

Dear Excellencies, Distinguished Guests,

I thank you very much for giving me this opportunity, on behalf of the European Institute for Asian Studies, to present the current situation on seniors' access to digital market in Japan. Both Europe and Japan are experiencing similar demographic challenges with an increasing number of senior citizens, and I am honored to share current challenges and potential opportunities from a Japanese perspective today.

Japan is the world's oldest country – currently 25 percent of its population is aged 65 or over, which is around 33 million people out of 120 million in total. By 2040, it is estimated that more than a third of Japan's population will be senior citizens. Furthermore, Japan has marked the world's longest life expectancy. Men's average life expectancy is 80 years while women's average is 86 years, and these numbers are expected to continue increasing. With a falling fertility rate, the world's longest life expectancy, and with close to zero net immigration, Japan is facing a serious demographic challenge: not only a uniquely high ratio of seniors but also a sharp downturn in its total population.

In Japan, nowadays, 82.6% of its population has access to the Internet. The Internet use by Japanese seniors has been characterized by a sharp increase during the last decade. In 2004, only 26% of seniors had access to the Internet, but in 2014, more than a half of seniors are able to get information through computer applications. However, it is also true that nearly 40% of seniors does not have access to the ICT network. Furthermore, although around 60% of seniors know how to access to the Internet via PC, only 20% of seniors use smartphones. This means that 80% of seniors do not have access to the Internet outside their home while 94.1% of people in their 20s has access. According to the survey conducted by Ministry of Internal Affairs and Communications in 2015, most seniors are not very dependent on ICTs because they don't see the Internet as the most crucial and primary tool in finding the information. Instead of seeing the positive aspects of the Internet, some seniors are worried about the safety in cyberspace.

However, the difference between seniors and young people regarding the use of the Internet can widen digital inequality. For example, at the time of the Great Earthquake and Tsunami in 2011, the Internet, especially Social Network Services (SNS) such as Twitter, played a crucial role of lifeline. Most people acquired the information on tsunami through TVs and radio right after the earthquake, however, after electricity and communication lines were shut down, the internet was the main source of information. Indeed, in some of the devastated areas, one in three people who lost their lives was aged 65 years and over. This high ratio of senior victims was largely attributed

to the lack of access to the accurate information. Based on this tragic lesson, the government is proactively developing community-based support systems and emergency preparedness.

Moreover, following the increase of the number of nuclear families, the number of elderly couples living only by themselves is rising considerably. In 2012, the seniors either living alone or living with their spouses was 53.6%. The government's survey reveals that seniors with Internet access tend to stay healthier psychologically, as the internet can reduce their distance even if they don't live with their children. To ease isolation, not only the government but companies are actively engaged with helping older people by giving them the means to remain connected. For example, the company Kozocom developed its own SNS village, a social-networking site for older people who want to share and talk about their hobbies. Local NPOs (Non-Profit Organisations) and ministries as well as enterprises such as Microsoft are also successful in organising some local programmes, which aim to offer opportunities for all generations to learn IT skills as well as to stay connected in the region. These new opportunities will enrich the social lives of seniors to the great extent, even after their retirement.

The government's ICT policy has been mainly driven by social aspects. In the beginning of the 2000, companies were the main actors supporting computer learning for seniors. However, the lack of involvement of the government created digital inequality between seniors who were willing to learn and those who did not find values in learning IT skills. Therefore, since 2009, the government changed its ICT policy, and endeavoured to provide learning opportunities for a large number of people in collaboration with local entities, companies and NGOs. In the past, IT education for seniors tended to be very passive for learners, but the government reconsidering this learning system. In some programs, seniors are expected to attend not as learners but as leaders in order to raise their voice in public.

From the economic point of view, the government estimates that by 2020 ICTs can bring profits of 23 trillion yen (around 170 billion euro) per year. So far, only 14% of the markets for seniors is introduced ICTs. The government endeavours to create new business in the field of e-health, life-support, smart cities, robotics and welfare, to help seniors remain youthful and live easier. Moreover, Japan's Ministry of Health, Labour and Welfare finds that the biggest labour shortage lies in the welfare sector, which has 170,000 job offers (20 percent of the total labour shortfall). It says that 2.5 million caregivers will be needed by 2025, and technology including robotics is expected to help meet the demand. The government also emphasises the importance of collaborative research with Europe in the field of life science. Strengthening the collaboration with various actors, both domestic and global, Japan is actively working on establishing support

systems for seniors by providing opportunities of learning IT skills, investing health and medical sectors, and cooperating research projects globally, to prepare for hyper-aging societies.

I thank you very much for your attention.