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The International Subcommittee in the Copyright Subdivision of the Cultural Council

Report

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1. Introduction

After being asked by the Minister of Education, Culture, Sports, Science and Technology to investigate "suitable copyright system and policies for the digital transformation (DX) era" on the 19th of July, 2021, the Cultural Council discussed this matter during the two years of the 21st term (FY2021) and the 22nd term (FY2022).

Regarding the second point of discussion of the inquiry "Measures for protection of rights on content and payment of appropriate compensation adapted to the DX era", we considered effective remedies to future copyright infringements and overseas expansion of Japanese content in the context of changes in the diversity and types of copyright infringements due to the emergence of new technologies and innovations.

Based on this inquiry and the main issues for investigation resulting from the 21st term of the Copyright Subdivision of the Cultural Council (decided by the Copyright Subdivision on July 19, 2021), the following items have been discussed during the 21st term of the International Subcommittee and the items (1) and (2) have been compiled in the Interim Summaries: (1) Issues and responses regarding copyrights in the overseas expansion of Japanese content, (2) Responses to cross-border acts of piracy, and (3) International responses for copyright protection.¹

The International Subcommittee continued to investigate the subject and discussed (1) "International responses for copyright protection" and (2) "Responses to copyright infringements from cross-border piracy" during the 22nd term. In addition, regarding overseas expansion of Japanese content, considering "the importance to be handled both the distribution of legitimate editions of works and measures for countering pirated editions" mentioned in the Interim Summary, this point has been discussed along with the "Responses to copyright infringements from cross-border piracy". During the 21st and 22nd terms, committee members and related parties in a wide range of domains from

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Interim summaries of the Copyright Subdivision of the Cultural Council "Issues and responses regarding copyrights in the overseas expansion of Japanese content" (December 2021) and "Responses to cross-border acts of piracy" (March 2022).
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https://www.bunka.go.jp/seisaku/bunkashingikai/chosakuken/bunkakai/63/pdf/93683901 03.pdf
https://www.bunka.go.jp/english/policy/copyright/pdf/93705201 01.pdf [English version]

Japan made presentations and gave their opinions diligently.

Based on this report, we expect the Cultural Affairs Agency to collaborate with related ministries and agencies, as well as relevant organizations inside and outside Japan to strengthen their effort.

2. Responses to copyright infringements from cross-border piracy

- Regarding the responses to cross-border acts of piracy, opportunities for the Subcommittee members to present the results of their study have been arranged and opinions of experts from governmental authorities and relevant organizations have been listened to during the 21st and 22nd terms of the International Subcommittee. Deliberations have been held twice in FY2021 and twice in FY2022. The presentations have been given from mainly the following perspectives:
 - The situation of damages from pirated editions
 - Current measures being taken against pirated editions
 - Future efforts (issues, measures which would like to be taken but not being implemented, new developments, etc.)
- In addition, the Subcommittee had discussions about the online portal site providing information on measures against copyright infringements from pirated editions and the Consultation Desk established under the Cultural Affairs Agency. In particular, the Subcommittee considered the Consultation Desk's system and administrative contents, including the consultation targets, content of consultations, desired functions of the service, and special considerations for its establishment during the conception phase, as well as a further increase in the Consultation Desk services after the establishment of the system in August 2022.
- Curtailing copyright infringement inside and outside Japan and enabling creators and content industry employees to receive appropriate compensation for their work are important from the perspective of building a creation ecosystem and further promoting Japan's culture. In this regard, the interim summary "Issues and responses regarding copyrights in the overseas expansion of Japanese content", compiled during the 21st term of the Copyright Subdivision, points out the importance of both the distribution of legitimate editions of works and measures for countering pirated editions.

Moreover, as the interim summary states, with the growing oligopolization of measures by foreign capital to distribute content, it will be increasingly important to collaborate with platform businesses and ensure that copyright holders can assert their rights as copyright holders.

2-1. Damage caused by pirated works

- The digitalization of content that occurs in our advanced information society has been accelerated by the demand from people who stayed at home due to the COVID-19 pandemic and other factors. Taking publications as an example, the electronic market share, which accounted for 6.7% of the sales in 2014, has increased remarkably to reach 27.8% in 2021. In particular, the comics share in the electronic markets has increased year after year to reach 90% now².
- This situation, combined with the increase in the demand for digital content, resulted in the damage from pirated editions reaching the worst situation ever. Besides damage from infringement of works online or offline, the infringement of Japanese content has been spreading to all fields, including publications, music, software, and so on. In addition, the more the online environment develops through the development of high-speed networks and the diffusion of high-performance terminals, the more infringements by pirated editions tend to increase. Piracy sites are becoming more and more globalized with many of them using overseas servers, while some operators are living in foreign countries and, in some cases, mechanisms are used to allow access to the content from only foreign countries, such as Latin America. Although it has been confirmed that the damage tends to decrease on some media, piracy sites are becoming more sophisticated and complex and damage has become common. Reports in all fields from committee members and related experts to the International Subcommittee reveal the following situation.
- Regarding online infringements, between July 2019 and July 2022, the monthly number of visits to piracy sites in Japan reached a peak of 510 million in January 2022 due to the popularity of manga online reading sites. This marked a great increase over the little less than 400 million monthly visits to the major manga piracy site "Manga Mura" as of March 2018, when it was at its peak³. After that, the number of visits to online reading sites

² Annual report on the publication market 2022, Research Institute for Publications

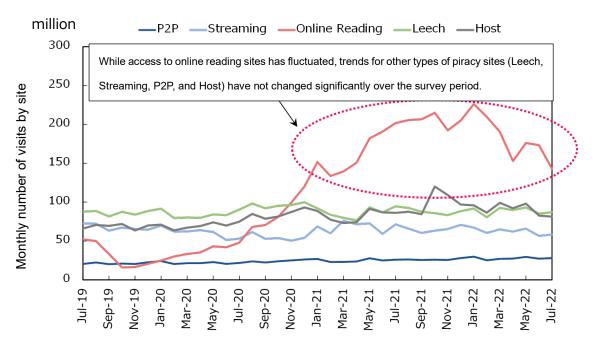
This analysis is based on data from SimilarWeb. The survey targeted copyright infringement sites handling movies, TV shows, animation, manga, etc. (excluding music). The visualization of the situation regarding piracy sites is important for solving infringement problems, but the "Survey Research on the Execution of the Revised Copyright Law" reported to the Subcommittee in February 2022 states that while analysis is conducted in conjunction with the "estimated values" provided by multiple access analytical tools for measuring the number of visits to piracy sites, "since detailed estimation methods are not open to the public, it is difficult to determine how accurately the current methods reflect the actual situation."

https://www.bunka.go.jp/tokei hakusho shuppan/tokeichosa/chosakuken/pdf/93682101 01.pdf

Thus it should be understood that at present there are limitations to accurately assessing the situation with the current technology.

declined sharply from October 2021 to February 2022 (see Fig.1) because the top three most visited piracy sites were shut down. However, after the closure, new piracy sites were born and disappeared with great momentum while the situation seesawed continuously.

Fig.1: Monthly number of visits to piracy sites⁴ (by site type, from July 2019 to July 2022)



Source: Document 2-1, International Subcommittee (the 2nd meeting), November 21, 2022⁵

If we compare the trends of the number of visits to legitimate video sites and piracy video sites, we see that the number of visits to legitimate sites tends to increase during the study period while the number of visits to piracy sites tends to decrease (see Fig.2). On the other hand, regarding manga sites, even if the number of visits to legitimate sites increased, the visits to piracy sites did not decrease (see Fig.3). In the case of manga sites, one of the reasons why visits to piracy sites did not decrease is the fact that it is difficult

⁴ Commissioned by Motion Picture Association, Inc. (MPA), conducted by Photonic System Solutions Inc., and supervised by The University of Electro-Communications Only the visitors who accessed the sites targeted in the survey from Japan were included.

⁵ • P2P (file sharing service): Individual users connected to a specific network share pirated content data. The number of users is considered limited since specific software and network knowledge are often required. Music, videos, publications, games, and other types of pirated content are used.

[•] Streaming (video distribution service): Users can watch and browse directly on the sites pirated content data uploaded on video sites (the users do not download the pirated content data). Even if the sites look like video-sharing sites, in reality, some of them are video-sharing sites with all or half of their content being pirated content uploaded by the operators themselves. Music, videos, publications, and other types of pirated content are used.

Online reading: The users can browse and read pirated content data uploaded on the site. Manga Mura and other manga piracy sites that were once popular were online reading sites. Currently, new piracy sites called "Manga Mura alternatives" are being launched one after the other and constitute obstacles to the success of the distribution of legitimate editions. Publications and other types of pirated content are used.

[•] Leech sites: The sites do not have pirated content data but lead to other sites with pirated content data. In most cases, they contain links to multiple sites. In Article 113, (2) (i) (a) and (b) of the Copyright Law revised in 2020, sites that can be subject to injunctions are defined as "a website, etc. that is found to be deliberately leading the public to an infringing work" and "a website [...] that is found to be used mainly for the exploitation of an infringing work by the public".

for legitimate sites to establish any difference in quality with piracy sites.

million — sum of 10 legitimate Video sites — sum of piracy Video sites

400

350

300

250

The number of visits to legitimate video sites is on the rise.

200

150

100

The number of visits to piracy video sites is on the decline.

Seb-17

April 17

War-75

Way-75

Wa

Fig.2: Trends in the number of visits to legitimate and piracy video sites⁶

Source: Document2-1, International Subcommittee (the 2nd meeting), November 21, 2022

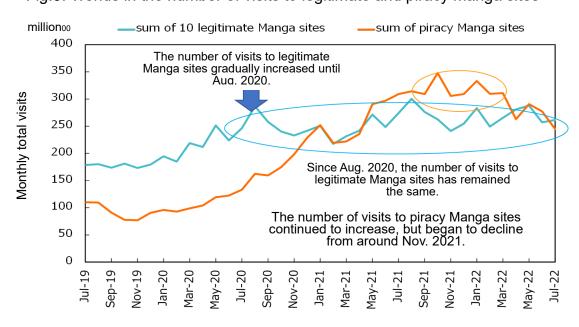


Fig.3: Trends in the number of visits to legitimate and piracy manga sites⁷

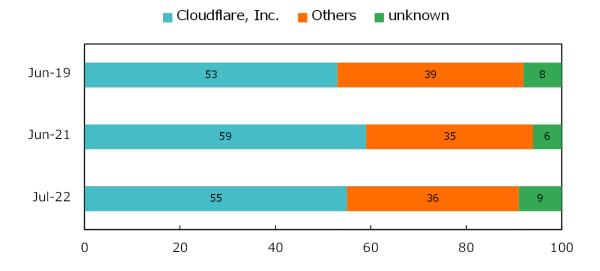
Source: Document2-1, International Subcommittee (the 2nd meeting), November 21, 2022

⁶ Commissioned by Motion Picture Association, Inc. (MPA), conducted by Photonic System Solutions Inc., and supervised by The University of Electro-Communications Only the visitors who accessed the sites targeted in the survey from Japan were included.

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A survey carried out in 2022 on the target piracy sites revealed that more than 50% of the IP address management companies (netblock owners) of the top 100 most accessed piracy sites used a CDN operator (see Fig.4) and pointed out that it is essential to take countermeasures.

Fig.4: Characteristics of piracy sites in the 2022 survey⁸ (Netblock Owners used by the top 100 piracy sites)



Source: Document2-1, International Subcommittee (the 2nd meeting), November 21, 2022

- Next, if we look at the damage in each content category, estimates from 2019 show that the total amount from piracy per year in relation to Japanese films, publications, music, and games popular online is probably between 330 billion and 430 billion, or even more⁹.
- Among these losses, the increase in the damage from pirated editions of manga has been marked, and in the one-year period from January 2021, the estimated damage to the manga industry exceeded one trillion yen¹⁰. This figure greatly exceeds the combined 612.6 billion yen in legitimate market sales for both paper and electronic manga books¹¹, showing the significant damage to the sales of legitimate editions. At the beginning of 2022, although

⁸ Commissioned by Motion Picture Association, Inc. (MPA), conducted by Photonic System Solutions Inc., and supervised by The University of Electro-Communications Only the visitors who accessed the sites targeted in the survey from Japan were included.

⁹ Estimates by Content Overseas Distribution Association (CODA)

¹⁰ Estimates by Authorized Books of Japan (ABJ)

Survey by Research Institute for Publications (FY2020)

the number of visits to manga piracy sites was reduced by half due to the shutdown of two giant sites, the same situation continued with twice as many visits as when the large manga piracy site Manga Mura was the most popular. Piracy sites that use sophisticated management methods to change their domain name in a short period appear frequently and make the number of visits increase suddenly over short periods of time, intensifying the sense of crisis of the situation (see Fig.5).

In addition, the existence of many piracy sites for manga translated into English has also been confirmed. Among them, the accesses to the top five sites exceeded 600 million monthly visits, mainly by visits from overseas users, as of December 2021, greatly surpassing the number of visits (approximately 390 million) to the top 10 Japanese piracy sites ¹² and indicating the increasing damage from pirated editions overseas.

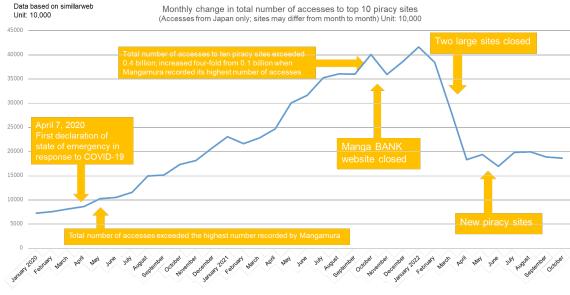


Fig.5: Monthly change in total number of accesses to top 10 piracy sites

Source: Document 2-3, International Subcommittee (the 2nd meeting), November 21, 2022

In regards to the field of music, with the transition from package sales to music streaming, the number of cases of illegal streaming through unlicensed music apps has been increasing. This has hindered the growth of legitimate streaming services.¹³

^{*}Three sites included in the above statistics also provide infringing contents other than published contents.

¹² Study by Authorized Books of Japan (ABJ)

¹³ Recording Industry Association of Japan

Similarly, regarding the infringement of software, game devices with multiple unauthorized recordings of so-called retro games and pirated DVDs of business software and other software are being sold. Concerning retro games, the estimated damage calculated from the deletion of games for the periods from May to September 2021 and from March to August 2022 only is equivalent to 2.8 billion yen.¹⁴ Regarding business software infringement, disks of elaborate copies of software made and issued overseas as well as downloadable software have been confirmed in large numbers and are being distributed illegally online.

2-2. Measures by the private sector and relevant organizations

Based on the situation described above, copyright holders, relevant organizations and governments are devising a wide range of means from their respective standpoints for taking countermeasures against pirated editions.

Measures by copyright holders and publishing right holders

Ocopyright holders and publishing right holders are taking continuous antipiracy measures, including requests for the removal of sites illegally providing contents, the initiation of proceedings for demanding information disclosure overseas, the bringing of criminal charges in collaboration with the police, and so on. The following are some examples of efforts made by publishers: the shutting down of two Vietnamese giant sites (collaboration with relevant ministries and agencies), measures to hide entire domains of piracy sites in search engines (collaboration with Yahoo and Google), exposure by the administration in China of the operators of the giant site Manga Bank (collaboration with CODA), request to stop the placement of advertisement to overseas advertising agencies that commit premeditated acts of infringement (collaboration with CODA), legal action taken against large CDN that provide services to piracy sites, civil action taken against the operators of Manga Mura (collaboration with ACCS).

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¹⁴ Estimate by the Association of Copyright for Computer Software

Table 1: Recent major legal actions against piracy sites

Case	Legal action
Haruka	· January 2019, Judgment of the criminal court against the
yumenoato	operators
	November 2019, Judgment of the civil court against the
	operators (plaintiff: publishers)
Manga Mura	June 2021, Judgment of the criminal court against the
	operators
	December 2021, Judgment of the civil court against the
	advertising agency (plaintiff: copyright holders)
	July 2022, Civil action taken against the operators (plaintiff:
	publishers)
Manga Bank	 June 2022, Administrative penalty against the operators in
	China
Fast movie	November 2021, Judgment of the criminal court against the
	operators
	November 2022, Judgment of the civil court against the
	operators (plaintiff: film studios)
Others	February 2022, Civil action taken against CDN operators
	(plaintiff: publishers)

Source: Compiled by the Cultural Affairs Agency

Measures by relevant organizations

In addition to these kinds of efforts by copyright holders and publishing right holders, various relevant organizations are promoting efforts for more efficiently and effectively countering piracy sites.

On top of the anti-piracy measures such as requests for the removal of platform businesses, the Contents Overseas Distribution Association (CODA) is focusing on specific actions against illegal site operators and online services through collaboration with cyber security experts, with the aim of strengthening international anti-piracy enforcement. In cases where the execution of copyrights is impossible in countries where piracy operators have established their bases, "knock and talk" direct negotiations with the operators are being carried out to stop acts of infringement. "Name and Shame" measures to identify and reveal malicious piracy sites are also being taken. CODA is also implementing measures to restrain ad placements in

collaboration with advertising associations and platform businesses and to prevent piracy sites from appearing in search results. As a result, operators of piracy sites in China have been successfully exposed by the administration and suffered administrative penalties, which represents a landmark case. In addition, an online advertising agency installed in Spain has been forced to stop the provision of services.

- Authorized Books of Japan (ABJ) is conducting anti-piracy campaigns using copyrighted characters and using the ABJ logo to certify legitimate services. In addition, ABJ is taking measures to reduce access to sites by users by compiling lists of piracy sites and utilizing youth filtering and security software.
- The Association of Copyright for Computer Software (ACCS) is promoting: 1) security measures such as requests for piracy site removals as well as fact-finding surveys, 2) support and cooperation with investigation activities by police, 3) awareness-raising and educational activities such as lectures for investigative agencies, etc.
- The Recording Industry Association of Japan (RIAJ) established the Copyright Protection Promotion Center to deter illegal searches and request removals of piracy sites for pirated videos, unlicensed music apps, illegal auctions, etc. In addition, depending on the case, it pursues the exercise of copyrights, including claims for damages and the bringing of charges against copyright violators.

2-3. Measures by the Cultural Affairs Agency

In order to effectively prevent damage caused by pirated works and ensure that copyright holders receive their due profits, the Japanese government formulated in October 2019 its "Comprehensive Measures and Work Schedule to Combat Online Piracy." Moreover, based on the progress of various measures for the passage and enforcement of revisions to the Copyright Law in 2020, including "measures against leech sites" and the "criminalization of downloads of infringed content," the government updated its "Comprehensive Measures and Work Schedule to Combat Online Piracy" in April 2021 and is taking a whole-of-government approach to carry out effective anti-piracy measures.

In order to enhance the effectiveness of copyright protection domestically and overseas, the Agency for Cultural Affairs (ACA) is supporting the preparation of copyright systems overseas, the strengthening of the enforcement of copyrights, the promotion of the distribution of awareness-raising materials, and so on, based on the government's "Comprehensive Measures and Work Schedule to Combat Online Piracy." The specific following measures are being implemented.

Bilateral consultations

Regular consultations are held between the offices in charge of copyright in China, Korea, and other countries where Japanese content is widely distributed and governmental bodies. Regarding the cases of Japanese content infringement, in addition to requests for the development and management of suitable legal systems and the strengthening of controls, consultations for the reinforcement of anti-piracy measures in collaboration with each country are being continued to strengthen bilateral cooperation. The Japan-South Korea Copyright Forum and Japan-South Korea Copyright Convention were held in FY2021 and FY2022.

Organization of training seminars

In countries and regions where copyright infringements of Japanese content are particularly significant, seminars, in which the latest situation of copyright infringement is presented and which relate to the determination of the authenticity of works, are organized for government employees and other people concerned in relevant countries and regions in order to improve the situation. From FY2022, the targets of such seminars have been extended to company-related parties in Japan and relevant countries and regions, and exchange of information from both the copyright infringement countermeasures perspective and the distribution of legitimate editions perspective is being carried out, as detailed in 3-2 below.

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ילי בוחבו	State	at training	caminar	ımn	lementation
Table 2.	State	oi tialillid	Scillillai	IIII	icilicilialion

Year	Target country or region	Co-organizer	
FY2021	Indonesia, Thailand,	Content Overseas	
	Taiwan, Beijing, Hong	Distribution Association	
	Kong	(CODA)	
FY2022	Taiwan, Beijing,	Content Overseas	
	(planned), Hong Kong	Distribution Association	
		(CODA)	
FY2022 ¹⁵	Singapore, Thailand,	Visual Industry	
	Philippines	Promotion Organization	
		(VIPO)	

^{*}Seminars were planned in FY2021 in Vietnam and Malaysia but they have been canceled due to the coronavirus pandemic.

Source: Compiled by the Cultural Affairs Agency

Responses to global copyright infringements

Measures such as surveys of the state of the legal systems and controls in countries where copyright infringements are arising, creation of handbooks to facilitate the enforcement of copyrights by Japanese copyright holders overseas, and seminars for copyright holders are being implemented. The Online copyright infringement (piracy) countermeasures handbook - China edition - has been created in FY2021. In FY2022, the information in the "General introduction edition" of the handbook has been updated and the content is planned to be further improved.

Awareness raising

Awareness-raising activities regarding copyrights are being implemented inside and outside Japan. Videos were created with high-notoriety characters and events with the participation of such characters were held in Japan and overseas but, due to the coronavirus pandemic, such awareness-raising activities are now carried out only online. Awareness materials related to piracy countermeasures are planned to be created in FY2022 to raise awareness of copyright in Japan.

Consultations Desk

Regarding the response to online copyright infringements from pirated editions, the Consultation Desk has been established on August 30, 2022, in

¹⁵ The training seminars co-organized by VIPO for Singapore, Thailand, and the Philippines are detailed in 3-2 in this report.

order to support even further the enforcement of copyrights by Japanese copyright holders. Before the Consultation Desk opening, a portal site providing information on measures against online copyright infringements from pirated editions was created on June 1, 2022, to summarize in the same place the know-how required by copyright holders to respond to copyright infringements. The information necessary for the enforcement of copyrights is provided on this site.

Online portal site providing information on measures against copyright infringements from pirated editions (June 1, 2022) ② 大 5 と 弁 回題回対策情報 ポータルサイト Help rights holders exercise their rights by providing know-how in an easy-to-understand manner - Contents -· Basics of copyrights and piracy · Guide book for the first request for removal Copyright infringement (piracy) countermeasures handbook FAQ Online portal site providing information on measures against copyright infringements from pirated editions Rights holders, etc. Lawyers Consultation Desk established *Individual meetings are held online, etc., depending on the case

Fig.6: Consultation Desk on copyright infringements from pirated editions

Source: Compiled by the Cultural Affairs Agency

2-4. Measures by the World Intellectual Property Organization (WIPO)

- As part of the anti-piracy measures taken by international frameworks, WIPO is promoting its "WIPO Alert," which is a platform WIPO uses for providing information.
- The Agency for Cultural Affairs has been providing the funds-in-trust to WIPO each year since FY1993. In addition, it promotes the development of the copyright laws and the adhesion to the treaties in developing countries in the Asia-Pacific region, and supports the reinforcement of copyright infringement controls and training in copyright societies in cooperation with WIPO. Every

16 The WIPO Alert aims at countering piracy with an international framework for solving the problem of advertisements placed on piracy sites. Lists of infringement sites (alert list) are provided to WIPO, which WIPO then disseminates to advertisers and advertising agencies in multiple countries.

year, training sessions in relation to copyright protection are implemented in Japan for employees of offices in charge of copyrights and enforcement agencies in developing countries (Tokyo Special Training Program), as well as training sessions related to centralized copyright management systems for government officials and employees of centralized management organizations in developing countries (Practical Training for Centralized Management Organization). In recent years, seminar programs that can be held online are being implemented due to the coronavirus pandemic.

3. Issues and responses regarding copyrights in the overseas expansion of Japanese content

- With the globalization of the markets due to the development of digital technologies and the content industry in which the means of distribution are changing, it is important to develop markets overseas and that the parties involved in content creation and distribution can secure appropriate compensation through contractual negotiations with foreign companies.
- Short and mid-term action is also expected with regard to the Intellectual Property Strategic Program 2021 (Intellectual Property Strategy Headquarters, July 13, 2021) in which the following is mentioned as a direction of measures: "The diversification of distribution channels due to digitalization has put in place an environment enabling content to be disseminated overseas, bringing opportunities to access overseas content markets. As such, investigate issues relating to copyright in the overseas expansion of Japanese content tailored to the digital age, and support efforts to increase earnings from the overseas use of copyright works by such means as enhancing the functions of centralized copyright management organizations in the Asia-Pacific region via the World Intellectual Property Organization's (WIPO) financial contribution program. In addition, consider further support measures, such as collaboration with relevant organizations with a view to the overseas expansion of copyright works." The same matter has also been included in the Intellectual Property Strategic Program 2022 (Intellectual Property Strategy Headquarters, June 3, 2022).
- In this context, it is necessary to provide know-how and support to mainly small and medium-size content providers when they expand content overseas. Therefore, discussions have been carried out during the 21st term of the International Subcommittee with priority placed on the "Issues and responses regarding copyrights in the overseas expansion of Japanese content". This matter has been discussed three times in FY2021 and, each time, we created opportunities for committee members involved in the overseas expansion of content to make presentations from various viewpoints to widen the range of the discussions and we also listened to the opinions of experts when needed. The main perspectives regarding which we have listened to opinions are as follows.

- The situation of overseas expansion of the Japanese content market
- Examples of successes and failures of content expansion overseas
- How to find partner companies overseas, foreign country institutions, etc.
- Overseas expansion strategies (the kinds of content being expanded overseas, distribution media and paths)
- Issues regarding overseas expansion (legal issues, distribution and contractual aspects, localization issues, benefits as a business, issues regarding technical aspects such as translation)
- For each project, the sectors where it seems that "overseas expansion", "market development", and "human resources training" are the most advanced, and sectors with some issues
- Measures that need to be considered in the future to promote overseas expansion (from the copyright perspective)
- In addition, as mentioned above, regarding overseas expansion of Japanese content, considering "the importance to be handled both the distribution of legitimate editions of works and measures for countering pirated editions" mentioned in the interim summary, these points have been discussed along with the responses to copyright infringements from cross-border piracy during the 22nd term of the International Subcommittee.

3-1. Issues and measures by the private sector and relevant organizations

The International Subcommittee has pointed out the following main issues and the following possible measures to solve them.

- (1) Special considerations when developing a strategy for overseas expansion
 - Keywords for future overseas expansion are "global" and "digital". It is
 important to put a high value on the creation and diffusion of cross-border
 content, to form a team made of members with specialized skills (marketing
 capacities, knowledge and experience in copyright, networks, linguistic
 abilities, etc.), and to develop the business based on marketing methods that
 use digital means.
 - Since the value of the works to be expanded overseas changes depending on the balance and structure of the supply and demand of the licensors and licensees, it is important to develop a strategy while keeping in mind that the

works need to reach the general consumers (fans). Increasing the number of fans in the world makes it possible to further commercialize games and goods derived from manga and anime and to expand the appeal and value of the works to multiple dimensions.

- The function of the industry is to deliver content to consumers. In this regard, it is necessary to be conscious of the diffusion strategy that will be used. While collaboration with platforms will most likely become more important in the future, with the growing oligopolization of diffusion means developed with foreign capital, it will be crucial to stay aware of the fairness of the transaction terms and the necessity to ensure that copyright holders can assert their rights as copyright holders.
- New content combining multiple elements of different types of content (music, manga, game, novel, etc.) has appeared. In particular, individual creators went far beyond the concept of "amateur creators" and are achieving brilliant results through diversification of monetization means and monetization based on fan fictions.
- Anti-piracy measures and the distribution of legitimate editions are the two wheels of a cart. Works should be expanded overseas quickly after the release of legitimate editions and opportunities for the fans to enjoy the works should be created not only in Japan but also overseas. These constitute essential anti-piracy measures. In this matter, the collaboration of the entire country is necessary outside the scope of the interest of individual companies.
- In the field of music, correctly understanding the existing international management mechanisms for music copyrights and taking into consideration what is important depending on the type of utilization, such as live concerts, broadcast programs, and music streaming, will lead to smooth and troublefree overseas expansion.
- With the acceleration of globalization and digitalization, the role achieved by centralized management organizations is becoming more important and we should keep in mind that new responses adapted to the changing times are expected from international centralized management mechanisms.

(2) Copyright issues when expanding content overseas and possible measures to solve them

(1) General statement

Issues

- While knowledge and experience related to copyright are necessary, rights regarding domestic works should be handled before overseas expansion.
- Works localization matching the local culture and era is necessary.

Measures

- It is important to involve legal human resources from the first stage of the projects.
- It is effective to establish consultation desks to facilitate support for overseas expansion of content providers, in particular medium and small-size providers.

② Legal human resources¹⁷

Issues

• There is not enough specialized personnel (personnel able to negotiate with local parties related to the project, lawyers specialized in the entertainment sector, etc.) who can assist with overseas expansion.

Measures

- Possible measures are finding and training specialized personnel who can assist with overseas expansion, building a network that centralizes information, and providing practical training opportunities especially for inexperienced specialized personnel.
- It is effective to establish consultation desks to facilitate support for overseas expansion of content providers, in particular medium and small-size providers (same as above).

③ Marketing

Issues

It is necessary to analyze the local market and carry out marketing activities
when publishing content overseas. In this matter, since a local network is
needed, it is important to make efforts to create links between useful local
human resources, companies, and law firms and Japanese companies, and

¹⁷ See Material 1-1 Legal issues regarding overseas publication of content - From the perspective of contracts and laws - (by Karatsu Mami, committee member), International Subcommittee (The 2nd meeting), September 22, 2021
https://www.bunka.go.jp/sejsaku/bunkashiggikai/chosakuken/kokusai/r03 02/ndf/93396401 01 pdf

- to establish places, such as business matching seminars, that facilitate concrete transactions.
- Works localization matching the local culture and era is necessary (same as above).

Measures

- Another possibility for medium and small-size content providers is to use the services of JETRO, which has established bases overseas and possesses information about local legal systems, etc.
- It is advised to go beyond the idea of only selling the content but it is also necessary to understand the current state of marketing and to build a system that spans from local monetization to the generation of a propagation effect before expanding overseas.

4 Individual creators

Issues

 Since individual creators lack knowledge related to copyright when publishing content overseas, there are examples of creators who could not collect appropriate royalties or who could not take measures in the case of content infringements.

Measures

- To promote overseas expansion, from the perspective of simplifying the handling of rights, it is useful to use the services of centralized management organizations, especially for individual creators. It is necessary to raise awareness to promote a correct understanding of the centralized management mechanisms for creators, right holders, and users.
- Since it is important to provide opportunities for individual creators to acquire appropriate knowledge, it is first necessary to diffuse accurate information in relation to copyrights, anti-piracy measures, etc.

(5) Translation

Issues

• When expanding Japanese content overseas, the fact that foreign intermediary companies do not understand Japanese is often an obstacle.

Measures

 Negotiation support that includes interpretation and translation of specialized documents is important. Providing support for preliminary translation (rough translation to be used as a draft for translation) of publications facilitates the first steps toward publishing content overseas.

Table 3. Issues and responses regarding copyrights in the overseas expansion of Japanese content, Interim Summary of the Copyright Subdivision (December 2021)

1 | Special considerations when developing a strategy for overseas expansion

- ➤ Keywords for overseas expansion are global and digital. It is important to build a team of personnel with specialized skills to develop the business.
- > It is important to develop a strategy while keeping in mind that the works need to reach the general consumers (fans).

 Further commercialization of games and goods derived from manga and anime to expand the appeal of the works to multiple dimensions.
- The collaboration with platform businesses is more and more important. Stay aware of the fairness of the transaction terms and the necessity to ensure that copyright holders can assert their rights as copyright holders.
- Individual creators went far beyond existing concepts and are achieving brilliant results through diversification of monetization means and monetization based on fan fiction.
- >Anti-piracy measures and the distribution of legitimate editions are the two wheels of a cart.
- In the field of music, correctly understanding the existing international management mechanisms for music copyrights will lead to smooth overseas expansion.

2 | Copyright issues and conceivable measures

	Issues	Conceivable measures
General statement	 Knowledge and experience related to copyrights are necessary. Rights should be handled before overseas expansion. Localization matching the local culture and era is necessary. 	 Build mechanisms that involve legal human resources from the first stage of the projects. Establish consultation desks to facilitate support for overseas expansion (same as above).
Legal human resources	There are not enough personnel who can assist with overseas expansion (personnel able to negotiate with local parties related to the project, lawyers specialized in the entertainment sector, etc.).	 Find and train specialized personnel and build a network to centralize information Provide practical training opportunities for inexperienced specialized personnel. Establish consultation desks to facilitate support for overseas expansion (same as above).
Marketing	 Local marketing activities are necessary. A local network is required for this purpose. It is important to make efforts to create links between useful local human resources, companies, and law firms and Japanese companies, and to establish places, such as business matching seminars, that facilitate concrete transactions. Localization matching the local culture and era is necessary (same as above). 	 Medium and small-size content providers should consider using the services of JETRO. It is advised to go beyond the idea of only selling the content but it is also necessary to understand the current state of marketing and to build a system that spans from local monetization to the generation of a propagation effect before expanding overseas.
UGC	 Since there is a lack of knowledge related to copyright when publishing content overseas, there are examples of creators who could not collect appropriate royalties or who did not take measures against content infringements. 	 Raise awareness to promote a correct understanding of the centralized management organizations. Diffuse accurate information in relation to copyrights and anti-piracy measures.
Translation	 The Japanese language is often an obstacle when publishing content in Japanese overseas. 	Translation support for specialized documents.

Source: Compiled by the Cultural Affairs Agency

3-2. Measures by the Cultural Affairs Agency and related organizations

- Expanding copyrighted works inside and outside of Japan and receiving appropriate compensation are important to promote Japan's culture but also as an anti-piracy measure. In FY2021, we focused on China, which is the larger market in the world, and created the handbook *Survey report regarding overseas expanding of Japanese content China edition -*¹⁸ that compiles information about contracts and other practical matters required when publishing content overseas. This handbook has been made available on the online portal site providing information on measures against copyright infringements from pirated editions in an effort to diffuse the information.
- In this report, the legal and practical know-how required when expanding business related to Japanese content in China is detailed for each field of content. The specific structure of the report is as follows. The section "I. General statement" presents the overall situation of the content market in China, an overview of business practices in Japan and China, the restrictions and censorship in the Chinese content market, and the evolution of the Chinese copyright law revisions. The section "II. Detailed articles" describes in more detail the market overall situation, the distribution channels and major businesses, the restrictions and censorship, other topics regarding the sector, and matters that should be studied by Japanese companies in relation to anime, films, video streaming, publications, games, music and other content fields. The section III. describes in detail the special considerations to keep in mind when concluding a contract in China and some representative examples. The section IV. presents interviews of experts from 11 Japanese content providers that have expanded their business in China. Finally, the section V. summarizes the considerations to keep in mind when expanding business in China, also from the perspective of copyright and other intellectual property rights management. A brief summary is given below.

Business practices

 It is necessary to keep in mind the differences in business practices between China and Japan, and to discuss and clarify each important point at issue.

Choosing a partner

¹⁸ Cultural Affairs Agency's "Online portal site providing information on measures against copyright infringements from pirated editions" https://www.bunka.go.io/seisaku/chosakuken/kaizoku/handbook.html

• It is important to make a selection from the viewpoints of the "financial foundation of the company", "track record in the particular business", "creditworthiness", and "seriousness about the project".

Handling of censorship

• It is necessary to understand the situation and changes in the main restrictions (restrictions regarding the expression of content and the content providers) before developing a business strategy.

Handling of contracts

 In order to avoid troubles when making transactions with Chinese companies, it is important to negotiate carefully and establish a contract that clarifies the important points.

Handling of piracy

- With the spread of unlicensed video and music streaming and misappropriated applications of trademark rights and copyrights, it is necessary to adapt quickly when damage occurs or when the situation regarding the damage changes.
- To allow continuous growth of the content industry, it is important that each actor involved in content creation and distribution secures appropriate compensation through the establishment of contracts when expanding to foreign markets. For this purpose, the Collections of cases of overseas content expansion - Important points regarding the license agreements document has been created in FY2021 to assist medium and small-size content providers who want to publish content overseas. This document includes basic information on copyrights and license agreements, cases of overseas expansion in each content field, and information on support programs available when expanding content overseas. Cases of overseas expansion in the following 7 most representative fields of the content industry are presented: characters, anime, manga, games, series and live action, music, and individual creators. In each field, we remark that various means are used, such as the acquisition of comprehensive authorizations from right holders for the expansion on multiple media, the use of different types of licenses (exclusive, non-exclusive), the setting of licensing periods, etc.

This collection of cases¹⁹ has been made available on the online portal site providing information on measures against copyright infringements from

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¹⁹ Cultural Affairs Agency's "Online portal site providing information on measures against copyright infringements from pirated editions"https://www.bunka.go.jp/seisaku/chosakuken/kaizoku/handbook.html

pirated editions in an effort to diffuse the information.

 Based on the understanding that the issue should be handled from both antipiracy and legitimate edition distribution perspectives, we organized training seminars in FY2022 for people working with intellectual property in governments and companies in three countries of Southeast Asia (Singapore, Thailand, and the Philippines) with the purpose of strengthening the promotion of legitimate edition distribution while increasing the effectiveness of anti-piracy control. During these seminars, we confirmed that copyright infringements have been increasing while each country was affected by the new coronavirus pandemic and we shared information on the legal system regarding copyright and the latest anti-piracy measures in each country. For example, in Thailand, the diffusion of information on anti-piracy measures is targeted not only to the right holders but also to the content users, while, in the Philippines, campaigns against the sudden increase in pirated editions are being reinforced. Moreover, Singapore revealed that the country is not only taking legal measures against piracy, but also focusing on educational measures.

In addition, we noticed that considering the legal system regarding copyright registration of the foreign country when publishing content in this country may help in localizing the content efficiently and effectively. The importance of narrowing down the targets, promoting the distribution of legitimate editions by means that include activities that raise awareness of the content users, and continuing simultaneous anti-piracy efforts has been pointed out.

3-3. Measures by the World Intellectual Property Organization (WIPO)

As part of the programs implemented with the funds-in-trust to WIPO, the "Coaching program" that contributes to the creative industries is being carried out in the developing countries of the Asia-Pacific region since FY2021. The purpose of this program is to make it possible for the creators and content creation companies in each country to receive appropriate compensation (revenue) by using copyrights. Diffusing successful stories of the utilization of copyrights, as well as providing practical knowledge and technologies, are the means used to develop businesses and make them grow. Five sessions of this program have been held up to now around themes such as publications, music, and arts.

4. Issues and future measures regarding anti-piracy and overseas expansion of content

- Although copyright holders' exercising of their copyrights is the fundamental response to the infringement of copyrighted materials, the current situation of damage being incurred does not permit a situation of non-action. The Cultural Affairs Agency should further strengthen the efforts to combat piracy in collaboration with relevant organizations. The following main issues and conceivable future measures have been identified in the advancement of piracy countermeasures by relevant organizations, etc.
- Japanese content is popular overseas but it has been pointed out that compared to, for example, copyright holders in the United States, Japanese copyright holders tend not to exercise their rights, leading as a result to increasing damage from pirated works. At the same time, copyright holders are dealing with the problem of the high costs of measures against piracy. In many cases, the attempts to exercise copyrights end up as a waste of money, with only some cases resulting in copyright holders being able to recover costs through civil lawsuits and the burden of proving the damage amount being often too heavy. It has been pointed out that such concerns have worked to stop the exercise of copyrights. Since individual creators often have inadequate knowledge about copyrights, even if their content is infringed, they tend not to take appropriate action. The content industry in Japan is composed for the most part of small and medium-sized businesses and individual creators. Therefore, it is necessary to take measures taking this particular situation of our country into consideration.
- Considering this situation, the Cultural Affairs Agency has opened the online portal site providing information on measures against copyright infringements from pirated editions and the Consultation Desk in FY2022. Although it is just the beginning of such efforts, the strengthening of measures that help right holders exercise their rights more efficiently should be planned. Such measures may include the collection of information on the situation of infringement through existing mechanisms, the diffusion of appropriate information based on the latest situation, and the revision of the methods for calculating damage compensations discussed during the 22nd term of the Legal Issue Subcommittee in order to promote the exercise of rights by the right holders.

 Since the advancement of communication technologies has made the piracy problem borderless, piracy countermeasures implemented in cooperation with other countries overseas are increasingly important. Regarding infringement acts from overseas, pirated works produced and distributed overseas are flooding into domestic markets, and even when people in Japan who participate in these infringement acts are identified and exposed, in most cases such acts continue and the problem is not solved definitively. In regard to online copyright infringements, blocking access from Japan using geo-blocking technology (access restriction from a particular area) poses the problem of not being able to detect infringements by right holders in Japan. Even when the right holders try to exercise their rights directly against the people who committed the infringement acts, there are major obstacles to such individual responses since it requires a fair amount of time and money to investigate the operators' information and exercise the rights locally. In addition, it appears that lots of operators of piracy sites are overseas individuals or organizations with bases in foreign countries. Therefore, it becomes more and more important to work with investigative agencies in the countries, service providers of the piracy sites, and other parties involved.

The Cultural Affairs Agency has made international collaboration efforts for many years, mainly with Asian countries, and has achieved some results in relation to anti-piracy measures. In the future, the Cultural Affairs Agency will need to develop new relationships in order to increase its collaboration with foreign governments while capitalizing on previous results. In relation to the programs to strengthen international collaboration, countries and regions requiring focused efforts should be determined in advance while taking into consideration the changing situation of the piracy issues, and international frameworks, such as WIPO, should be used to implement such programs more effectively.

In addition to reinforcing anti-piracy measures, it is also necessary to promote the other wheel of the cart, which is the distribution of legitimate editions. It will also be necessary to continue the efforts to promote the enhancement of legitimate editions in order to transform the users' awareness of pirated works inside and outside Japan and to attract overseas manga fans to legitimate editions. Concretely, it is expected from the Cultural

Affairs Agency that it makes awareness-raising efforts, for example by organizing seminars with the purpose of promoting both anti-piracy measures and the distribution of legitimate editions, and that it collaborates with relevant ministries and agencies to provide appropriate support.

- One of the effective methods to reduce the damage from pirated editions and promote the distribution of legitimate editions is to cultivate in society the spirit of "say no to piracy" and the awareness that piracy is not allowed. While the crime of copyright infringement is becoming more prevalent due to the impact of the advancement of digitalization and networking and the diffusion of advanced-technology terminals, awareness-raising campaigns inside and outside of Japan carried out in collaboration with the public and private sectors are necessary. These campaigns should target in particular the young generation and deepen the knowledge and understanding of copyright protection in an easy-to-understand manner. Regarding overseas awareness-raising campaigns in countries and regions requiring focused efforts, it is necessary to consider measures taken in collaboration with the government of the country and to implement them in a continuous manner. In addition, since specialized teaching materials on the piracy problem are effective to teach the mechanisms and damage of piracy to the Japanese young generation as part of their school education, it will be necessary to enhance such teaching materials being created in FY2022. It will also be necessary to collaborate with other awareness-raising efforts made in Japan when developing such teaching materials.
- Continuous efforts are absolutely necessary to counter damage from piracy that evolves continually. We will have to accurately consider the required efforts based on the state of the existing measures and the evolution of the damage from piracy.

5. Other responses to international issues regarding copyright protection

The working team for the examination of the broadcasting treaty (hereinafter "Working team on broadcasting") has been established to examine the response to the broadcasting treaty currently discussed by the Standing Committee on Copyright and Related Rights (SCCR) of the WIPO. The results of the examination carried out by the Working team on broadcasting on December 26, 2022, are as follows.

- Explanations were given in relation to the evolution of the discussions on the broadcasting treaty and the future plans received from the secretariat, the Acting Chair's draft text disclosed during the 42nd session of the SCCR held in May 2022, and the commentaries from Japan related to this draft text provided to the SCCR secretariat. This was followed by a question and answer session on these explanations.
- Then, in light of the fluctuating state of this draft text that leaves extensive space for future revisions, we discussed and considered what should be the policy of Japan regarding the basic notions of "object of protection" and "rights to be granted".
- The Working team on broadcasting will analyze the state and trends of the broadcasting industry in Japan and overseas and will continue to discuss what should be the response of Japan, mainly regarding the "object of protection" and "rights to be granted" mentioned in the broadcasting treaty, based on the advancement of the discussion in WIPO.

In addition, Mitsubishi UFJ Research and Consulting, which was in charge of the "Survey in foreign countries regarding the state of the copyright law revisions, evolution of the related measures, and the extended collective licensing system" carried out in FY2022, made a presentation regarding this survey.

We will continue to collect information on the trends in foreign countries in the future to use it as a reference for discussions about the policies in Japan.

Members of the 21st term of the Copyright Subdivision of the Cultural Council (As of July 19, 2021)

Inoue Yuriko Professor at the Faculty of Law, Graduate School of Law, Hitotsubashi University

Imura Hisato Vice-president of the Japan Book Publishers Association

Obuchi Tetsuya Professor at the Faculty of Law, Graduate Schools for Law and Politics, The

University of Tokyo

Kacho Naotaka Secretary general of the Motion Picture Producers Association of Japan

Kawashima Nobuko Professor at the Faculty of Economics, Doshisha University; Guest professor at The University of

Tokyo Institute for Future Initiatives

Kouno Yasuko President of the Japan Consumer's Association

Sueyoshi Wataru Lawyer

Suzuki Masafumi
 Professor at the Graduate School of Law, Nagoya University

Sorita Reiko Member of the Japan Library Association, Chief of investigation support at the

Chofu City Library

Tamura Yoshiyuki Professor at the Faculty of Law, Graduate Schools for Law and Politics, The

University of Tokyo

O Chaen Shigeki Professor at Osaka University Law School

Nakazawa Kei Managing director at The Japan Writers' Association

Nihei Atuhiro Executive director at Japan Net Creators Association

Hata Yoichiro Managing director and Secretary general at the Recording Industry Association

of Japan

Hiroishi Mihoko Manager of the copyright and contract department of NHK Intellectual Property

Center

Maeda Tetsuo Lawyer

Maeda Yuko Deputy manager of the programs and copyright department of The Japan

Commercial Broadcasters Association

Maruyama Hidemi Director at the Japan Council of Performers Rights & Performing Arts Organizations; Member of

the Executive Committee of the Center for Performers' Rights Administration

Miya Itsuki Director at the Japan Artists Association; Professor at Japanese Painting Course in the Department

of Painting at the Faculty of Art and Design of Tama Art University; Nihonga painter (member of the

Association of Japanese Painting)

Miyajima Kasumi News commentator at Nippon Television Network Corporation

Motoki Katsuhide Executive director at the Directors Guild of Japan; Film director

Morita Hiroki Professor at the Faculty of Law, Graduate Schools for Law and Politics, The

University of Tokyo

Yamasaki Toshi Director at the Japan Video Software Association; Representative director and

CEO of Toho-Towa Company

Yamashita Toshinaga Chairperson of the Newspaper Copyright Subcommittee of the Japan

Newspaper Publishers & Editors Association

Yoshimura Takashi Head of the Industrial Technology Bureau of the Japan Business Federation

Wada Yasutaka Special advisor at the Network Music Rights Conference; Advisor in charge of copyrights at the

All-Japan Karaoke Industrialist Association

Watanabe Toshiyuki Composer; Director at the Japanese Society for Rights of Authors, Composers and Publishers;

Executive director at the Japan Composers & Arrangers Association

* © Chairperson of the Subdivision, o Acting chairperson of the Subdivision

(27 members in total)

Members of the 21st term of the International Subcommittee in the Copyright Subdivision of the Cultural Council

(As of August 18, 2021)

Associate professor at the Faculty of Law, Graduate School of Law, Ikegaki Naoto

Hitotsubashi University

Manager of the public relations department and legal department of

Ito Atsushi Association ABJ, Acting manager of the Edition and General Affairs

department of Shueisha

Inaba Tomoko Lawyer

Imamura Tetsuya Professor at the School of Information and Communication, Meiji University

Okumura Koji Professor at the Law School, Keio University

Karatsu Mami Lawyer

Goto Takero Representative director of the Content Overseas Distribution Association

Goto Hideki Senior vice-president of Sony Music Entertainment

Suko Manami Executive director at the Japanese Society for Rights of Authors

Suzuki Masabumi Professor at the Graduate School of Law, Nagoya University

Chaen Shigeki
 Professor at Osaka University Law School

Tsukasaki Takayuki Lawyer

Tsukamoto Susumu Senior Executive Officer and CPSO at MEDIA DO

Morishita Mika General manager at Visual Industry Promotion Organization (VIPO)

Associate professor at the School of Informatics and Engineering, Watanabe Eriko

University of Electro-Communications

* O Subcommittee chief, o Acting subcommittee chief

(15 members in total)

Members of the 22nd term of the Copyright Subdivision of the Cultural Council (As of July 6, 2022)

Ikkanda Takeshi Managing director at Japan Photographic Copyright Association

Inoue Yuriko Professor at the Faculty of Law, Graduate School of Law, Hitotsubashi University

Ueno Tatsuhiro Professor at the Faculty of Law, Waseda University

kawashima Nobuko Professor at the Faculty of Economics, Doshisha University

Director of the Japan Book Publishers Association; Representative director and

Kiire Fuyuko CEO of Chikumashobo

Kouno Yasuko President of the Japan Consumer's Association

Shiihara Ayako Member of the Copyright committee of the Japan Library Association

Sueyoshi Wataru Lawyer

Professor at the Faculty of Law, Graduate Schools for Law and Politics, The

University of Tokyo

Chaen Shigeki Professor at Osaka University Law School

Director at the Motion Picture Producers Association of Japan; President and

Tezuka Osamu CEO of Toei Company

Nakagawa Tatsuya Lawyer

Nakazawa Kei Managing director at The Japan Writers' Association

Nihei Atsuhiro Executive director at Japan Net Creators Association

Hata Yoichiro Executive director at Recording Industry Association of Japan

Manager of the copyright and contract department of NHK Intellectual Property

Hiroishi Mihoko Center

Fukui Akira

Maruyama Hidemi

Chairperson of the Newspaper Copyright Subcommittee of the Japan

Newspaper Publishers & Editors Association

Deputy manager of the programs and copyright department of The Japan

Maeda Yuko Commercial Broadcasters Association

Director at the Japan Council of Performers Rights & Performing Arts Organizations; Member

of the Executive Committee of the Center for Performers' Rights Administration

Director at the Japan Artists Association; Professor at Japanese Painting Course in the

Miya Itsuki Department of Painting at the Faculty of Art and Design of Tama Art University; Nihonga

painter (member of the Association of Japanese Painting)

Miyajima Kasumi News commentator at Nippon Television Network Corporation

Director at the Japan Video Software Association; Representative director and

Yamasaki Toshi CEO of Toho-Towa Company

Yokoyama Mika Professor at the Graduate School of Law of Kyoto University

Secretary General of the 21st Century Public Policy Institute of the Japan

Yoshimura Takashi Business Federation

Wada Shigefumi Director of the Association of Copyright for Computer Software

Wada Yasutaka	Special advisor at the Network Music Rights Conference; Advisor in charge of copyrights at
	the All-Japan Karaoke Industrialist Association
Watanabe Toshiyuki	Director at the Japanese Society for Rights of Authors, Guest professor at
	Senzoku Gakuen College of Music

 $^{^*}$ \odot Chairperson of the Subdivision, \circ Acting chairperson of the Subdivision

(27 members in total)

Members of the 22nd term of the International Subcommittee in the Copyright Subdivision of the Cultural Council

(As of August 23, 2022)

Ikegai Naoto	Associate professor at the Faculty of Law, Graduate School of Law,
	Hitotsubashi University
	Manager of the public relations department and legal department of
Ito Atsushi	Association ABJ, Acting manager of the Edition and General Affairs
	department of Shueisha
Inaba Tomoko	Lawyer
Imamura Tetsuya	Professor at the School of Information and Communication, Meiji University
Ueno Tatsuhiro	Professor at the Faculty of Law, Waseda University
Karatsu Mami	Lawyer
Goto Hideki	Senior vice-president of Sony Music Entertainment
Suko Manami	Managing director at the Japanese Society for Rights of Authors
Chaen Shigeki	Professor at Osaka University Law School
Tsukasaki Takayuki	Director of the Intellectual Property Protection Center of the Content Overseas Distribution Association; Lawyer
Fuchi Maiko	Associate professor at the Faculty of Law, Kanagawa University
Morisita Mika	General manager at Visual Industry Promotion Organization (VIPO)
Wada Shigefumi	Director of the Association of Copyright for Computer Software
Watanaha Erika	Associate professor at the School of Informatics and Engineering,

University of Electro-Communications

Watanabe Eriko

(14 members in total)

^{*}Subcommittee chief,

Acting subcommittee chief

21st term of the International Subcommittee in the Copyright Subdivision of the Cultural Council - Course of deliberation and list of presenters

The 1st meeting August 18, 2021 (Wed.)

- (1) Appointment of the subcommittee chief [not disclosed]
- (2) Policy of the discussions for the 21st term of the International Subcommittee
- (3) Issues and responses regarding copyrights in the overseas expansion of Japanese content

Presenters

- · Goto Hideki, subcommittee member
- Tsukamoto Susumu, subcommittee member
- Morishita Mika, subcommittee member
- (4) Others

The 2nd meeting September 22, 2021 (Wed.)

(1) Issues and responses regarding copyrights in the overseas expansion of Japanese content

Presenters

- Karatsu Mami, subcommittee member
- Nobutani Kazushige (Executive Vice President at the Japan External Trade Organization)
- Wakebe Yusuke (CEO of IP FORWARD)
- (2) Others

The 3rd meeting November 17, 2021 (Wed.)

 Issues and responses regarding copyrights in the overseas expansion of Japanese content

Presenters

- Suko Manami, subcommittee member
- Nihei Atsuhiro (Executive director at Japan Net Creators Association)
- Senga Atsushi (Manager at PwC Consulting LLC)
- (2) Others

The 4th meeting January 25, 2022 (Tues.)

(1) Responses to cross-border acts of piracy

Presenters

- Shiobara Seiji (Councilor in the "Cool Japan" strategy bureau)
- Watanabe Eriko, subcommittee member
- Goto Takero, subcommittee member
- · Ito Atsushi, subcommittee member
- (2) Others

The 5th meeting February 21, 2022 (Mon.)

(1) Responses to cross-border acts of piracy

Presenters

- Wakebe Yusuke (CEO of IP FORWARD)
- Nakagawa Fuminori (Secretary general of the Association of Copyright for Computer Software)
- Suenaga Masaki (Director of the Copyright Protection and Promotion Center of Recording Industry Association of Japan)
- (2) International responses for copyright protection
- (3) Others

22nd term of the International Subcommittee in the Copyright Subdivision of the Cultural Council - Course of deliberation and list of presenters

The 1st meeting August 23, 2022 (Tues.)

- (1) Appointment of the subcommittee chief [not disclosed]
- (2) Establishment of the policy of the discussions and the working team for the 22nd term of the International Subcommittee
- (3) Latest trends in WIPO (World Intellectual Property Organization)
- (4) Survey researches implemented this fiscal year

Presenters

- Hagiwara Masafumi
 (Researcher at Mitsubishi UFJ Research and Consulting)
- (5) Others

The 2nd meeting November 21, 2022 (Mon.)

(1) Responses to copyright infringements from cross-border piracy

Presenters

- Watanabe Eriko, subcommittee member
- Ito Hideaki (Manager of the Committee on Measures against Infringement of the Association of Copyright for Computer Software)
- · Ito Atsushi, subcommittee member
- (2) Others

The 3rd meeting January 13, 2023 (Mon.)

(1) Responses to copyright infringements from cross-border piracy

Presenters

- Tsukasaki Takayuki, subcommittee member
- Morishita Mika, subcommittee member
- (2) Survey researches implemented this fiscal year

Presenters

- Hagiwara Masafumi
 (Researcher at Mitsubishi UFJ Research and Consulting)
- (3) Working team report regarding the examination of the broadcasting treaty

- (4) About the reports (draft) of the International Subcommittee in the Copyright Subdivision of the Cultural Council
- (5) Others