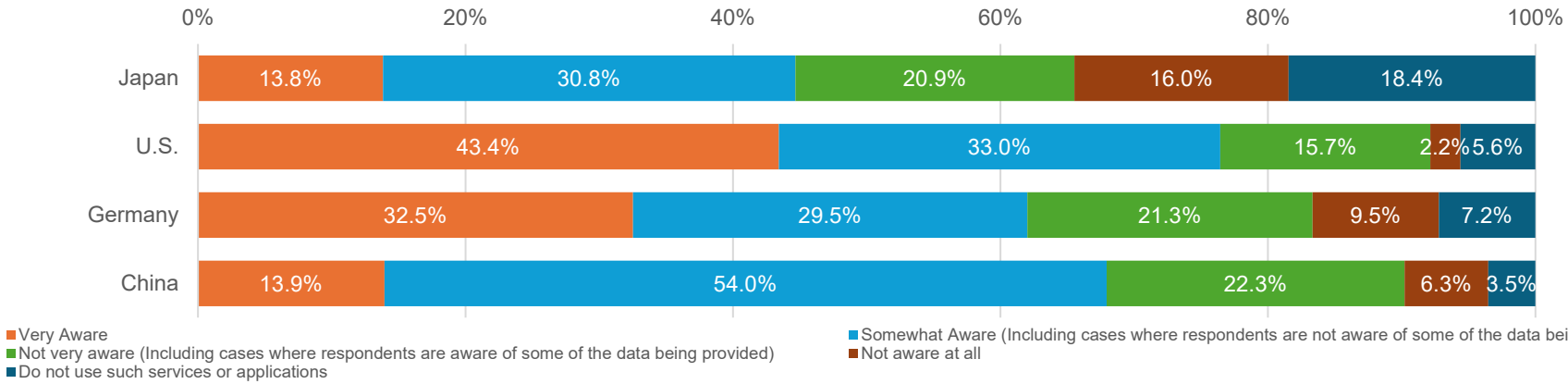
(Source) MIC “Communications Usage Trend Survey”

Anxiety felt when using the internet (multiple answers allowed)



(Source) MIC “Communications Usage Trend Survey”

Awareness concerning the provision of personal data



(Source) MIC (2026) “Survey Research on R&D on the Latest Information and Communications Technologies and Trends of Use of Digital Technologies in Japan and Abroad”