

GSMA DXAF Digital Transformation Leaders' CxO Summit, Tokyo JAPAN Event Summary



The GSMA DXAF Digital Transformation Leaders' CxO Summit was successfully held on 29th and 30th of November 2022 in Tokyo, Japan. The venue of the summit was at the Sheraton Miyako Hotel, Tokyo in Shirokanedai. The summit attracted over 100+ attendees, mainly CxOs, senior management executives from MNOs, governments and the digital ecosystem participating in 12 sessions over two days.



The theme of the DX Leaders' CxO Summit was on "Digital Transformation Beyond 5G" and Day 1 of the summit began with updates on the status of 5G and digital transformation from NTT DOCOMO, KDDI, Softbank and Rakuten Mobile. Sessions focused on the fundamentals of

technologies, commercial strategies and policies necessary for enabling digital transformation beyond 5G towards 6G. Day 1 also touched on the existence of the gap between expectations and reality of 5G service performance and how it should be addressed through ecosystem collaboration and government support.

Building on the foundation of Day 1, Day 2 was focused on service enabling technologies and platform strategies that introduce innovative services and accelerate digital ecosystem growth across sectors. Sessions focused on technical and commercial opportunities related to 5G private networks, the Metaverse and the importance of ecosystem collaboration between innovative startups, private and public accelerators, governments and the investment community across regions to truly enhance industry-wide digital ecosystem growth and digital transformation.



John David Kim, Head of NEA & DXAF, GSMA

Julian Gorman, Head of Asia Pacific, GSMA

Lara Dewar, Chief Marketing Officer, GSMA

The Digital Transformation Leaders' CxO Summit, Tokyo JAPAN was supported by MIC Japan with NTT DOCOMO as Lead MNO Summit Sponsor, Ericsson as Future Vision Summit Sponsor and KPMG as Industry Advisor Summit Sponsor.

Key themes of the summit

- Technology, policy and commercial fundamentals must be open and aligned to foster digital ecosystem transformation and convergence.
- 5G is one of many technical enablers and accelerators of digital transformation
- Holistic digital transformation of MNOs is necessary to provide innovative platforms and service propositions to help the digital transformation and convergence of adjacent sector ecosystems.
- Harmonized ex ante industry promotion policies play a critical role in accelerating the growth and development of innovative digital ecosystems from networks, platforms, and to services across sectors.
- ORAN technology ultimately leads to further innovation to expand the equipment supplier ecosystem and provide further economic efficiencies through network automation.
- Collaboration and strategic partnerships between MNOs, governments and ecosystem players are critical to creating a sustainable, innovative and inclusive digital ecosystem.
- The metaverse and private 5G services are definite opportunities but strategies will differ between MNOs focusing on different sectors to monetize these opportunities.

Key messages from the summit

Since commercially launching 5G services in March of 2020 with initial focus on urban area coverage, there are now more than 45 million 5G subscriptions in Japan as of 2022 between NTT Docomo, KDDI, SoftBank, and Rakuten Mobile. Alongside 5G, the number of 4G subscriptions is just over 134 million. Working with the four Japanese MNOs, the Japanese government plans reach coverage of 99 percent of the nation for 5G by FY2030 through the introduction of specific industry promotional policies.

Director General of MIC Japan

- Through enhanced deployment of infrastructure and enhanced utilization according to socio-economic demand to accelerate digitalization, the aim is for the achievement of SDGs and the realization of Society 5.0 to digitally transform Japan into Digital Garden City Nation.
- For enhanced infrastructure deployment, the targets are (1) 99.9% fiber cable household coverage by the end of FY2027, (2) 99% 5G coverage of nation by FY2030 with 600,000 base stations in total (3) development of more than a dozen regional data center bases in five years and completion of Digital Garden Superhighway around Japan in approximately three years.



Osamu Onodera, Director General of International Affairs, MIC Japan

NTT DOCOMO

- Restructuring of NTT DOCOMO's business units into (1) Enterprise Business Unit to drive structural reform of society/industry and support the digital transformation in local communities (2) Smart Life Business Unit to create new values and lifestyles (3) Consumer Communications Business Unit to enhance consumer transformation beyond expectations.
- Over 1000 deals related to 5G enterprise solutions such as (1) Remote diagnosis/education (2) Local DX / Smart City (3) Remote/Cooperative Control AGV (4) Robot construction machines (5) Abnormality detection / Remote train operation (6) Broadcasting / Advanced Entertainment, working with corporate customers across verticals.
- NTTQONOQ metaverse and digital twin business entity/subsidiary launched on Oct 1st 2022.



Naoki Tani, CTO, NTT DOCOMO

- NTT DOCOMO actively involved in leading 5G evolution and 6G powered by DOCOMO’s IOWN (Innovative Optical and Wireless Network) based on ultra-high capacity, ultra-low latency and ultra-low power technologies based on breakthrough photonics.

KDDI

- Addressing and tackling Japanese social issues such as aging social infrastructures, climate change, aging population, low birth rate, natural disasters etc., through the power of digital transformation and beyond 5G in line with government initiatives and industry/societal policies.
- Utilizing 5G SA, KDDI is digitally transforming industries like Apparel and Broadcasting.
- Setting 5G network as the baseline, KDDI is committing tenacious efforts towards “connecting the unconnected” more and more, all the time.



Hiromichi Matsuda, CSO, KDDI Corp

Softbank



Tomohiro Sekiwa, CNO, SoftBank Corp.

- For Softbank, cyber physical ecosystem will be the key to achieving and creating a sustainable society incorporating Native 5G SA, AI Digital Platform and Industrial IoT between cyber space and physical space leading to the transformation to a super-digital society.

MIC JAPAN

- The Beyond 5G Promotion Strategy’s basic principles;
 - (1) Consider the domestic market to be a part of the global market; attract global talent
 - (2) Designing systems that actively encourage free and agile efforts by diverse players
 - (3) Concentrate resources on prioritized measures to promote effective participation in global collaboration



Yutaka Kitagami, Deputy Director General, MIC Japan

- Government and private sectors collaborate under international cooperation in;
 - (1) R&D – Establish Core Technologies from around 2025
 - (2) IP & Standardization – Above 10% share of essential patents for Beyond 5G
 - (3) Deployment – Deploying networks throughout society and promoting industrial/public use through demonstrations of 5G solutions

MCMC

- The Malaysia Vision relies on policies for driving digital and beyond.
- Transforming Malaysia’s socioeconomic development through the ethical use of 4IR technologies.
- Transforming Malaysia into a knowledge-intensive economy and move up the innovation value chain.
- Talent development and preparing entrepreneurs to be equipped with 21st century skills to thrive in the digital environment.



Shamsul Majid, Chief Technology & Innovation Officer, MCMC

MSIT

- Korea’s National Digital Strategy based on;
 - (1) Secure Digital Capability through Industry-Academia-Research Cooperation
 - (2) Expanding Digital Economy through Convergence and Innovation
 - (3) Creation of an Inclusive Digital Society for every citizen
 - (4) Implementing Digital Platform Government through Public-Private Partnership
 - (5) Facilitation of Private-led Innovative Digital Culture



Jonghyeuk Lee, Director, Radio Policy Bureau, MSIT

Ericsson



Luca Orsini, President and Representative Director, Ericsson Japan

- Ericsson is working on the global 5G platform for accelerated digitization identifying opportunities in harmonization/simplification, cloud and AI, automation, scalability and flexibility. Addressing industry challenges like increased product and network complexity affected by variables such as TCO, Security, Time to Market, Revenues, ROIC and carbon footprint, it is to enhance both operational efficiency and business agility of MNOs.

KPMG

- Global technology trends are impacting how data is perceived, used and analyzed across verticals in the digital ecosystem. With the current trend of “Decentralization of everything,” the next generation internet, Web 3.0, is impacting virtual assets, services, platforms, business models and value chains across verticals. In this fast-changing environment, understanding of data, its value and preparedness is an imperative.



Darren Yong, Head of Tech, Media & Telecom, KPMG Asia Pacific

Born2Global



Jongkap Kim, Chief Executive Director, Born2Global

- Importance of fostering deep tech 5G ecosystem and digital transformation regional collaboration and partnerships between startups/companies, industries, governments and countries in the APAC and other regions to accelerate the growth of the digital ecosystem.

Next Steps

- GSMA to provide DXAF activity schedule to share all planned engagement events, both physical and virtual, and case study report plans for 2023.
- Timing, location and theme of the next physical Digital Transformation Leaders' CxO Summit to be decided and shared in Q1 of 2023.
- Invite adjacent other vertical players, startups, innovative sectors to be involved in DXAF activities to engage and collaborate for new business opportunities and partnerships.
- Gather interest topics across tech, strategy and policy related to DX, 5G and 6G to consider for DXAF activities in 2023.

Best regards

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