

Preliminary Report on the Basic Survey on the Information and Communications Industry

**2012 Basic Survey on the Information and
Communications Industry
(Performance in FY2011)**

October 31, 2012

**Global ICT Strategy Bureau
Ministry of Internal Affairs and Communications
&
Research and Statistics Department
Minister's Secretariat
Ministry of Economy, Trade and Industry**

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Chapter 1 compiles and analyses survey results on such items as the numbers of companies, establishments, and workers, as well as the financial conditions common to all business types, for the purpose of outlining the information and communications industry as a whole. For a more multidimensional consideration, survey results are compiled both from the viewpoint of the overall business activities (Section 1) and from the viewpoint of companies rated as mainly engaged in the information and communications business (Section 2).

In Chapter 2 and onward, survey items for each business type, such as sales by service type, capital investment by business type, outsourcing status, and future business operation plans, are analyzed so as to ascertain the current situation of the respective businesses comprising the information and communications industry.

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Summary of the Preliminary Report on the 2012 Basic Survey on the Information and Communications Industry

Points

- The number of companies engaged in the information and communications business was 5,371, out of which 4,643 companies were operating this as their main business.
- The total sales of these 5,371 companies from the information and communications business were 41.0781 trillion yen. The total sales of the 4,643 companies mainly engaged in this business were 38.7119 trillion yen.

Chapter 1, Section 1: Results Based on Business Activities

→ p.2, p.11

The number of companies engaged in the information and communications business (meaning companies that engage in this business, whether as their main business or not) was 5,371 and the total sales from this business were 41.0781 trillion yen (the total sales of these 5,371 companies were 62.4060 trillion yen) in FY2011. Sales from this business for companies that responded to the survey for the second consecutive year were 38.7200 trillion yen (up 1.6% compared to the previous fiscal year). Sales were the largest for the telecommunications business, followed by software, and data processing and information services. These three businesses accounted for 77.4% of the total.

Chapter 1, Section 2: Results Based on Companies Rated as Mainly Engaged in IC Business → p.3, p.17

The number of companies rated as an information and communications companies (IC companies) (meaning companies for which their sales from the information and communications business are rated as being the largest) was 4,643 and their total sales in FY2011 were 42.2705 trillion yen (sales from this business were 38.7119 trillion yen).

The sales per IC company were 9.10 billion yen (down 5.3%). The sales per IC company were the largest for telecommunications companies, followed by newspaper publishers and other publishers.

Chapter 2: Telecommunications and Broadcasting Business

→ p.4, p.24

The number of companies engaged in the telecommunications and broadcasting business was 961 and the total sales in FY2011 were 16.3025 trillion yen. Sales by companies that responded to the survey for the second consecutive year were 15.5829 trillion yen (down 0.5%). By business type, sales were 13.2555 trillion yen for the telecommunications business, 1.9025 trillion yen for the private broadcasting business, and 444.7 billion yen for the cable television broadcasting business.

Chapter 3: Broadcast Program Production Business

→ p.5, p.30

The number of companies engaged in the broadcast program production business was 299 and the total sales in FY2011 were 256.8 billion yen. Sales by companies that responded to the survey for the second consecutive year were 202.3 billion yen (up 2.4%). Business operators with capital of less than 50 million yen accounted for more than 70% and those with less than 100 workers accounted for more than 90%.

Chapter 4: Internet Based Service Business

→ p.6, p.34

The number of companies engaged in the Internet based service business was 523. The total sales in FY2011 were 1.2550 trillion yen (up 6.9%), for the second consecutive year of increase. Sales by companies that responded to the survey for the second consecutive year were 1.0999 trillion yen (up 13.4%).

The sales per company increased to 2.40 billion yen (up 4.9%).

Chapter 5: Information Service Business

→ p.7, p.38

The number of companies engaged in the information service business was 3,312. The total sales in FY2011 were 13.0975 trillion yen (up 8.0%), for the second consecutive year of increase. Sales by companies that responded to the survey for the second consecutive year were 11.4603 trillion yen (up 3.7%). By sector, custom software service companies accounted for the majority.

The sales per company increased to 3.95 billion yen (up 0.3%) for the second consecutive year.

Chapter 6: Video Picture, Sound Information, Character Information Production and Distribution Business

→ p.8, p.44

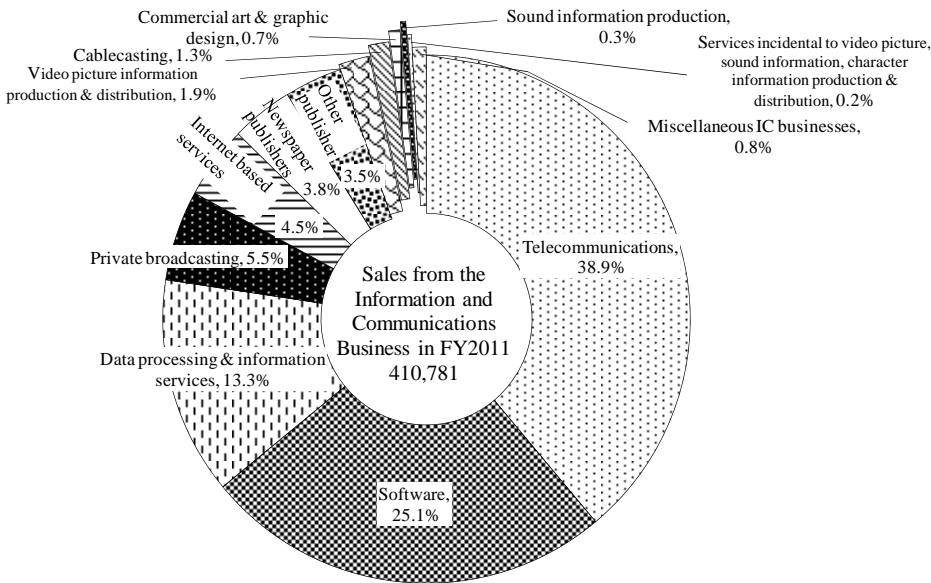
The number of companies engaged in the video picture, sound information, character information production and distribution business was 613. The total sales in FY2011 were 2.5959 trillion yen (up 16.7%), for the second consecutive year of increase. Sales by companies that responded to the survey for the second consecutive year were 2.0070 trillion yen (0.0 points difference). By sector, newspaper publishers accounted for the majority.

The sales per company were 4.23 billion yen (down 8.8%) and all sectors except newspaper publishers decreased.

Points of Chapter 1, Section 1: Results Based on Business Activities

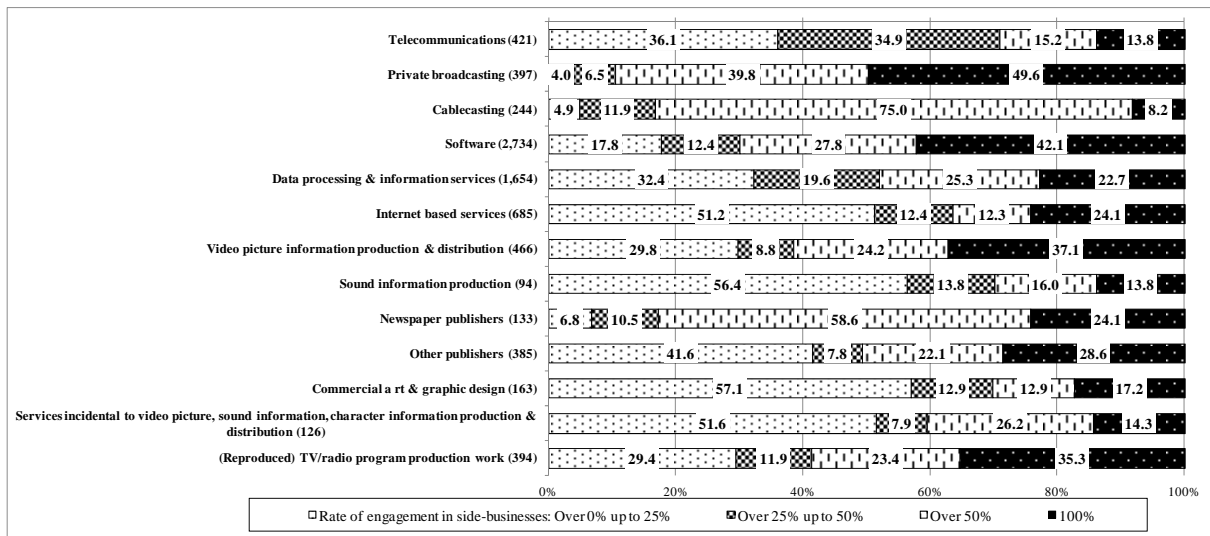
- The total number of companies engaged in the information and communications business (meaning companies that engage in this business, whether as their main business or not) was 5,371 and the total sales from this business were 41.0781 trillion yen (the total sales of these 5,371 companies were 62.4060 trillion yen) in FY2011.
- Sales were the largest for the telecommunications business, followed by the software business, and the data processing and information services. These three businesses accounted for 77.4% of the total.
- Looking at the composition ratios of companies in this business by rate of engagement in side-businesses, in all 12 business types, over 50% of companies also operated other businesses concurrently. In particular, 91.8% of cablecasting companies, and 86.2% of telecommunication and sound information production companies were engaged in side-businesses.

Sales from the Information and Communications Business in FY2011



	Number of companies	Sales from the relevant business Sales (100 million yen)	Composition ratio (%)
Overall	5,371	410,781	100.0
Telecommunications	421	159,925	38.9
Software	2,734	103,127	25.1
Data processing & information services	1,654	54,822	13.3
Private broadcasting	397	22,759	5.5
Internet based services	685	18,287	4.5
Newspaper publishers	133	15,656	3.8
Other publishers	385	14,515	3.5
Video picture information production & distribution	466	7,844	1.9
Cablecasting	244	5,176	1.3
Commercial art & graphic design	163	2,846	0.7
Sound information production	94	1,343	0.3
Services incidental to video picture, sound information, character information production & distribution	126	1,012	0.2
Miscellaneous IC businesses	-	3,468	0.8

Composition Ratios by Rate of Engagement in Side-businesses



Note: Rate of engagement in side-businesses: Sales from the relevant business/Total sales of the company × 100

**Points of Chapter 1, Section 2:
Results Based on Companies Rated as Mainly Engaged in the IC Business**

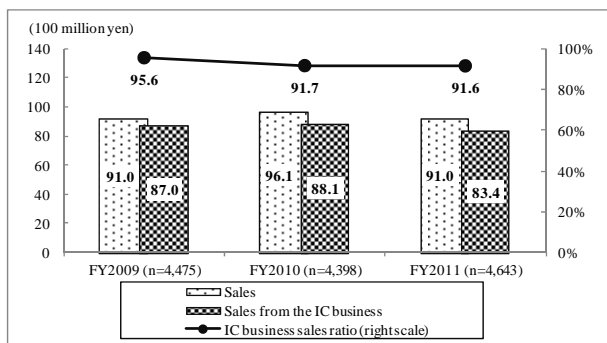
- Looking at companies rated as information and communications companies (IC companies) (meaning companies for which their sales from the information and communications business are rated as being the largest), per IC company, the number of establishments was 3.5 (down 0.2 establishments), the number of regular workers was 224 (down 7.1%).
- The sales per IC company were 9.10 billion yen (down 5.3%). The sales from the information and communications business were 8.34 billion yen (down 5.4%), making up 91.6% of sales (down 0.1 points).
- The operating profit per IC company was 900 million yen (up 15.0%), and ordinary profit per IC company was 790 million yen (up 0.2%). Current net income per IC company was 440 million yen (down 1.0%).

Outline (Per Company)

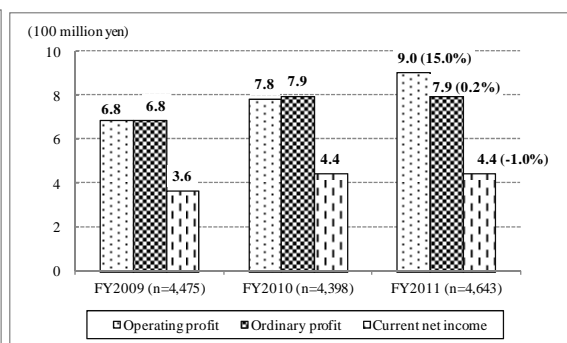
		Number of establishments	Number of workers (persons)	Number of regular workers (persons)	Sales (million yen)	Sales from the IC business (million yen)	Operating profit (million yen)	Ordinary profit (million yen)
Total	FY2010	4.5	290	288	12454.7	8126.1	876.3	865.4
	FY2011	4.4	265	263	11619.1	7648.1	843.6	736.0
	Year-on-year (%)	-0.1	-8.6	-8.7	-6.7	-5.9	-3.7	-15.0
IC companies	FY2010	3.7	242	241	9612.4	8813.3	784.0	792.6
	FY2011	3.5	225	224	9104.1	8337.7	901.6	793.9
	Year-on-year (%)	-0.2	-7.0	-7.1	-5.3	-5.4	15.0	0.2
Telecommunications	FY2010	6.6	932	930	128998.7	122359.8	15233.0	15135.4
	FY2011	5.9	843	840	126295.0	119981.9	15998.5	16211.1
	Year-on-year (%)	-0.7	-9.5	-9.7	-2.1	-1.9	5.0	7.1
Private broadcasting	FY2010	3.2	100	93	7472.0	7215.1	443.2	472.0
	FY2011	2.8	79	77	6880.9	6652.3	452.7	481.7
	Year-on-year (%)	-0.4	-21.0	-17.2	-7.9	-7.8	2.1	2.1
Cablecasting	FY2010	1.6	57	57	3290.1	3273.9	368.4	348.3
	FY2011	2.5	80	80	3936.0	3557.5	507.5	354.1
	Year-on-year (%)	0.9	40.4	40.4	19.6	8.7	37.8	1.7
Software	FY2010	2.9	246	246	5410.5	4682.5	284.0	286.9
	FY2011	2.8	237	237	5341.7	4599.8	287.6	288.8
	Year-on-year (%)	-0.1	-3.7	-3.7	-1.3	-1.8	1.3	0.7
Data processing & information services	FY2010	4.9	319	318	7409.0	6558.6	421.1	433.5
	FY2011	4.5	302	302	6594.2	5859.9	490.5	418.6
	Year-on-year (%)	-0.4	-5.3	-5.0	-11.0	-10.7	16.5	-3.4
Internet based services	FY2010	2.3	151	150	4895.8	4552.4	635.7	626.9
	FY2011	2.3	139	138	4734.4	4481.2	1014.3	626.1
	Year-on-year (%)	0.0	-7.9	-8.0	-3.3	-1.6	59.6	-0.1
Video picture information production & distribution	FY2010	1.7	74	73	2612.1	2288.5	134.8	168.9
	FY2011	1.7	70	68	2506.9	2177.9	151.3	173.4
	Year-on-year (%)	0.0	-5.4	-6.8	-4.0	-4.8	12.2	2.7
TV program production	FY2010	1.5	62	61	1607.0	1490.7	52.5	73.6
	FY2011	1.5	62	61	1881.4	1718.3	99.4	110.5
	Year-on-year (%)	0.0	0.0	0.0	17.1	15.3	89.3	50.1
Sound information production	FY2010	1.5	52	52	4510.6	4151.3	370.4	388.4
	FY2011	1.8	56	55	6562.5	6008.5	543.8	540.7
	Year-on-year (%)	0.3	7.7	5.8	45.5	44.7	46.8	39.2
Radio program production	FY2010	1.2	23	22	312.3	308.3	6.4	7.5
	FY2011	1.4	21	20	300.6	299.5	19.1	14.0
	Year-on-year (%)	0.2	-8.7	-9.1	-3.7	-2.9	198.4	86.7
Newspaper publishers	FY2010	21.3	452	447	19133.6	17417.6	470.7	571.0
	FY2011	17.6	364	358	15554.1	14005.3	479.8	558.3
	Year-on-year (%)	-3.7	-19.5	-19.9	-18.7	-19.6	1.9	-2.2
Other publishers	FY2010	4.6	232	223	10180.2	9830.2	655.0	749.7
	FY2011	4.0	159	158	7667.5	7489.3	2014.4	256.1
	Year-on-year (%)	-0.6	-31.5	-29.1	-24.7	-23.8	207.5	-65.8
Commercial art & graphic design	FY2010	2.1	51	51	1334.8	1245.6	172.7	29.1
	FY2011	2.2	49	49	1278.9	1239.1	58.4	60.6
	Year-on-year (%)	0.1	-3.9	-3.9	-4.2	-0.5	-66.2	108.2
Services incidental to video picture, sound information, character information production & distribution	FY2010	4.2	90	90	1617.6	1404.1	-42.5	-31.2
	FY2011	3.6	91	90	1915.6	1534.3	39.4	50.5
	Year-on-year (%)	-0.6	1.1	0.0	18.4	9.3	-	-

(Note) The year-on-year comparison for the number of establishments per company represents the difference as compared to the previous fiscal year

Sales per IC Company



Profit per IC Company



(Note) Figures in parentheses represent the difference from the previous fiscal year. Calculated in 1 million yen units.

Points of Chapter 2: Telecommunications and Broadcasting

- The total sales in the telecommunications and broadcasting business were 16.3025 trillion yen in FY2011. Among this, sales by companies that responded to the survey for the second consecutive year were 15.5829 trillion yen (down 0.5%). Looking at sales in FY2011 by business type, sales were 13.2555 trillion yen for the telecommunications business, 1.9025 trillion yen for the private broadcasting business, and 444.7 billion yen for the cable television broadcasting business.
- Looking at the composition ratio of sales in the telecommunications business, the percentage of data transmission continued to increase, and sound transmissions were on the decrease.
- With regard to companies that intend to start new businesses within one year, telecommunications and cable television broadcasting businesses intending to start the wireless internet access field were up 9.4 points and 8.9 points respectively. Private broadcasting businesses intending to start internet advertising were up 3.3 points.

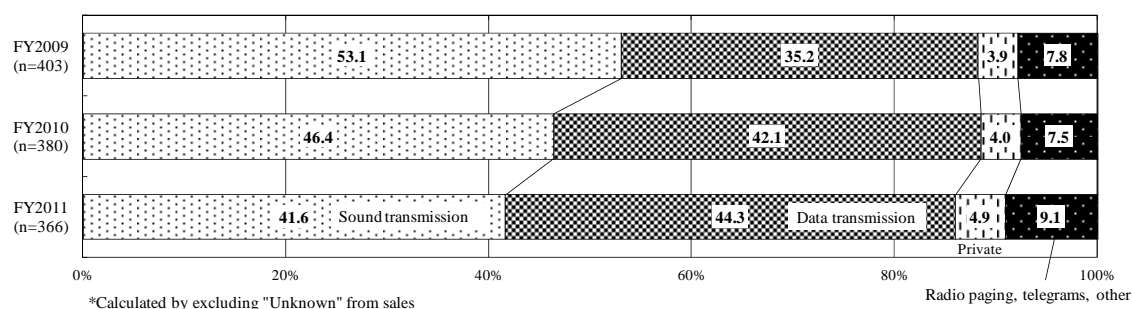
Sales of Telecommunications and Broadcasting Business

(unit: companies, 100 million yen)

Classification	FY2011		Companies that responded to the survey for the second consecutive year				
	Number of companies	Sales	FY2010		FY2011		Year-on-year (%)
			Number of companies	Sales	Number of companies	Sales	
Overall	961	163,025	737	156,610	737	155,829	-0.5
Telecommunications	366	132,555	267	129,149	267	127,911	-1.0
Broadcasting	595	30,470	470	27,460	470	27,918	1.7
Private broadcasting	370	19,025	294	17,350	294	17,485	0.8
Cable television broadcasting	224	4,447	175	3,270	175	3,437	5.1
NHK	1	6,997	1	6,840	1	6,997	2.3

*Data for NHK are based on publicized materials

Changes in the Breakdown of Sales of Telecommunications Business (By Sound or Data Transmission)



New Businesses that Companies Intend to Start within One Year (multiple answers allowed)

Telecommunications

Private broadcasting

Cable television broadcasting

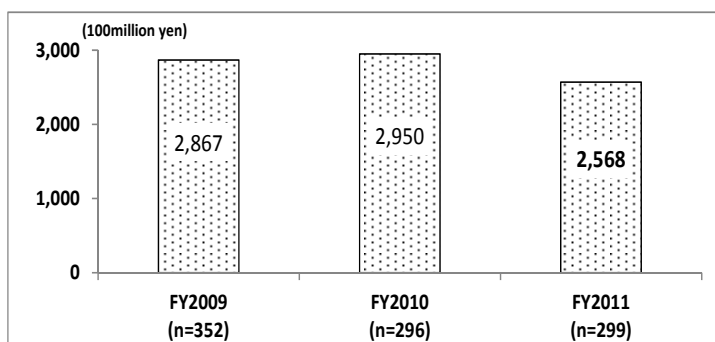
New businesses that companies intend to start within one year		FY2010 (n=173)	FY2011 (n=148)	New businesses that companies intend to start within one year		FY2010 (n=97)	FY2011 (n=100)	New businesses that companies intend to start within one year		FY2010 (n=103)	FY2011 (n=100)
Wireless Internet access		19.7	29.1	Internet advertising		24.7	28.0	Wireless Internet access		30.1	39.0
FTTH services		22.0	25.7	Web contents delivery		38.1	25.0	FTTH services		35.9	38.0
Cloud computing services		24.9	19.6	Of which, IPTV services				Web contents delivery		10.7	14.0
Other Internet based services		10.4	17.6	(Internet video delivery)		9.3	9.0	Of which, IPTV services			
Internet advertising		9.8	10.8	Internet mail order services		13.4	16.0	(Internet video delivery)		2.9	10.0
Web contents delivery		6.9	10.1	Operation of an Internet shopping site		10.3	12.0	Other Internet based services		9.7	14.0
Of which, IPTV services				Production of digital contents other than Web sites		16.5	11.0	Cable Internet		4.9	12.0
(Internet video delivery)		2.9	6.1	Other Internet based services		11.3	9.0	Of which, IPTV services			
Internet mail order services		6.4	7.4	Provision of digital contents other than Web sites		14.4	9.0	(Internet video delivery)		3.9	10.0
Cable Internet		2.9	6.8	Electronic bulletin board services, blog services, and SNS operation		5.2	8.0	Internet advertising		13.6	12.0
Of which, IPTV services				Consulting		4.1	7.0	Operation of an Internet shopping site		2.9	8.0
(Internet video delivery)		2.9	5.4	Cable Internet		9.3	6.0	Internet mail order services		5.8	8.0
Operation of an Internet shopping site		4.0	6.8	Of which, IPTV services				Electronic authentication services		1.0	6.0
Electronic authentication services		1.2	6.8	(Internet video delivery)		6.2	5.0	Cloud computing services		4.9	4.0
Server management consignment		8.7	6.8	Equipment maintenance, repair, and management		5.2	6.0	Information and telecommunications equipment sales		1.9	4.0
Information and telecommunications equipment sales		4.6	6.8	Other		12.4	23.0	Other		16.5	17.0
Other		11.0	13.5								

(Note) Values represent the ratio of companies that responded that they were intending to start new businesses within one year.

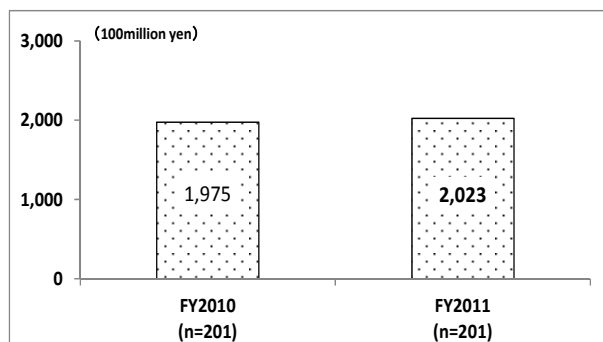
Points of Chapter 3: Broadcast Program production

- The total sales in FY2011 were 256.8 billion yen, among which the total sales by companies that responded to the survey for the second consecutive year were 202.3 billion yen (up 2.4%).
- With regard to broadcast programs for which secondary use is possible based on a company's own intent, the percentage of broadcast program producers that are actually carrying out secondary use increased to 75.6% (up 2.5 points).
- The rate of digitalization of instruments used for broadcast program production exceeded 80% for VTRs, cameras, and editing machines. Editing machines accounted for over 90% of digitalization.

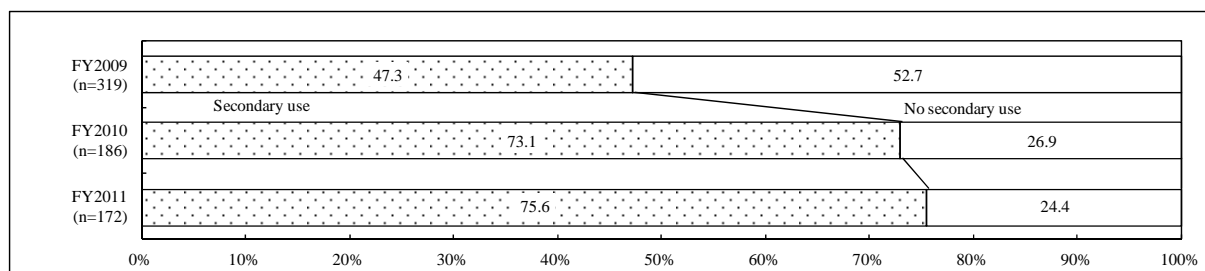
Sales in the Broadcast Program Production Business



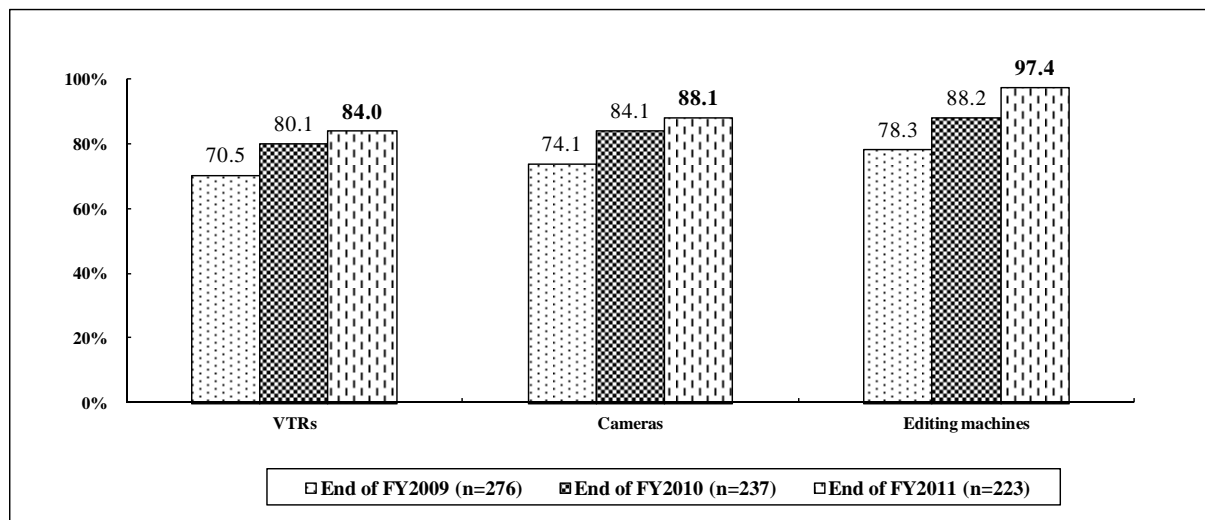
Changes in Sales of Companies that Responded to the Survey for the Second Consecutive Year



Secondary Use of Television Broadcast Programs



Changes in Digitalization Ratios of instruments Used for Broadcast Program Production



Points of Chapter 4: Internet Based Services

- The total sales in FY2011 were 1.2550 trillion yen (up 6.9%). The sales per company were 2.40 billion yen (up 4.9%).
- Looking at sales per company by service type, sales were the largest for charging/settlement agent services, followed by other internet based services, and shopping site operation and auction site operation.
- Regarding new business fields that companies intend to start within one year, the most common answer was “cloud computing services,” followed by “Web contents delivery” and “Internet advertising.”

Number of Companies and Sales by Service Type

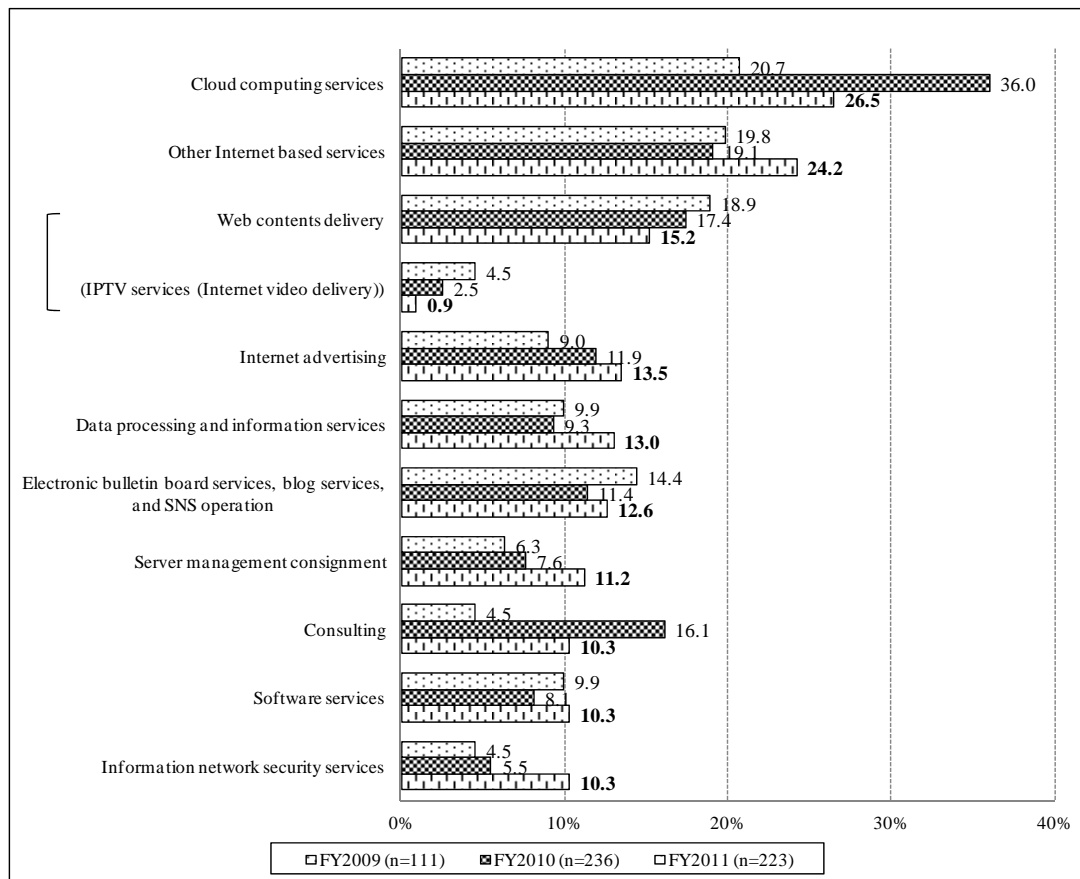
	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)
Total	513	523	1.9	1,173,638	1,254,984	6.9	2,287.8	2,399.6	4.9
Web information search services	61	55	-9.8	210,764	96,640	-54.1	3,455.1	1,757.1	-49.1
Shopping site operation and auction site operation	75	70	-6.7	149,554	152,310	1.8	1,994.1	2,175.9	9.1
Electronic bulletin board services, blog services, and SNS operation	25	20	-20.0	84,378	11,604	-86.2	3,375.1	580.2	-82.8
Web contents delivery services	136	149	9.6	206,737	173,540	-16.1	1,520.1	1,164.7	-23.4
Revenue from IPTV services	11	11	0.0	4,827	5,465	13.2	438.8	496.8	13.2
Cloud computing services	107	116	8.4	59,230	76,157	28.6	553.6	656.5	18.6
Electronic authentication services	13	13	0.0	5,080	12,228	140.7	390.8	940.6	140.7
Information network security services	56	59	5.4	68,865	41,399	-39.9	1,229.7	701.7	-42.9
Charging/settlement agent services	12	15	25.0	32,152	119,698	272.3	2,679.3	7,979.9	197.8
Server management consignment	96	109	13.5	69,172	43,704	-36.8	720.5	401.0	-44.3
Other Internet based services	170	161	-5.3	287,706	386,080	34.2	1,692.4	2,398.0	41.7
(Special tabulation) Companies that responded to the survey for the second consecutive year	378	378	-	970,295	1,099,882	13.4	2,566.9	2,909.7	13.4

(Notes) As some companies operate multiple services businesses, the total number of companies does not necessarily match the sum of the breakdown figures.

As some companies do not provide data on the breakdown of sales, the numbers for total sales and the sum of the breakdown do not match.

"Shopping site operation and auction site operation" refer to Internet shopping site operation and Internet auction site operation businesses.

New Businesses that Companies Intend to Start within One Year (multiple answers allowed)



(Notes) Figures are obtained by dividing the number of responses by the number of companies that provided valid responses to this question.

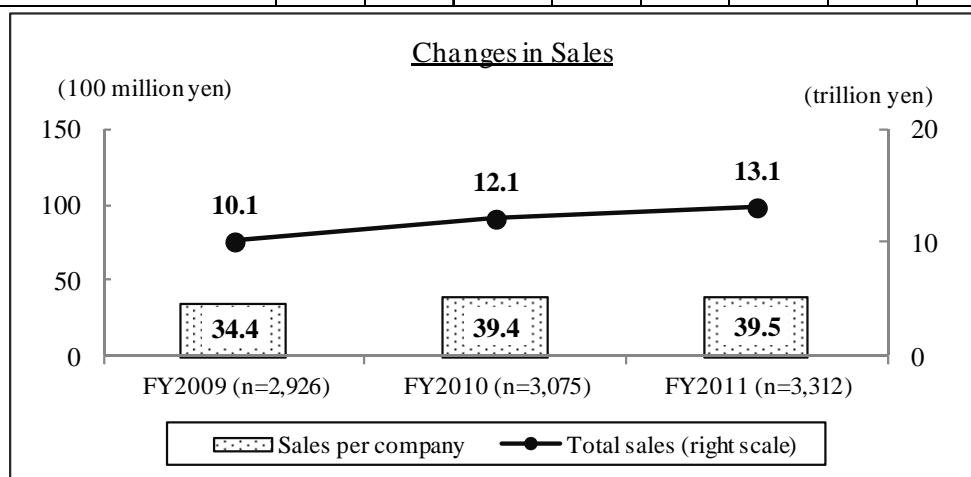
For "Cloud computing services" for FY2009, the values tabulated as "ASP: SaaS" are used.

Points of Chapter 5: Information Services

- The total sales in FY2011 were 13.0975 trillion yen (up 8.0%), for the second consecutive year of increase. The sales were the largest for custom software service companies, followed by data processing service companies.
- The sales per company were 3.95 billion yen (up 0.3%), with increases by game software service companies, package software service companies and others.
- Looking at the percentage of the number of companies according to primary contractors and subcontractors, the percentage of primary contractors increased for the second consecutive year. By capital, the percentage of primary contractors increased, and the percentage of subcontractors decreased as capital was larger.

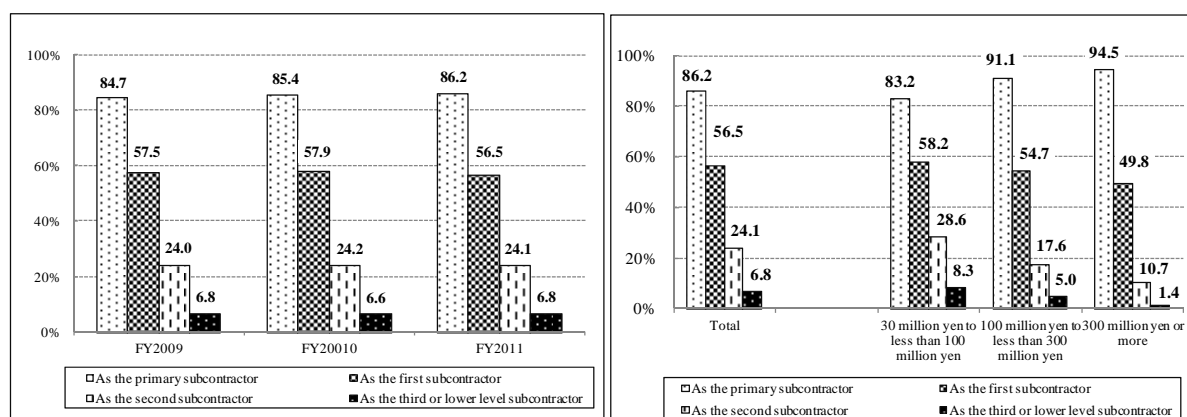
Number of Companies and Sales by Sector (Based on Companies' Main Business)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)
Total	3,075	3,312	7.7	12,128,748	13,097,536	8.0	3,944.3	3,954.6	0.3
Custom software service companies	1,565	1,636	4.5	6,201,332	6,319,914	1.9	3,962.5	3,863.0	-2.5
Embedded software service companies	107	111	3.7	172,363	161,735	-6.2	1,610.9	1,457.1	-9.5
Package software service companies	255	261	2.4	326,508	342,935	5.0	1,280.4	1,313.9	2.6
Game software service companies	52	62	19.2	145,596	296,949	104.0	2,799.9	4,789.5	71.1
Data processing service companies	575	627	9.0	2,933,634	2,999,287	2.2	5,102.0	4,783.6	-6.2
Research & information service companies	139	141	1.4	285,163	246,041	-13.7	2,051.5	1,745.0	-14.9
Miscellaneous information service companies	382	474	24.1	2,064,152	2,730,675	32.3	5,403.5	5,760.9	6.6
(Special tabulation) Companies that responded to the survey for the second consecutive year	2,608	2,608	-	11,055,871	11,460,320	3.7	4,239.2	4,394.3	3.7



Primary Contractors and Subcontractors

[Percentage of Number of Contractors and Subcontractors] [Percentage of Number of Companies by Capital]



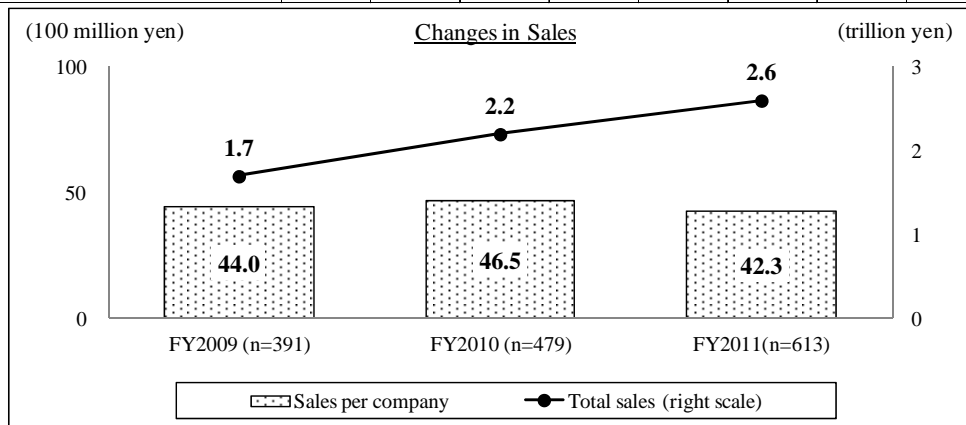
(Note) Multiple answers were allowed for implementation of primary contractors and subcontractors; numbers are counted using the number of companies for which there were valid responses.

Point of Chapter 6:
Video Picture, Sound Information, Character Information Production and Distribution

- The total sales in FY2011 were 2.5959 trillion yen (up 16.7%), for the second consecutive year of increase. The sales were the largest for newspaper publishers, followed by other publishers, and commercial art and graphic design companies.
- The sales per company were 4.23 billion yen (down 8.8%) and all sectors except newspaper publishers decreased.
- Looking at the rights held concerning produced contents (major sectors), the percentage of newspaper publishers that held the full rights for primary use was high at 98.9%, while the percentage of motion picture & video production companies that held the full rights for secondary use was low at 26.4%.

Number of Companies and Sales by Sector (Based on Companies' Main Business)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)
Total	479	613	28.0	2,224,986	2,595,904	16.7	4,645.1	4,234.8	-8.8
Motion picture & video production companies	59	52	-11.9	162,198	85,088	-47.5	2,749.1	1,636.3	-40.5
Animation production companies	10	16	60.0	16,506	24,213	46.7	1,650.6	1,513.3	-8.3
Recording and disk production companies	4	14	250.0	20,400	45,047	120.8	5,100.0	3,217.6	-36.9
Newspaper publishers	67	96	43.3	667,918	1,022,915	53.1	9,968.9	10,655.4	6.9
Other publishers	150	219	46.0	757,324	827,928	9.3	5,048.8	3,780.5	-25.1
Commercial art and graphic design companies	92	113	22.8	372,272	414,190	11.3	4,046.4	3,665.4	-9.4
Motion picture, video & TV program distribution companies	20	12	-40.0	117,420	65,050	-44.6	5,871.0	5,420.8	-7.7
Service companies incidental to video picture, sound information, character information production & distribution	77	91	18.2	110,948	111,473	0.5	1,440.9	1,225.0	-15.0
(Special tabulation) Companies that responded to the survey for the second consecutive year	348	348	-	2,007,775	2,007,023	0.0	5,769.5	5,767.3	0.0

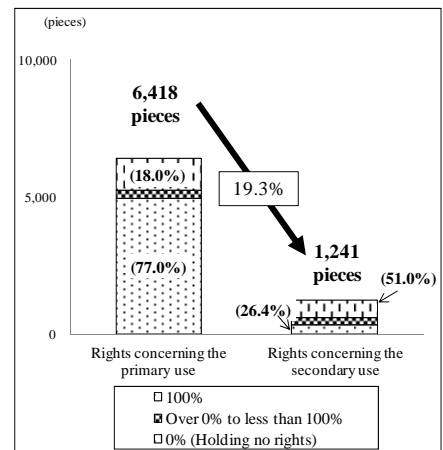
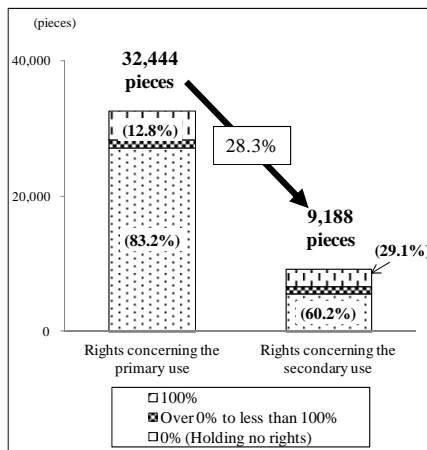
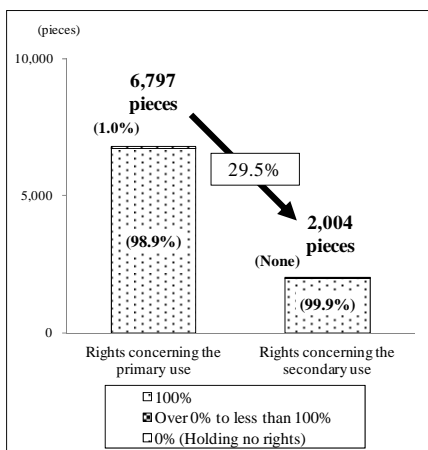


Holding of Rights for Produced Contents (Major Sectors)

[Newspaper publishers]

[Other publishers]

[Motion picture & video production companies]



(Note) Figures inside the boxes (%) represent the percentage of contents for which secondary use was performed. Figures inside the parentheses represent composition ratios in relation to the number of pieces of contents produced

Notes on Use

The Ministry of Internal Affairs and Communications and the Ministry of Economy, Trade and Industry conducted the 2012 Basic Survey on the Information and Communications Industry as of March 31, 2012, and have compiled and published the results as a preliminary report. The outline of the survey and the notes for use of the statistical tables are as follows.

(Terms)

- “Regular workers” refer to paid directors and regularly employed people (people, regardless of their title as a full-time worker, regular staff member, part-timer, temporary or contract workers, etc. employed under a contract longer than one month, or persons employed for 18 days or more each month in the two months prior to the end of the 2011 fiscal year or the latest accounting term).
- “Full-time workers/regular staff members” refer to workers generally referred to as full-time workers/regular staff members.
- “Part-timers” refer to regular workers whose scheduled daily working hours or number of working days in a week are shorter than that of full-time workers/regular staff members.
- “Workers transferred to other companies” refer to workers who are transferred to parent companies, subsidiaries, affiliate companies, etc. in Japan or overseas, and who are being paid a salary mainly by the company from which they are being transferred (the said company is mainly responsible for paying the workers’ salaries).
- “Temporary or daily workers” refer to people who are employed for a period of up to one month, or those who are brought in on a daily basis. They are not included in regular workers.
- “Dispatched workers” refer to workers who are employed by a worker-dispatching business operator and are engaged in an accepting company's operations under its supervision and command, based on a contract between the accepting company and the worker-dispatching business operator, under the aforementioned employment relationship. They are not included in the total number of workers of the accepting company.
- “Workers” refer to the combination of “regular workers” and “temporary or daily workers.”
- A “subsidiary” is a company in which a certain company (parent company) owns more than 50% of the voting rights. It includes a company in which the subsidiary, or the parent company and the subsidiary combined, own more than 50% of the voting rights (deemed subsidiary) and a company practically controlled by the subsidiary or jointly by the parent company and the subsidiary even in the case they own only 50% or less of the voting rights.
- An “affiliated company” is a company in which a certain company directly owns no less than 20% but no more than 50% of the voting rights.
- In this report, the “telecommunications business” shows data only for the communications business, and the “telecommunications and broadcasting business” shows the total of the telecommunications business and the broadcasting business.
- “(Reproduced) TV/radio program production work” indicates the total of TV program production work and radio program production work among the overall video picture, sound information, character information production and distribution work.
- “Companies that responded to the survey for the second consecutive year” refer to companies that provided responses to both the previous survey and this survey.

(Figures)

- In the tables, “-” means that there is no applicable number and “0” means that the figure is under the unit.
- In the tables, “X” means that the value was kept confidential since the number of companies was two or less. In addition, areas where it is possible to determine confidential values from the surrounding context even if the number of companies is three or more, such values are kept confidential.
- All figures show the total of valid responses for each item
- As figures and composition ratios round off digits under the units, and there may be cases with no responses in the breakdown, the aggregated amount does not necessarily match the total.
- The numbers of companies, establishments, workers, and subsidiaries are those at the end of FY2011 and sales are the performance of the entirety of FY2011.
- Breakdown data of the “number of regular workers” (“Full-time workers/Regular staff members,” etc.) do not match the total. The difference includes the numbers of paid directors and contract workers, etc.
- ◯◯%-point differences from the previous fiscal year are expressed as “◯◯ points.”

(Other)

- This preliminary report shows the results obtained from questionnaires collected as of the end of August 2012, and the final report compiled based on all valid responses will be publicized in March 2013.
- As only valid responses are counted, the number of companies that submitted a response varies by item. Furthermore, as each type of survey form was sent to and collected from different companies, the number

- of responding companies varies by Chapter even for the same type of business.
- Chapter 1 compiles the survey results regarding all companies engaged in the information and communications business, both from the viewpoint of companies' business activities (Results Based on Business Activities) and from the viewpoint of companies' main business (Results Based on Companies Rated as Mainly Engaged in the IC Business). The entirety of activity-based results matches the total on the basis of companies rated as mainly engaged in the information and communications business.
 - Results based on business activities in Chapter 1, Section 1 are created by focusing on the contents of activities run by companies. In cases where companies are engaged in side businesses, figures (number of establishments, number of workers, etc.) for the company as a whole in the respective business types are tabulated.
(For example, if a responding company is engaged in the telecommunications business and the software business, its figures are tabulated respectively in telecommunications and software in tables and diagrams.) Accordingly, the total of each business sector does not match the figure for "overall."
 - The results based on business activities in Chapter 1, Section 2 are created by rating companies in the business sector where they have the largest sales. Large classifications ("Information and Communications," "Manufacturing," "Wholesale and Retail Trade," etc.) are determined based on the area in which companies' have the largest sales. Within these large classifications, sales are compared based on small classifications, and main businesses (small classifications) ("telecommunications," "private broadcasting," etc.) are determined based on the largest sales.
(For example, if a responding company is engaged in the telecommunications business and the software business, when sales are larger from the telecommunications business, tabulations are made by rating the company as a telecommunications company; the total amount and the total of each business match.)
 - It should be noted that since the numbers of valid responses vary for each year that the survey was conducted, care should be exercised when making inter-annual comparisons.
 - In Chapter 2, survey results are compiled by business type. Therefore, companies engaged in multiple businesses are included either in the total of the telecommunications and broadcasting business or in the broadcasting business.
 - In Chapter 6, data for the video picture, sound information, character information production and distribution work are compiled without those for the TV program production work and the radio program production work.
 - The Japan Broadcasting Corporation (NHK) is not covered by this survey, but data for some related parts are cited from materials publicized by NHK ("Inventory, Balance Sheet, Profit and Loss Statement, Statement of Changes in Net Assets, Cash Flow Statement, and Written Explanations Thereof (NHK)."
 - For companies with capital of 500 million yen or more that had submitted questionnaires for the annual survey for the "Financial Statements Statistics of Corporations by Industry" conducted by the Ministry of Finance, part of the data for this survey's "Assets, Liabilities and Capital" and "Sales and Expenses" in the Survey on Items Common to All Business Types (Survey Questionnaire (I)) are based on said data collected by the Ministry of Finance.
 - For companies with 50 or more workers and with capital or contributions of 30 million yen or more that had submitted questionnaires for the "Basic Survey of Japanese Business Structures and Activities" conducted by the Ministry of Economy, Trade and Industry, all data for the Survey on Items Common to All Business Types (Survey Questionnaire (I)) are based on said data collected by the Ministry of Economy, Trade and Industry.
 - When reprinting figures listed in this report onto other media, please cite the "Preliminary Report on the 2012 Basic Survey on the Information and Communications Industry" (Ministry of Internal Affairs and Communications/Ministry of Economy, Trade and Industry)."

(Collection)

Questionnaire type		Companies to which the questionnaire was sent	Companies that submitted a response	Response rate	Companies that gave a valid response
Questionnaire (I) (Common Survey)		9,072	6,174	68.1%	5,371
Survey on Items for Each Business Type	(II) (Telecommunications and Broadcasting)	1,431	898	62.8%	739
	(III) (Broadcast Program Production)	814	377	46.3%	299
	(IV) (Internet Based Service)	1,323	739	55.9%	523
	(V) (Information Service)	5,731	3,801	66.3%	3,312
	(VI) (Video Picture, Sound Information, Character Information Production and Distribution)	1,591	842	52.9%	613

Chapter 1 Outline of Companies Engaged in the Information and Communications Business

Section 1: Results Based on Business Activities

1. Overall Outline of Survey Results

- The number of companies engaged in the information and communications business (meaning companies that engages in this business, whether as their main business or not) was 5,371. The total number of establishments was 23,604 and the total number of workers was 1,422,066.
- The total sales from this business were 41.0781 trillion yen (the total sales for these 5,371 companies were 62.4060 trillion yen) in FY2011. Among this, total sales from this businesses by companies that responded to the survey for the second consecutive year were 38.7200 trillion yen (up 1.6%).
- The operating profit was 4.5308 trillion yen, the ordinary profit was 3.9531 trillion yen, and the number of subsidiaries and affiliated companies owned was 8,264.

Fig. 1-1-1 Overall Outline

		Number of companies	Number of establishments	Number of workers (persons)	Number of regular workers (persons)	Sales	Sales from the relevant business	Operating profit (100 million yen)	Ordinary profit (100 million yen)	Number of subsidiaries and affiliated companies owned
						(100 million yen)	(100 million yen)			
Overall	FY2010	5,093	23,049	1,475,349	1,467,418	634,320	413,861	44,630	44,075	8,160
	FY2011	5,371	23,604	1,422,066	1,414,237	624,060	410,781	45,308	39,531	8,264
	Year-on-year (%)	5.5	2.4	-3.6	-3.6	-1.6	-0.7	1.5	-10.3	1.3
Telecommunications	FY2010	407	2,547	255,479	255,216	253,840	162,576	25,885	24,499	1,164
	FY2011	421	2,172	204,211	203,643	196,742	159,925	23,813	23,508	709
	Year-on-year (%)	3.4	-14.7	-20.1	-20.2	-22.5	-1.6	-8.0	-4.0	-39.1
Private broadcasting	FY2010	380	1,450	42,603	40,090	28,398	22,787	1,774	1,907	672
	FY2011	397	1,407	37,395	36,874	27,775	22,759	1,847	1,994	541
	Year-on-year (%)	4.5	-3.0	-12.2	-8.0	-2.2	-0.1	4.1	4.5	-19.5
Cablecasting	FY2010	229	391	14,871	14,644	8,437	4,628	1,033	963	107
	FY2011	244	612	21,710	21,497	10,681	5,176	1,821	1,011	81
	Year-on-year (%)	6.6	56.5	46.0	46.8	26.6	11.8	76.2	5.0	-24.3
Software	FY2010	2,687	9,455	749,889	748,313	185,013	103,627	8,417	8,756	3,160
	FY2011	2,734	9,696	732,913	731,534	184,339	103,127	9,512	8,700	3,436
	Year-on-year (%)	1.7	2.5	-2.3	-2.2	-0.4	-0.5	13.0	-0.6	8.7
Data processing & information services	FY2010	1,554	8,361	566,190	564,688	168,220	56,591	6,933	7,453	2,563
	FY2011	1,654	8,839	536,083	533,528	161,436	54,822	8,364	7,550	2,871
	Year-on-year (%)	6.4	5.7	-5.3	-5.5	-4.0	-3.1	20.6	1.3	12.0
Internet based services	FY2010	674	4,118	252,839	250,342	124,290	17,006	9,852	8,800	1,449
	FY2011	685	4,323	228,095	226,503	124,084	18,287	8,297	2,086	1,286
	Year-on-year (%)	1.6	5.0	-9.8	-9.5	-0.2	7.5	-15.8	-76.3	-11.2
Video picture information production & distribution	FY2010	462	1,169	50,821	48,199	26,703	8,137	1,466	1,670	676
	FY2011	466	1,325	60,839	60,000	41,487	7,844	2,146	2,205	854
	Year-on-year (%)	0.9	13.3	19.7	24.5	55.4	-3.6	46.4	32.0	26.3
Sound information production	FY2010	71	113	4,176	4,072	2,128	968	133	142	25
	FY2011	94	169	8,209	8,152	3,498	1,343	319	331	58
	Year-on-year (%)	32.4	49.6	96.6	100.2	64.4	38.7	140.7	133.3	132.0
Newspaper publishers	FY2010	115	2,186	46,278	45,802	19,236	16,130	484	590	688
	FY2011	133	2,129	44,541	43,778	18,730	15,656	575	668	652
	Year-on-year (%)	15.7	-2.6	-3.8	-4.4	-2.6	-2.9	18.8	13.2	-5.2
Other publishers	FY2010	320	3,345	124,002	120,431	50,322	14,671	2,311	2,395	1,107
	FY2011	385	3,219	90,603	89,531	40,651	14,515	5,558	2,122	931
	Year-on-year (%)	20.3	-3.8	-26.9	-25.7	-19.2	-1.1	140.5	-11.4	-15.9
Commercial art & graphic design	FY2010	111	240	14,174	14,165	16,492	2,332	504	527	220
	FY2011	163	464	20,978	20,460	18,127	2,846	477	568	266
	Year-on-year (%)	46.8	93.3	48.0	44.4	9.9	22.0	-5.4	7.9	20.9
Services incidental to video picture, sound information, character information production & distribution	FY2010	104	330	9,754	9,708	2,327	691	62	63	66
	FY2011	126	438	15,854	15,659	5,627	1,012	442	461	126
	Year-on-year (%)	21.2	32.7	62.5	61.3	141.8	46.5	615.2	627.8	90.9
(Reproduced) TV/radio program production work	FY2010	377	607	23,451	23,028	7,377	3,415	319	343	269
	FY2011	394	802	28,494	27,932	9,978	3,824	764	580	356
	Year-on-year (%)	4.5	32.1	21.5	21.3	35.3	12.0	139.7	69.3	32.3

* "Sales from the relevant business" refer to sales from activities of the relevant business. (ex. For the telecommunications business, sales from activities related to the telecommunications business.)

* The total of the "sales from relevant business" does not match the sum of breakdowns, as some companies provided data in the category of "other."

Fig. 1-1-2 Outline of Companies that Responded to the Survey for the Second Consecutive Year

		Number of companies	Number of establishments	Number of workers (persons)	Number of regular workers (persons)	Sales	Sales from the relevant business	Operating profit (100 million yen)	Ordinary profit (100 million yen)	Number of subsidiaries and affiliated companies owned
						(100 million yen)	(100 million yen)			
Overall	FY2010	4,266	19,797	1,256,824	1,249,949	566,575	380,995	41,399	40,887	7,010
	FY2011	4,266	20,322	1,268,937	1,263,868	577,167	387,200	42,493	36,403	7,048
	Year-on-year (%)	-	2.7	1.0	1.1	1.9	1.6	2.6	-11.0	0.5

2. Sales

- The total sales from the information and communications business were 41.0781 trillion yen.
- Sales related to the relevant business were the largest for the telecommunications business, followed by software and data processing and information services. These three businesses accounted for 77.4% of the total.

Fig. 1-1-3 Sales of the Information and Communications Business

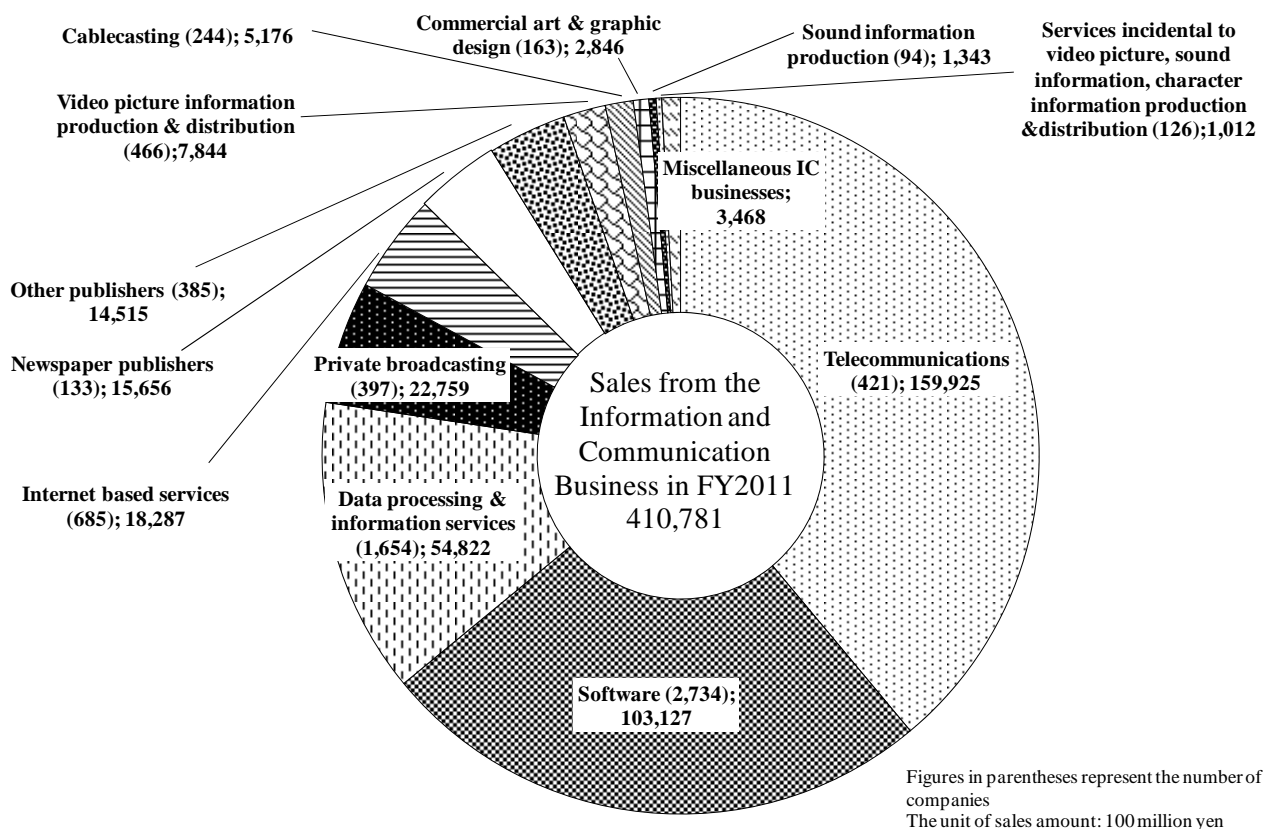


Fig. 1-1-4 Sales of the Information and Communications Business

		Overall	Telecommunications	Software	Data processing & information services	Private broadcasting	Internet based services	Newspaper publishers	Other publishers	Video picture information production & distribution	Cablecasting	Commercial art & graphic design	Sound information production	Services incidental to video picture, sound information, character information production & distribution	Miscellaneous IC businesses
FY2010	Number of companies	5,093	407	2,687	1,554	380	674	115	320	462	229	111	71	104	-
	Sales from the relevant business	413,861	162,576	103,627	56,591	22,787	17,006	16,130	14,671	8,137	4,628	2,332	968	691	3,716
	Composition ratio (%)	100.0	39.3	25.0	13.7	5.5	4.1	3.9	3.5	2.0	1.1	0.6	0.2	0.2	0.9
FY2011	Number of companies	5,371	421	2,734	1,654	397	685	133	385	466	244	163	94	126	-
	Sales from the relevant business	410,781	159,925	103,127	54,822	22,759	18,287	15,656	14,515	7,844	5,176	2,846	1,343	1,012	3,468
	Composition ratio (%)	100.0	38.9	25.1	13.3	5.5	4.5	3.8	3.5	1.9	1.3	0.7	0.3	0.2	0.8
Change from the previous year's composition ratio (points)		-	-0.4	0.1	-0.3	0.0	0.3	-0.1	0.0	-0.1	0.1	0.1	0.1	0.1	-0.1

* "Sales from the relevant business" refer to sales from activities of the relevant business. (ex. For the telecommunications business, sales from activities related to the telecommunications business.)

"Miscellaneous IC businesses" refer to businesses which provided data in the category of "Other" for the main items in the breakdown of sales from the information and communication business.

3. Composition ratios (by capital, sales, number of workers, and engagement in side businesses)

Composition ratios of the number of companies:

- By capital, in eight out of 12 business types, companies with “Less than 100 million yen” accounted for 50% or more of the total.
- By sales, in ten business types except for the private broadcasting business and the sound information production business, companies with sales of “100 million yen to less than 10 billion yen” accounted for 70% or more of the total.
- By the number of workers, in 11 business types except for the newspaper publishers, 50% or more of the companies were those with “Less than 100 workers.”
- By the rate of engagement in side businesses, in all 12 business types, 50% or more of companies also operated other businesses concurrently.

Fig. 1-1-5 Composition Ratios of Companies by Capital

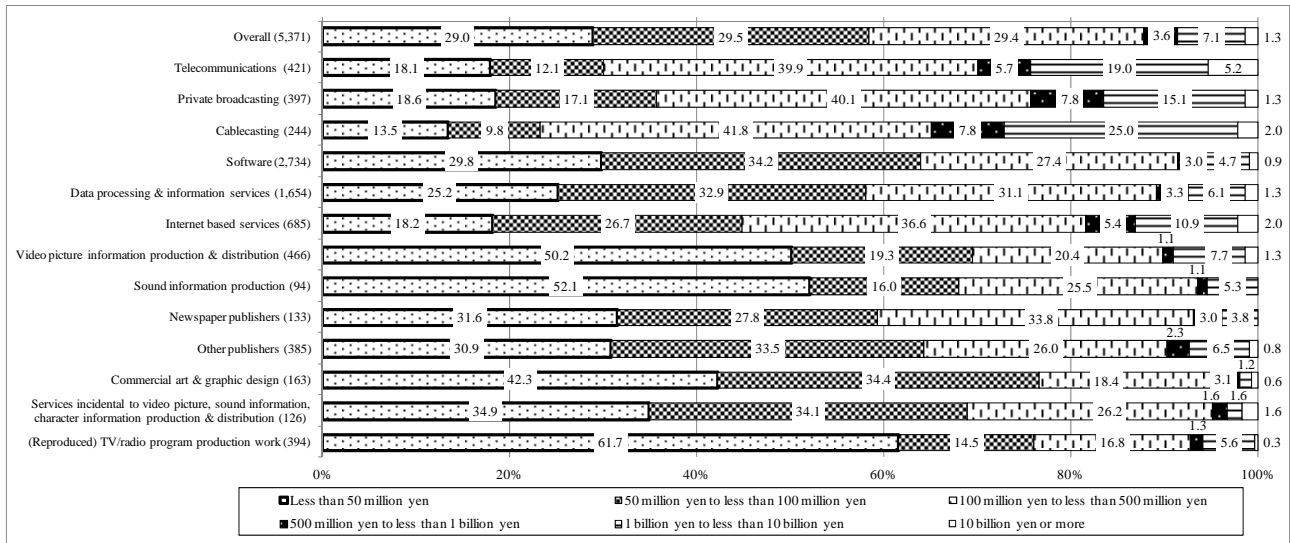


Fig. 1-1-6 Composition Ratios of Companies by Sales

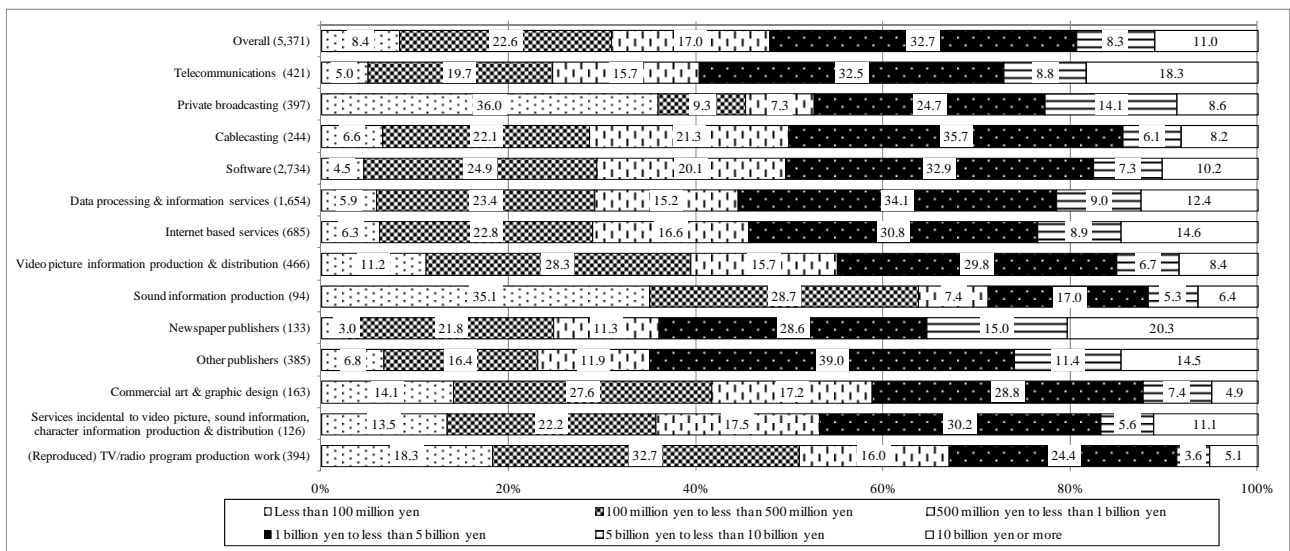


Fig. 1-1-7 Composition Ratios of Companies by Number of Workers

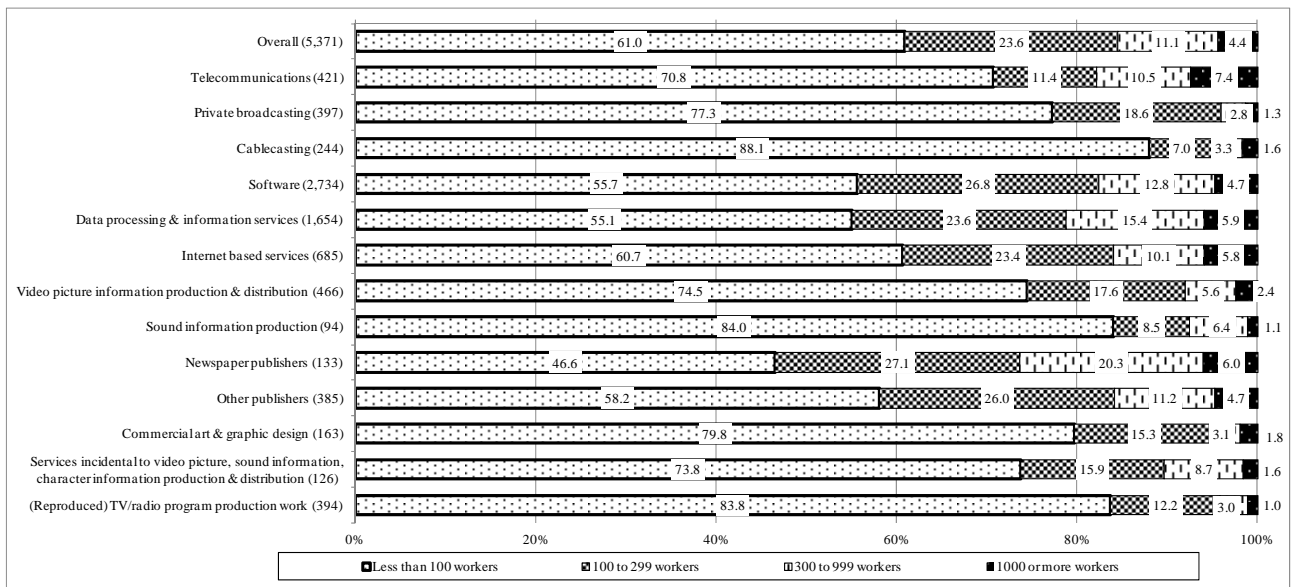
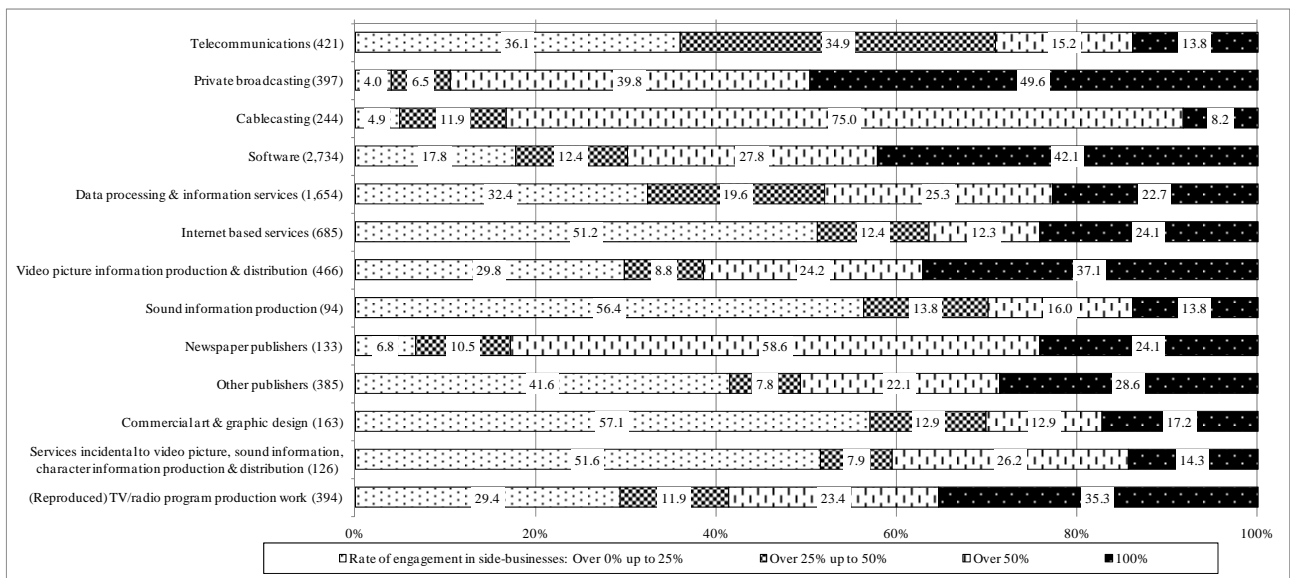


Fig. 1-1-8 Composition Ratios of Companies by Rate of Engagement in Side-Businesses



Note: Rate of engagement in side businesses: Sales from the relevant business/Total sales of the company × 100

4. Assets and added values

- The total amount of assets per company was 14.74 billion yen and the net assets were 6.29 billion yen. The capital adequacy ratio was 42.7%
- The value added per company was 3.85 billion yen, the labor productivity was 14.539 million yen/person, the labor share was 38.4%, and the labor equipment ratio was 21.355 million yen/person.

Fig. 1-1-9 Assets per Company

	Number of companies		Total assets (Total capital) (million yen)			Net assets (Own capital) (million yen)			Turnover of total capital (times)			Capital adequacy ratio (%)		
	FY2010	FY2011	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Vs. previous fiscal year (times)	FY2010	FY2011	Vs. previous fiscal year (points)
Overall	5,093	5,371	15,497.2	14,735.7	-4.9	6,506.4	6,285.2	-3.4	0.80	0.79	-0.02	42.0	42.7	0.7
Telecommunications	407	421	109,859.2	68,785.7	-37.4	40,297.3	37,832.5	-6.1	0.57	0.68	0.11	36.7	55.0	18.3
Private broadcasting	380	397	10,864.1	9,926.7	-8.6	7,232.5	7,248.8	0.2	0.69	0.70	0.02	66.6	73.0	6.5
Cablecasting	229	244	5,580.4	5,201.8	-6.8	2,518.0	2,442.6	-3.0	0.66	0.84	0.18	45.1	47.0	1.8
Software	2,687	2,734	5,799.6	5,790.3	-0.2	2,569.5	2,514.6	-2.1	1.19	1.16	-0.02	44.3	43.4	-0.9
Data processing & information services	1,554	1,654	8,280.6	7,866.8	-5.0	3,610.8	3,574.6	-1.0	1.31	1.24	-0.07	43.6	45.4	1.8
Internet based services	674	685	32,108.8	33,137.0	3.2	7,356.5	6,737.4	-8.4	0.57	0.55	-0.03	22.9	20.3	-2.6
Video picture information production & distribution	462	466	6,642.5	9,430.7	42.0	4,124.7	5,643.3	36.8	0.87	0.94	0.07	62.1	59.8	-2.3
Sound information production	71	94	2,018.8	3,371.3	67.0	929.4	2,086.9	124.5	1.48	1.10	-0.38	46.0	61.9	15.9
Newspaper publishers	115	133	20,876.3	17,788.2	-14.8	9,700.1	8,623.6	-11.1	0.80	0.79	-0.01	46.5	48.5	2.0
Other publishers	320	385	17,278.9	14,090.1	-18.5	9,577.5	8,487.7	-11.4	0.91	0.75	-0.16	55.4	60.2	4.8
Commercial art & graphic design	111	163	10,446.6	8,111.4	-22.4	4,334.9	3,543.7	-18.3	1.42	1.37	-0.05	41.5	43.7	2.2
Services incidental to video picture, sound information, character information production & distribution	104	126	1,818.7	4,243.2	133.3	966.3	2,354.4	143.6	1.23	1.05	-0.18	53.1	55.5	2.4
(Reproduced) TV/radio program production work	377	394	1,757.5	2,402.8	36.7	877.9	1,299.1	48.0	1.11	1.05	-0.06	50.0	54.1	4.1

(Notes) Turnover of total capital = Sales / Total assets (total capital) (Efficiency index to ascertain how many times the amount of sales is as large as the amount of the total capital invested)

Capital adequacy ratio = Net assets (own capital) / Total assets (total capital) × 100 (Index to show the percentage of own capital among the total capital and thereby indicate the financial security)

Fig. 1-1-10 Added Value per Company

	Number of companies		Value added (million yen)			Labor productivity (10,000 yen/person)			Labor share (%)			Labor equipment ratio (10,000 yen/person)		
	FY2010	FY2011	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Vs. previous fiscal year (points)	FY2010	FY2011	Year-on-year (%)
Overall	5,093	5,371	4,331.4	3,849.3	-11.1	1,495.2	1,453.9	-2.8	37.2	38.4	1.2	2,123.0	2,135.5	0.6
Telecommunications	407	421	24,364.9	17,113.4	-29.8	3,881.5	3,528.1	-9.1	16.1	16.9	0.8	9,704.8	7,336.1	-24.4
Private broadcasting	380	397	2,075.4	1,826.9	-12.0	1,851.2	1,939.5	4.8	40.6	40.2	-0.3	3,418.4	3,418.1	0.0
Cablecasting	229	244	1,524.5	2,035.3	33.5	2,347.6	2,287.5	-2.6	20.3	18.7	-1.6	4,836.9	3,402.5	-29.7
Software	2,687	2,734	2,564.0	2,465.7	-3.8	918.7	919.8	0.1	60.3	59.8	-0.5	278.8	276.3	-0.9
Data processing & information services	1,554	1,654	3,262.6	3,022.8	-7.3	895.5	932.7	4.2	55.2	53.3	-1.8	376.1	421.8	12.2
Internet based services	674	685	6,722.8	5,960.3	-11.3	1,792.1	1,790.0	-0.1	30.8	30.0	-0.7	4,185.5	4,614.9	10.3
Video picture information production & distribution	462	466	1,461.0	1,812.1	24.0	1,328.2	1,388.0	4.5	49.0	48.8	-0.2	1,784.6	1,915.9	7.4
Sound information production	71	94	673.8	958.0	42.2	1,145.6	1,097.0	-4.2	52.1	47.7	-4.4	581.4	344.0	-40.8
Newspaper publishers	115	133	5,638.2	4,861.8	-13.8	1,401.1	1,451.8	3.6	56.8	56.2	-0.6	2,277.8	2,316.7	1.7
Other publishers	320	385	3,638.6	3,727.8	2.5	939.0	1,584.1	68.7	51.3	38.9	-12.4	1,105.2	1,543.5	39.7
Commercial art & graphic design	111	163	1,884.2	1,551.7	-17.6	1,475.6	1,205.7	-18.3	52.3	58.5	6.3	1,762.7	1,212.7	-31.2
Services incidental to video picture, sound information, character information production & distribution	104	126	768.6	1,355.5	76.4	819.5	1,077.3	31.5	61.9	49.4	-12.5	492.2	867.3	76.2
(Reproduced) TV/radio program production work	377	394	584.4	733.0	25.4	939.6	1,013.5	7.9	59.5	50.3	-9.1	709.6	781.9	10.2

(Notes) Value added = Operating profit + Depreciation expenses + Total payroll + Welfare expenses + Rental expenses of movables and immovables + Taxes and public imposition

Labor productivity = Value added / Number of workers (Index to ascertain the amount of value added per worker)

Labor share = Total payroll / Value added × 100 (Index to ascertain how much of the generated amount of value added was allocated to personnel expenses)

Labor equipment ratio = Tangible fixed assets / Number of workers (Index to ascertain how much capital (tangible fixed assets) is used per worker)

5. Workers

- The number of workers was 1,422,066, out of which full-time workers/regular staff members (hereinafter referred to as “full-time workers”) were 1,215,094, accounting for 85.4% of the total. The number of part-timers was 112,206 and that of dispatched workers was 121,607.
- The number of workers per company was 265, out of which 226 were full-time workers and 21 were part-timers.

Fig. 1-11 Number of workers

(Unit: companies, persons)

	Number of companies		Number of workers		Number of regular workers		Full-time workers/ Regular staff members		Part-timers		Other regular workers		Dispatched workers	
	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011
	Overall	5,093	5,371	1,475,349	1,422,066	1,467,418	1,414,237	1,264,296	1,215,094	135,544	112,206	67,578	86,937	127,495
Year-on-year (%)	-	5.5	-	-3.6	-	-3.6	-	-3.9	-	-17.2	-	28.6	-	-4.6
Telecommunications	407	421	255,479	204,211	255,216	203,643	212,291	152,369	18,284	15,796	24,641	35,478	26,956	24,256
Private broadcasting	380	397	42,603	37,395	40,090	36,874	31,271	26,349	6,227	5,297	2,592	5,228	5,998	6,173
Cablecasting	229	244	14,871	21,710	14,644	21,497	12,952	15,340	1,061	1,561	631	4,596	2,747	2,548
Software	2,687	2,734	749,889	732,913	748,313	731,534	698,586	681,822	30,730	30,361	18,997	19,351	62,419	64,492
Data processing & information services	1,554	1,654	566,190	536,083	564,688	533,528	464,320	447,141	83,602	64,453	16,766	21,934	58,168	54,807
Internet based services	674	685	252,839	228,095	250,342	226,503	208,813	192,655	25,951	18,413	15,578	15,435	24,752	23,459
Video picture information production & distribution	462	466	50,821	60,839	48,199	60,000	39,378	47,409	5,495	5,265	3,326	7,326	6,253	4,349
Sound information production	71	94	4,176	8,209	4,072	8,152	3,684	6,424	241	443	147	1,285	228	378
Newspaper publishers	115	133	46,278	44,541	45,802	43,778	41,622	39,545	3,012	3,321	1,168	912	2,007	2,066
Other publishers	320	385	124,002	90,603	120,431	89,531	99,477	73,592	16,967	10,915	3,987	5,024	4,128	4,088
Commercial art & graphic design	111	163	14,174	20,978	14,165	20,460	11,792	15,965	471	1,910	1,902	2,585	1,374	905
Services incidental to video picture, sound information, character information production & distribution	104	126	9,754	15,854	9,708	15,659	7,793	13,011	908	1,405	1,007	1,243	601	1,465
(Reproduced) TV/radio program production work	377	394	23,451	28,494	23,028	27,932	19,557	23,385	1,183	1,200	2,288	3,347	1,932	1,796

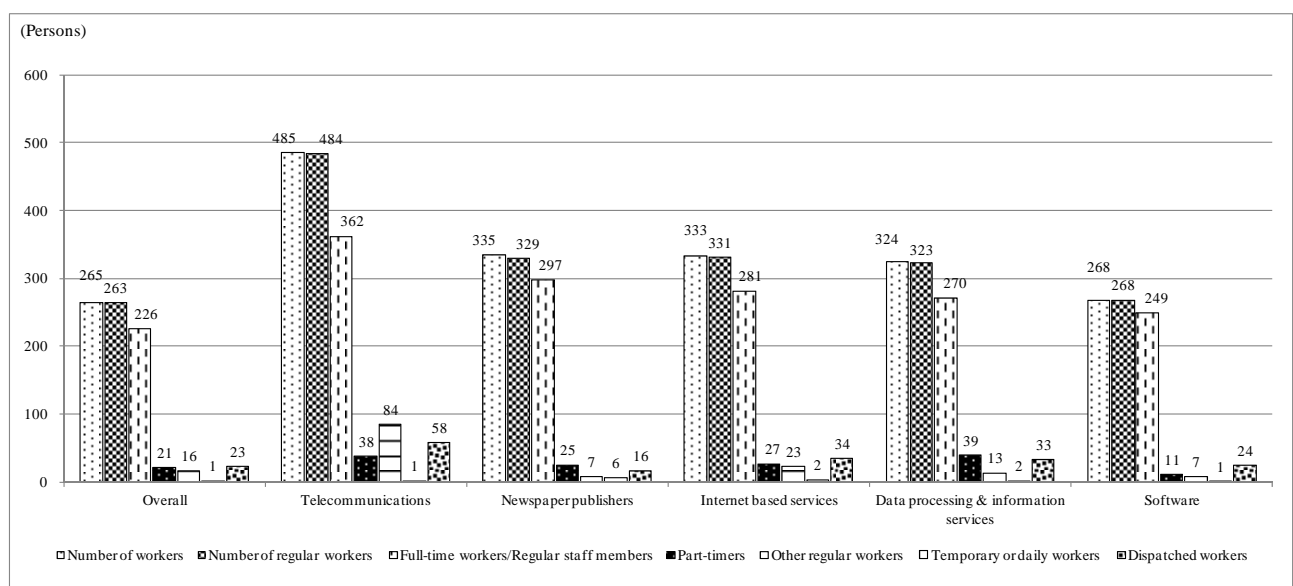
(Note) Other regular workers = Number of regular workers – Full time workers/Regular staff members – Part-timers (meaning paid directors and contract workers, etc.)

Fig. 1-12 Number of Workers for Companies that Responded to the Survey for the Second Consecutive Year

(Unit: companies, persons)

	Number of companies		Number of workers		Number of regular workers		Full-time workers / Regular staff members		Part-timers		Other regular workers		Dispatched workers	
	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011
	Overall	4,266	4,266	1,256,824	1,268,937	1,249,949	1,263,868	1,096,505	1,089,447	98,285	97,421	55,159	77,000	104,678
Year-on-year (%)	-	-	-	1.0	-	1.1	-	-0.6	-	-0.9	-	39.6	-	2.6

Fig. 1-13 Number of Workers per Company for Major Business Types



Section 2 Results Based on Companies Rated as Mainly Engaged in the IC Business

1. Outline of survey results

- The number of companies rated as information and communications companies (IC companies) (meaning companies for which their sales from the information and communications business are rated as being the largest) was 4,643 in FY2011. The number of establishments was 16,310 and the number of regular workers was 1,039,472.
- The total sales by IC companies were 42.2705 trillion yen, and the sales from the information and communications business were 38.7119 trillion yen. The operating profit was 4.1863 trillion yen and the ordinary profit was 3.6861 trillion yen. The number of subsidiaries and affiliated companies owned was 5,729.

Note: Data shown in “Section 2: Results Based on Companies Rated as Mainly Engaged in the IC Business” are those for IC companies.

Fig. 1-2-1 Outline (Based on Companies Rated as Mainly Engaged in the IC Business)

		Number of companies	Number of establishments	Number of workers (persons)	Number of regular workers (persons)	Sales		Operating profit (100 million yen)	Ordinary profit (100 million yen)	Number of subsidiaries and affiliated companies owned
						(100 million yen)	Sales from the IC business (100 million yen)			
Total	FY2010	5,093	23,049	1,475,349	1,467,418	634,320	413,861	44,630	44,075	8,160
	FY2011	5,371	23,604	1,422,066	1,414,237	624,060	410,781	45,308	39,531	8,264
	Year-on-year (%)	5.5	2.4	-3.6	-3.6	-1.6	-0.7	1.5	-10.3	1.3
IC companies	FY2010	4,398	16,151	1,064,269	1,057,905	422,755	387,607	34,481	34,861	5,574
	FY2011	4,643	16,310	1,043,652	1,039,472	422,705	387,119	41,863	36,861	5,729
	Year-on-year (%)	5.6	1.0	-1.9	-1.7	0.0	-0.1	21.4	5.7	2.8
Telecommunications	FY2010	128	849	119,279	119,088	165,118	156,621	19,498	19,373	399
	FY2011	131	767	110,483	109,975	165,446	157,176	20,958	21,237	318
	Year-on-year (%)	2.3	-9.7	-7.4	-7.7	0.2	0.4	7.5	9.6	-20.3
Private broadcasting	FY2010	345	1,111	34,428	31,960	25,778	24,892	1,529	1,628	518
	FY2011	369	1,050	28,978	28,505	25,391	24,547	1,670	1,777	474
	Year-on-year (%)	7.0	-5.5	-15.8	-10.8	-1.5	-1.4	9.2	9.2	-8.5
Cablecasting	FY2010	203	328	11,622	11,587	6,679	6,646	748	707	73
	FY2011	218	535	17,547	17,490	8,581	7,755	1,106	772	59
	Year-on-year (%)	7.4	63.1	51.0	50.9	28.5	16.7	47.9	9.2	-19.2
Software	FY2010	1,972	5,646	485,679	485,047	106,695	92,339	5,600	5,657	1,825
	FY2011	2,012	5,653	477,042	476,485	107,474	92,548	5,787	5,810	2,047
	Year-on-year (%)	2.0	0.1	-1.8	-1.8	0.7	0.2	3.3	2.7	12.2
Data processing & information services	FY2010	839	4,111	267,534	266,830	62,161	55,027	3,533	3,637	974
	FY2011	885	3,942	267,690	266,898	58,358	51,860	4,341	3,704	997
	Year-on-year (%)	5.5	-4.1	0.1	0.0	-6.1	-5.8	22.9	1.8	2.4
Internet based services	FY2010	245	558	36,897	36,821	11,995	11,153	1,558	1,536	364
	FY2011	262	610	36,336	36,213	12,404	11,741	2,658	1,640	415
	Year-on-year (%)	6.9	9.3	-1.5	-1.7	3.4	5.3	70.6	6.8	14.0
Video picture information production & distribution	FY2010	312	521	23,231	22,873	8,150	7,140	421	527	397
	FY2011	303	515	21,265	20,610	7,596	6,599	458	526	370
	Year-on-year (%)	-2.9	-1.2	-8.5	-9.9	-6.8	-7.6	8.8	-0.2	-6.8
TV program production	FY2010	239	354	14,748	14,470	3,841	3,563	126	176	187
	FY2011	232	358	14,458	14,086	4,365	3,987	231	256	245
	Year-on-year (%)	-2.9	1.1	-2.0	-2.7	13.6	11.9	83.3	45.5	31.0
Sound information production	FY2010	28	43	1,453	1,444	1,263	1,162	104	109	11
	FY2011	30	55	1,678	1,647	1,969	1,803	163	162	19
	Year-on-year (%)	7.1	27.9	15.5	14.1	55.9	55.2	56.7	48.6	72.7
Radio program production	FY2010	21	25	476	467	66	65	1	2	2
	FY2011	19	27	406	376	57	57	4	3	-
	Year-on-year (%)	-9.5	8.0	-14.7	-19.5	-13.6	-12.3	300.0	50.0	-
Newspaper publishers	FY2010	95	2,023	42,921	42,454	18,177	16,547	447	542	630
	FY2011	116	2,047	42,257	41,500	18,043	16,246	557	648	615
	Year-on-year (%)	22.1	1.2	-1.5	-2.2	-0.7	-1.8	24.6	19.6	-2.4
Other publishers	FY2010	153	708	35,560	34,144	15,576	15,040	1,002	1,147	343
	FY2011	204	812	32,459	32,306	15,642	15,278	4,109	522	360
	Year-on-year (%)	33.3	14.7	-8.7	-5.4	0.4	1.6	310.1	-54.5	5.0
Commercial art & graphic design	FY2010	35	72	1,777	1,777	467	436	60	10	11
	FY2011	57	125	2,820	2,787	729	706	33	35	26
	Year-on-year (%)	62.9	73.6	58.7	56.8	56.1	61.9	-45.0	250.0	136.4
Services incidental to video picture, sound information, character information production & distribution	FY2010	43	181	3,888	3,880	696	604	-18	-13	29
	FY2011	56	199	5,097	5,056	1,073	859	22	28	29
	Year-on-year (%)	30.2	9.9	31.1	30.3	54.2	42.2	-	-	0.0
Other (Other than IC companies)	FY2010	695	6,898	411,080	409,513	211,565	26,254	10,149	9,215	2,586
	FY2011	728	7,294	378,414	374,765	201,355	23,662	3,445	2,670	2,535
	Year-on-year (%)	4.7	5.7	-7.9	-8.5	-4.8	-9.9	-66.1	-71.0	-2.0

- The number of establishments per IC company was 3.5 (down 0.2 establishments), and the number of regular workers was 224 (down 7.1%).
- Sales per IC company were 9.10 billion yen (down 5.3%), and sales from the information and communications business were 8.34 billion yen (down 5.4%). The operating profit was 902 million yen (up 15.0%) and the ordinary profit was 794 million yen (up 0.2%). The number of subsidiaries and affiliated companies owned was 4.3 (up 0.1 companies).

Fig. 1-2-2 Outline (Per Company)

		Number of establishments	Number of workers (persons)	Number of regular workers (persons)	Sales		Operating profit (million yen)	Ordinary profit (million yen)	Number of subsidiaries and affiliated companies owned
					(million yen)	Sales from the IC business (million yen)			
Total	FY2010	4.5	290	288	12,454.7	8,126.1	876.3	865.4	5.0
	FY2011	4.4	265	263	11,619.1	7,648.1	843.6	736.0	5.2
	Year-on-year (%)	-0.1	-8.6	-8.7	-6.7	-5.9	-3.7	-15.0	0.2
IC company	FY2010	3.7	242	241	9,612.4	8,813.3	784.0	792.6	4.2
	FY2011	3.5	225	224	9,104.1	8,337.7	901.6	793.9	4.3
	Year-on-year (%)	-0.2	-7.0	-7.1	-5.3	-5.4	15.0	0.2	0.1
Telecommunications	FY2010	6.6	932	930	128,998.7	122,359.8	15,233.0	15,135.4	11.4
	FY2011	5.9	843	840	126,295.0	119,981.9	15,998.5	16,211.1	10.3
	Year-on-year (%)	-0.7	-9.5	-9.7	-2.1	-1.9	5.0	7.1	-1.1
Private broadcasting	FY2010	3.2	100	93	7,472.0	7,215.1	443.2	472.0	3.8
	FY2011	2.8	79	77	6,880.9	6,652.3	452.7	481.7	3.8
	Year-on-year (%)	-0.4	-21.0	-17.2	-7.9	-7.8	2.1	2.1	0.0
Cablecasting	FY2010	1.6	57	57	3,290.1	3,273.9	368.4	348.3	2.6
	FY2011	2.5	80	80	3,936.0	3,557.5	507.5	354.1	2.2
	Year-on-year (%)	0.9	40.4	40.4	19.6	8.7	37.8	1.7	-0.4
Software	FY2010	2.9	246	246	5,410.5	4,682.5	284.0	286.9	3.1
	FY2011	2.8	237	237	5,341.7	4,599.8	287.6	288.8	3.5
	Year-on-year (%)	-0.1	-3.7	-3.7	-1.3	-1.8	1.3	0.7	0.4
Data processing & information services	FY2010	4.9	319	318	7,409.0	6,558.6	421.1	433.5	4.6
	FY2011	4.5	302	302	6,594.2	5,859.9	490.5	418.6	4.4
	Year-on-year (%)	-0.4	-5.3	-5.0	-11.0	-10.7	16.5	-3.4	-0.2
Internet based services	FY2010	2.3	151	150	4,895.8	4,552.4	635.7	626.9	3.8
	FY2011	2.3	139	138	4,734.4	4,481.2	1,014.3	626.1	4.4
	Year-on-year (%)	0.0	-7.9	-8.0	-3.3	-1.6	59.6	-0.1	0.6
Video picture information production & distribution	FY2010	1.7	74	73	2,612.1	2,288.5	134.8	168.9	5.3
	FY2011	1.7	70	68	2,506.9	2,177.9	151.3	173.4	6.3
	Year-on-year (%)	0.0	-5.4	-6.8	-4.0	-4.8	12.2	2.7	1.0
TV program production	FY2010	1.5	62	61	1,607.0	1,490.7	52.5	73.6	3.5
	FY2011	1.5	62	61	1,881.4	1,718.3	99.4	110.5	5.6
	Year-on-year (%)	0.0	0.0	0.0	17.1	15.3	89.3	50.1	2.1
Sound information production	FY2010	1.5	52	52	4,510.6	4,151.3	370.4	388.4	1.8
	FY2011	1.8	56	55	6,562.5	6,008.5	543.8	540.7	2.4
	Year-on-year (%)	0.3	7.7	5.8	45.5	44.7	46.8	39.2	0.6
Radio program production	FY2010	1.2	23	22	312.3	308.3	6.4	7.5	1.0
	FY2011	1.4	21	20	300.6	299.5	19.1	14.0	-
	Year-on-year (%)	0.2	-8.7	-9.1	-3.7	-2.9	198.4	86.7	-
Newspaper publishers	FY2010	21.3	452	447	19,133.6	17,417.6	470.7	571.0	10.3
	FY2011	17.6	364	358	15,554.1	14,005.3	479.8	558.3	9.3
	Year-on-year (%)	-3.7	-19.5	-19.9	-18.7	-19.6	1.9	-2.2	-1.0
Other publishers	FY2010	4.6	232	223	10,180.2	9,830.2	655.0	749.7	4.4
	FY2011	4.0	159	158	7,667.5	7,489.3	2,014.4	256.1	4.6
	Year-on-year (%)	-0.6	-31.5	-29.1	-24.7	-23.8	207.5	-65.8	0.2
Commercial art & graphic design	FY2010	2.1	51	51	1,334.8	1,245.6	172.7	29.1	1.6
	FY2011	2.2	49	49	1,278.9	1,239.1	58.4	60.6	1.7
	Year-on-year (%)	0.1	-3.9	-3.9	-4.2	-0.5	-66.2	108.2	0.1
Services incidental to video picture, sound information, character information	FY2010	4.2	90	90	1,617.6	1,404.1	-42.5	-31.2	2.2
	FY2011	3.6	91	90	1,915.6	1,534.3	39.4	50.5	2.6
	Year-on-year (%)	-0.6	1.1	0.0	18.4	9.3	-	-	0.4
Other (Other than IC company)	FY2010	9.9	591	589	30,441.1	3,777.6	1,460.2	1,325.9	9.2
	FY2011	10.0	520	515	27,658.7	3,250.3	473.2	366.7	9.1
	Year-on-year (%)	0.1	-12.0	-12.6	-9.1	-14.0	-67.6	-72.3	-0.1

(Note 1) The number of subsidiaries and affiliated companies owned per company represents the value obtained upon dividing the total number of subsidiaries and affiliates by the number of subsidiaries and affiliates owned.

(Note 2) The year-on-year comparison for the number of establishments and the number of subsidiaries and affiliated companies owned per company represents the difference as compared to the previous fiscal year.

2. Number of companies

- Looking at the number of IC companies in terms of the composition ratio by capital, companies with “Less than 100 million yen” accounted for 58.8% (up 2.4 points).
- By sales, companies with “Less than 1 billion yen” accounted for 50.8% (up 2.2 points).
- By number of regular workers, companies with “Less than 100 workers” accounted for 63.9% (up 3.5 points).

Fig. 1-2-3 Composition Ratios of IC Companies by Capital

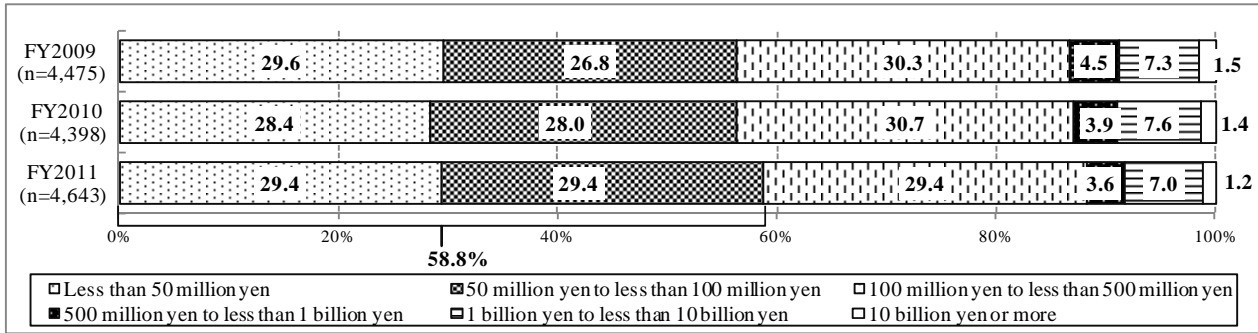


Fig. 1-2-4 Composition Ratios of IC Companies by Sales

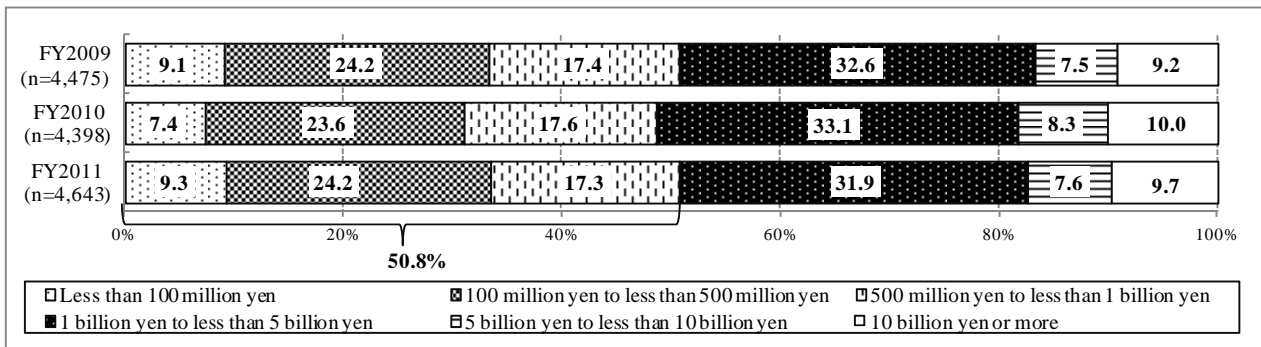
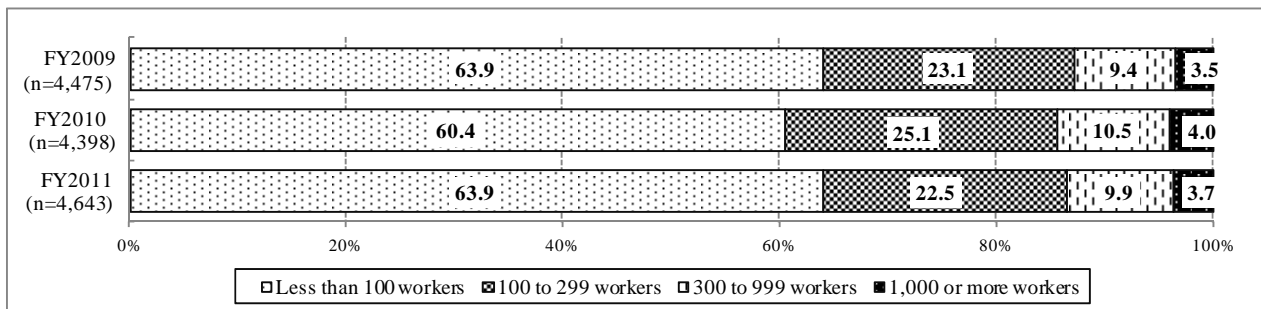


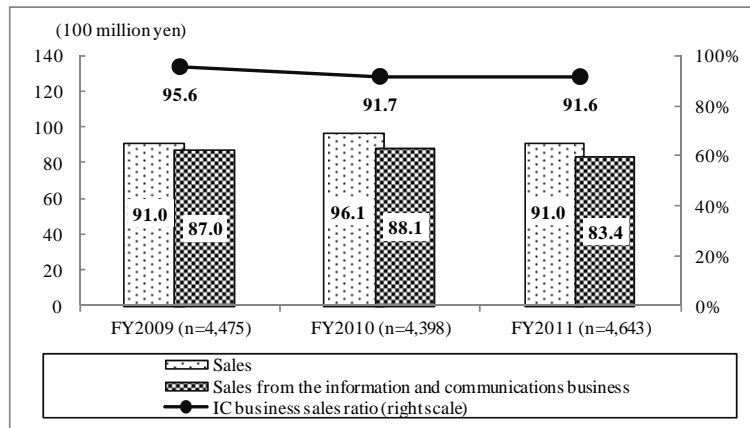
Fig. 1-2-5 Composition Ratios of IC Companies by Number of Regular Workers



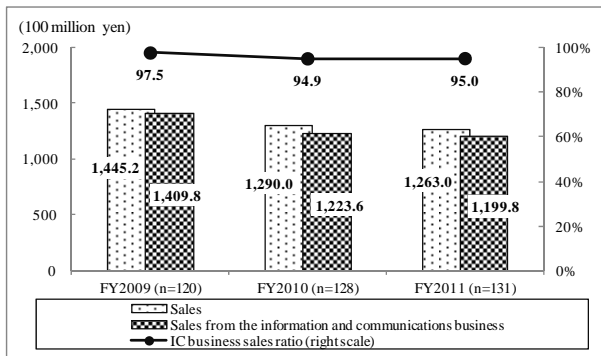
3. Sales and profits

- The sales per IC company were 9.10 billion yen (down 5.3%). The sales from the information and communications business were 8.34 billion yen (down 5.4%), making up 91.6% of sales (down 0.1 points).
- The operating profit per IC company was 900 million yen (up 15.0%), and ordinary profit per IC company was 790 million yen (up 0.2%). Current net income per IC company was 440 million yen (down 1.0%).
- The operating margin was 9.9% (up 1.7 points), the operating profit on sales was 8.7% (up 0.5 points), and the income margin was 4.8% (up 0.2 points).

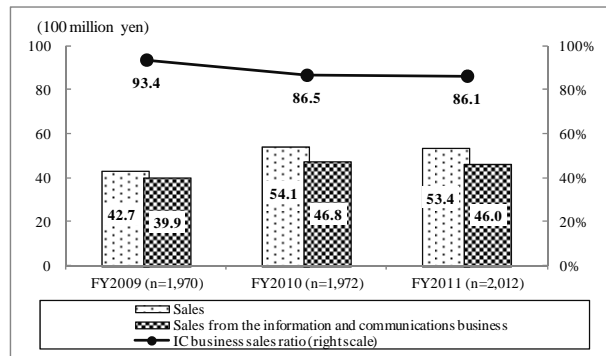
Fig. 1-2-6 Sales per Company for Major Business Types
[IC company]



[Telecommunications companies]



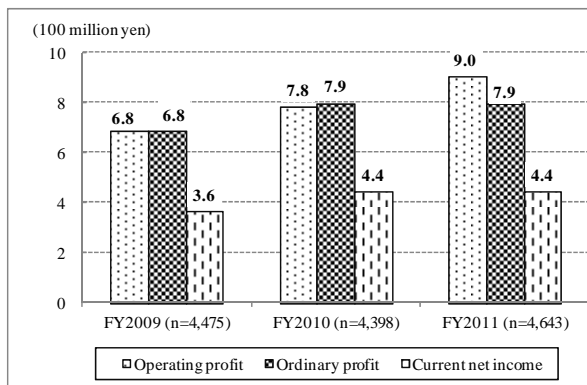
[Software companies]



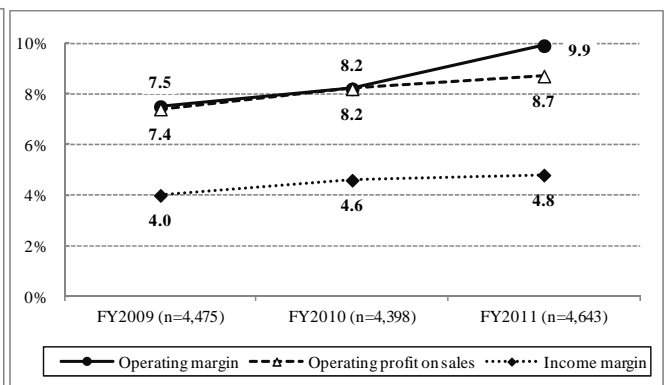
(Note) IC business sales ratio = IC business sales ÷ sales × 100. Calculated in 1 million yen units.

Fig. 1-2-7 Profits of IC companies

[Profits per Company]



[Profit Margin]

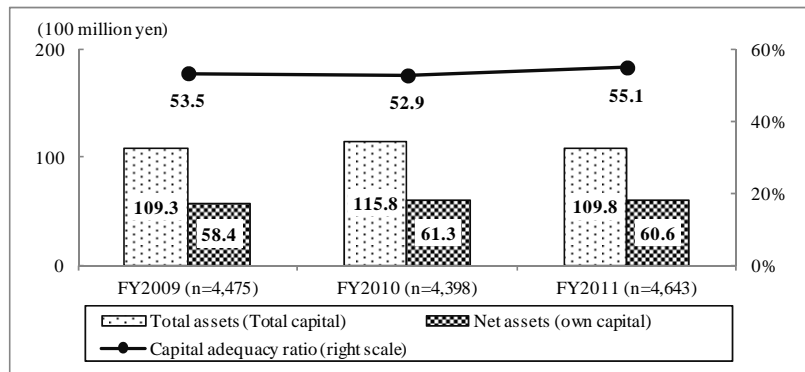


(Notes) Operating margin = Operating profit / Sales × 100 (Profitability index to ascertain how much profit was obtained from operation activities related to the main business from among total sales)
 Operating profit on sales = Ordinary profit / Sales × 100 (Profitability index to ascertain how much profit was obtained from ordinary activities (operations and financial transactions) from among sales)
 Income margin = Current net income / Sales × 100 (Profitability index to ascertain how much profit was ultimately obtained by the company)
 The operating margin, operating profit on sales, and income margin are calculated in 1 million yen units.

4. Assets and added value

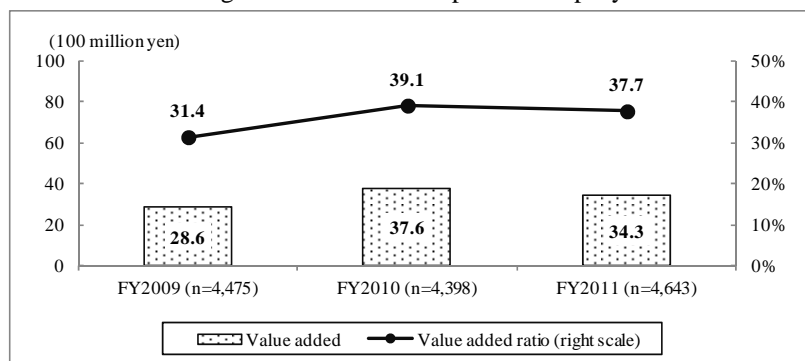
- The total amount of assets per IC company was 10.98 billion yen (down 5.2%) and net assets were 6.06 billion yen (down 1.1%). The capital adequacy ratio was 55.1% (up 2.2 points).
- The added value per IC company was 3.43 billion yen (down 8.8%). The value added ratio was 37.7% (down 1.4 points) and labor productivity was 15.320 million yen/person (down 2.0%). The labor equipment ratio was 16.975 million yen/person (up 1.9%).

Fig. 1-2-8 Assets per IC Company



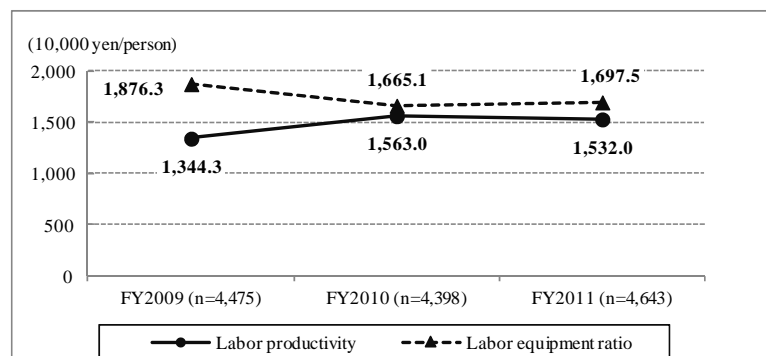
(Note) Capital adequacy ratio = Net assets (own capital) / Total assets (total capital) × 100. Index to show the percentage of own capital among the total capital and thereby indicate the financial security.
Calculated in 1 million yen units.

Fig. 1-2-9 Added Value per IC Company



(Notes) Value added = Operating profit + Depreciation expenses + Total payroll + Welfare expenses + Rental expenses of movables and immovables + Taxes and public imposition
Value added ratio = Value added / Sales × 100. Productivity index to ascertain the value newly produced by companies.

Fig.1-2-10 Labor Productivity and Labour Equipment Ratio of IC Companies



(Notes) Labor productivity = Value added / Number of regular workers. Index to ascertain the amount of value added per worker.
Labor equipment ratio = Tangible fixed assets / Number of regular workers. Index to ascertain how much capital (tangible fixed assets) is used per worker.

5. Workers

- The total number of regular workers at IC companies was 1,039,472, out of which 904,576 were full-time workers. The number of part-timers was 70,262 and the number of dispatched workers was 103,569.
- The number of regular workers per IC company was 224 (down 7.1%). The number of full-time workers was 195 (down 8.9%). The number of part-timers was 15 (down 6.3%) and the number of dispatched workers was 22 (down 12.0%).
- Looking at the composition ratio of regular workers, full-time workers represented 87.0% (down 1.9 points), and the ratio was on a yearly downward trend. Part-timers represented 6.8% (up 0.1 points).

Fig. 1-2-11 Workers at IC Companies

	Number of workers (persons)			Composition ratio of regular workers (%)			Number of Workers per IC Company (persons)		
	FY2010 (n=4,398)	FY2011 (n=4,643)	Year-on-year (%)	FY2010	FY2011	Vs. previous fiscal year (points)	FY2010	FY2011	Year-on-year (%)
Workers	1,064,269	1,043,652	-1.9	-	-	-	242	225	-7.0
Regular workers	1,057,905	1,039,472	-1.7	100.0	100.0	-	241	224	-7.1
Full-time workers/ Regular staff members	940,517	904,576	-3.8	88.9	87.0	-1.9	214	195	-8.9
Part-timers	71,071	70,262	-1.1	6.7	6.8	0.1	16	15	-6.3
Other regular workers	46,317	64,634	39.5	4.4	6.2	1.8	11	14	27.3
Temporary or daily workers	6,364	4,180	-34.3	-	-	-	1	1	0.0
Dispatched workers	108,544	103,569	-4.6	-	-	-	25	22	-12.0

(Note) Other regular workers = Regular workers - Full-time workers/Regular staff members - Part-timers (meaning paid directors and contract workers, etc.).

Fig. 1-2-12 Number of Workers per IC Company

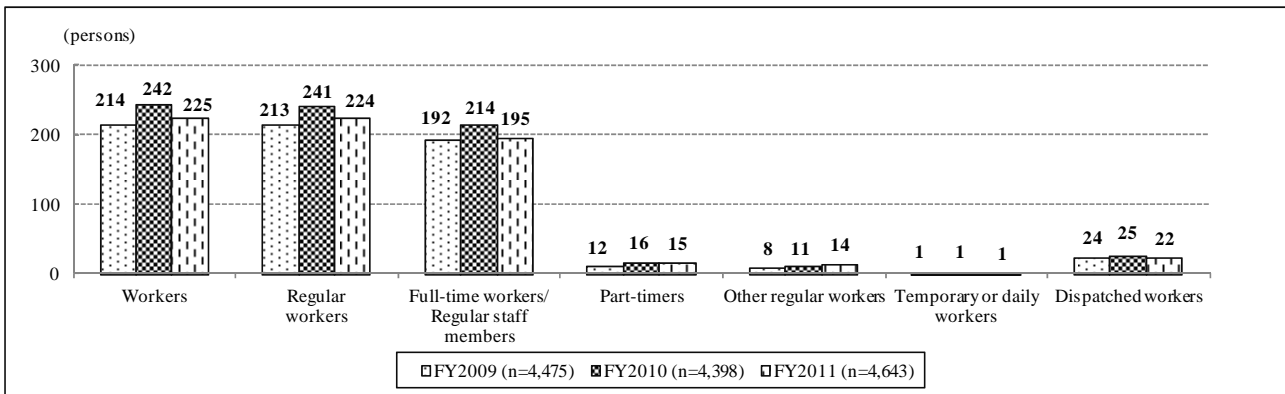
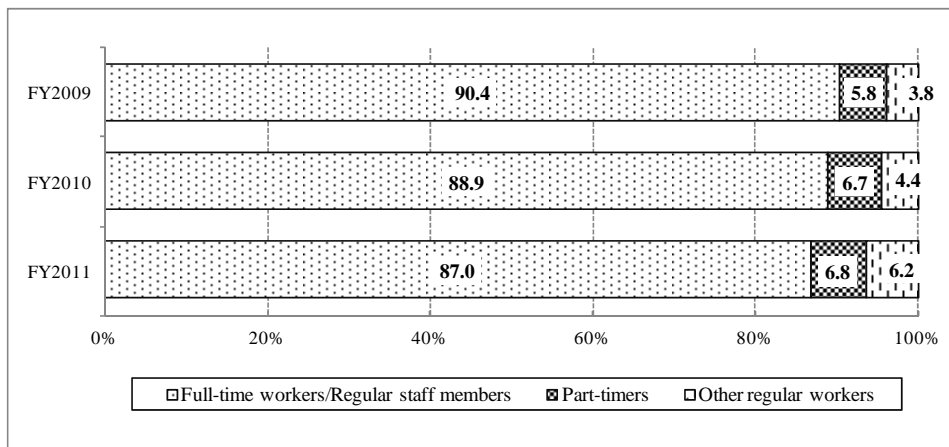


Fig. 1-2-13 Composition Ratios of Regular Workers at IC Companies



6. Subsidiaries and affiliated companies

- The ratio of IC companies that own subsidiaries^(Note) was 28.4% (down 2.1 points). The ratio of IC companies which own domestic subsidiaries was 24.9% (down 2.2 points), and the ratio of IC companies which own overseas subsidiaries was 8.0% (down 0.1 points).
- The number of subsidiaries was 5,729. Of which, the number of domestic subsidiaries was 4,401 and the number of overseas subsidiaries was 1,328.
- The number of subsidiaries owned per IC company was 4.3 (up 0.1 companies). The number of domestic subsidiaries owned was 3.8 (up 0.2 companies) and the number of overseas subsidiaries owned was 3.6 (up 0.1 companies).
- Looking at overseas subsidiaries by region, Asia accounted for 801 companies (up 93 companies), or 60.5% in terms of the composition ratio (up 3.0 points). Of which, China accounted for 445 companies (up 44 companies), or 33.6% in terms of the composition ratio (up 1.0 points).

(Note) Subsidiaries include affiliated companies.

Fig. 1-2-14 Ownership of Subsidiaries by IC Companies

	Number of companies owning subsidiaries		Ratio of companies owning subsidiaries			Number of subsidiaries		Number of subsidiaries owned per IC company		
	FY2010 (n=4,398)	FY2011 (n=4,643)	FY2010	FY2011	Vs. previous fiscal year (points)	FY2010	FY2011	FY2010	FY2011	Vs. previous fiscal year (companies)
IC companies	1,343	1,319	30.5	28.4	-2.1	5,574	5,729	4.2	4.3	0.1
Owning domestic subsidiaries	1,191	1,154	27.1	24.9	-2.2	4,343	4,401	3.6	3.8	0.2
Owning overseas subsidiaries	356	373	8.1	8.0	-0.1	1,231	1,328	3.5	3.6	0.1

(Note) Number of subsidiaries owned per IC company = Number of subsidiaries / Number of companies owning subsidiaries

Number of domestic subsidiaries owned per IC company = Number of domestic subsidiaries / Number of companies owning domestic subsidiaries

Number of overseas subsidiaries owned per IC company = Number of overseas subsidiaries / Number of companies owning overseas subsidiaries

[Ratio of companies owning subsidiaries]

[Number of subsidiaries owned per IC company]

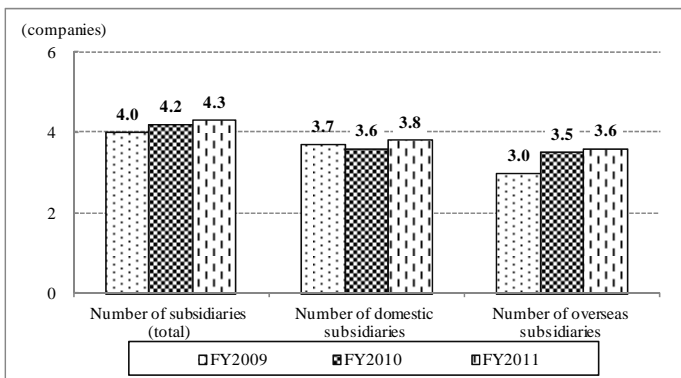
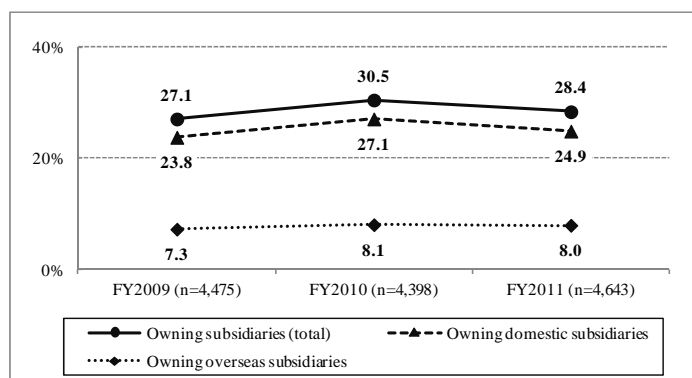
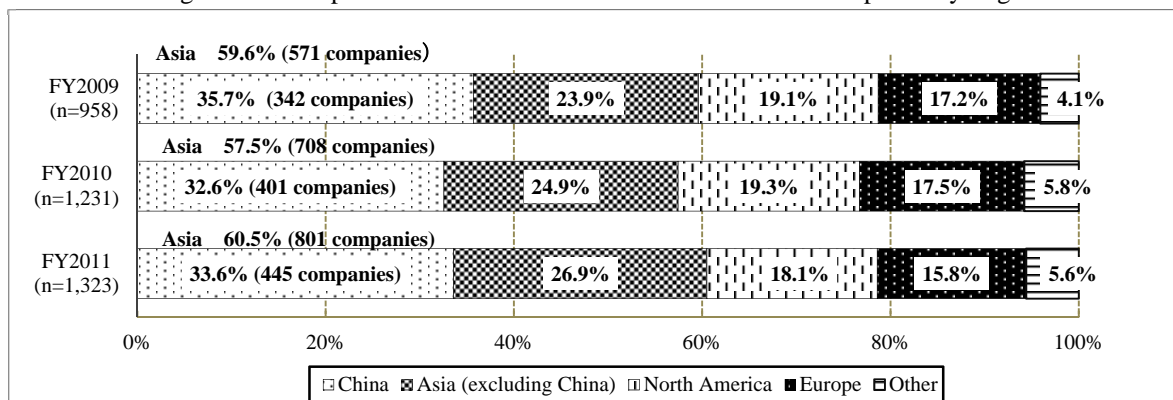


Fig. 1-2-15 Composition Ratios of Overseas Subsidiaries of IC Companies by Region



(Note) Tabulated based on the number of subsidiaries from which there were responses regarding overseas regions.

Chapter 2 Telecommunications and Broadcasting Business

This Chapter shows the results of the Survey on Items for Each Business Type (Telecommunications and Broadcasting) based on valid responses from 739 companies (960 companies on a business basis).

1. Composition of business operators (by capital, sales, and number of workers)

- By capital, business operators with capital of “300 million yen to less than 500 million yen” were the largest in number, accounting for 20.6%, followed by those with capital of “100 million yen to less than 300 million yen,” accounting for 19.9%, and those with capital of “1 billion yen to less than 5 billion yen,” accounting for 16.8%. By business type, business operators with capital of “300 million yen to less than 500 million yen” accounted for the majority in telecommunications and cable television broadcasting, and those with capital of “100 million yen to less than 300 million yen” accounted for the majority in private broadcasting.
- By sales, business operators with sales of “100 million yen to less than 1 billion yen” and “1 billion yen to less than 10 billion yen” accounted for approximately 30% each (35.3% and 29.9%, respectively). By business type, business operators with sales of “100 million yen to less than 1 billion yen” accounted for the majority in telecommunications and cable television broadcasting (42.9% and 54.0%, respectively), and those with sales of “less than 100 million yen” accounted for the majority in private broadcasting (40.5%).
- By the number of workers, business operators with “One to 29 workers” accounted for the majority, or 63.4%, followed by those with “30 to 99 workers,” accounting for 21.0%. The same trend is also evident when looking by business type.

Fig. 2-1 Composition of Telecommunications and Broadcasting Companies by Capital (Business Basis)

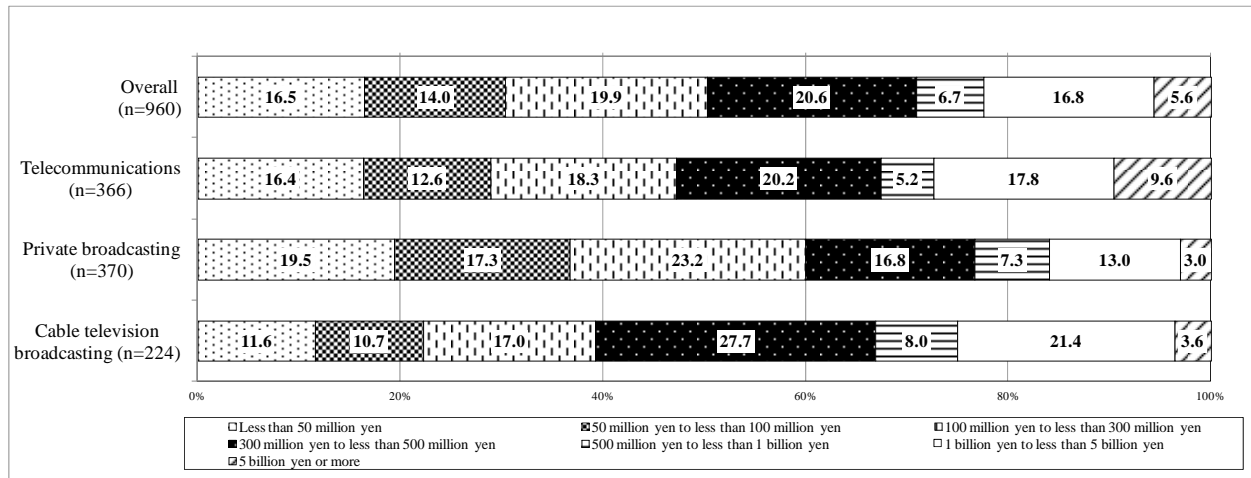


Fig. 2-2 Composition of Telecommunications and Broadcasting Companies by Sales (Business Basis)

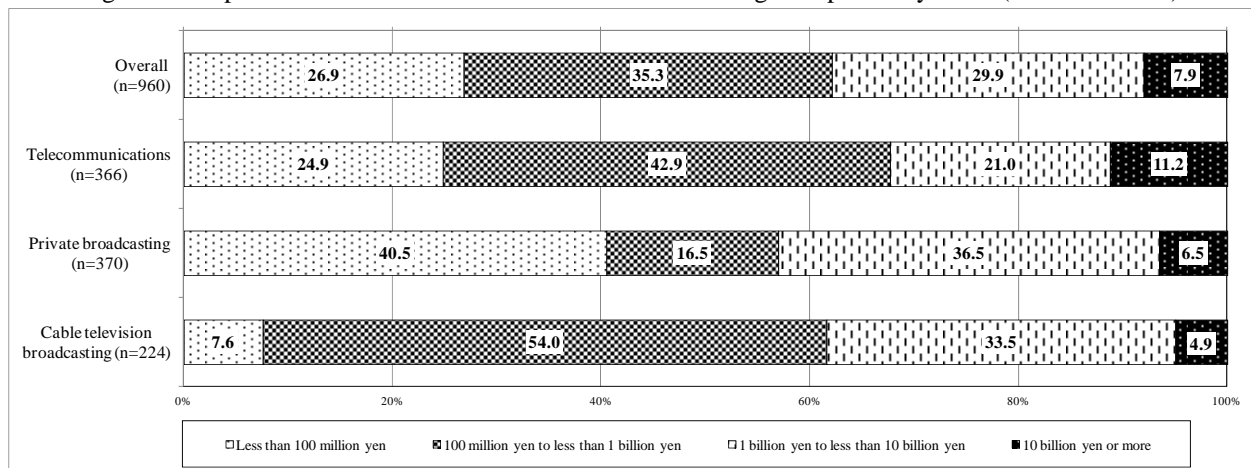
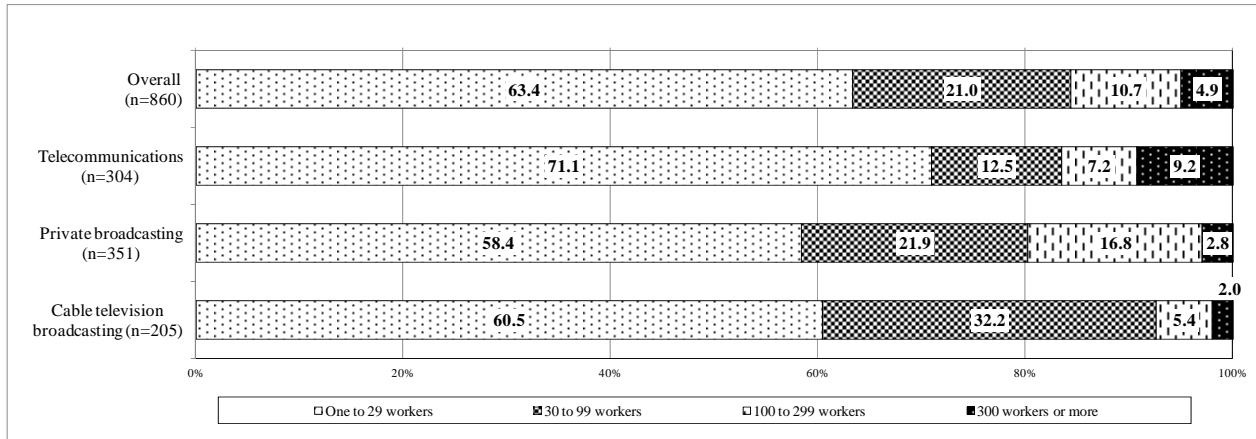


Fig. 2-3 Composition of Telecommunications and Broadcasting Companies by Number of Workers (Business Basis)



2. Sales

(1) Changes in sales in the telecommunications and broadcasting business

- The total sales of the telecommunications and broadcasting business in FY2011 (on a business basis) were 16.3025 trillion yen.
- The total sales of companies that responded to the survey for the second consecutive year were 15.5829 trillion yen (down 0.5%).
- Looking at the engagement in side-businesses, there are many companies that engaged in the telecommunications business and the cable television broadcasting business concurrently.

Fig. 2-4 Changes in Sales by Business Type

(Unit: companies, 100 million yen, %)

Classification	FY2009		FY2010		FY2011	
	Number of companies	Sales (Composition ratio)	Number of companies	Sales (Composition ratio)	Number of companies	Sales (Composition ratio)
Overall	1,077	178,215 (100.0%)	980	167,525 (100.0%)	961	163,025 (100.0%)
Telecommunications	403	142,182 (79.8%)	380	133,682 (79.8%)	366	132,555 (81.3%)
Broadcasting	674	36,033 (20.2%)	600	33,842 (20.2%)	595	30,470 (18.7%)
Private broadcasting	436	25,406 (14.3%)	380	22,835 (13.6%)	370	19,025 (11.7%)
Cable television broadcasting	237	3,928 (2.2%)	219	4,168 (2.5%)	224	4,447 (2.7%)
NHK	1	6,699 (3.8%)	1	6,840 (4.1%)	1	6,997 (4.3%)

*Data for NHK are based on publicized materials

Fig. 2-5 Sales by Business Type of Companies that Responded to the Survey for the Second Consecutive Year

(Unit: companies, 100 million yen, %)

Classification	FY2010		FY2011		Year-on-year (%)
	Number of companies	Sales (Composition ratio)	Number of companies	Sales (Composition ratio)	
Overall	737	156,610 (100.0%)	737	155,829 (100.0%)	-0.5
Telecommunications	267	129,149 (82.5%)	267	127,911 (82.1%)	-1.0
Broadcasting	470	27,460 (17.5%)	470	27,918 (17.9%)	1.7
Private broadcasting	294	17,350 (11.1%)	294	17,485 (11.2%)	0.8
Cable television broadcasting	175	3,270 (2.1%)	175	3,437 (2.2%)	5.1
NHK	1	6,840 (4.4%)	1	6,997 (4.5%)	2.3

*Data for NHK are based on publicized materials

Fig. 2-6 Engagement in Side-Businesses

(Unit: companies, 100 million yen, %)

	Telecommunications		Private broadcasting		Cable television broadcasting	
	Number of companies	Sales	Number of companies	Sales	Number of companies	Sales
(Relevant business)						
Telecommunications	366	132,555				
Private broadcasting			370	19,025		
Cable television broadcasting					224	4,447
(Other businesses)						
Telecommunications	17	3,187				
Private broadcasting			17	669		
Cable television broadcasting					17	158

* "Other businesses" refer to business types other than the relevant one in the telecommunications and broadcasting industry.

(2) Breakdown of sales

- Looking at the breakdown of sales in the telecommunications business in FY2011 by sound or data transmission, sales from data transmission used for such purposes as an Internet connection continued to increase, accounting for 44.3% (up 2.2 points). Looking at fixed/mobile communications, fixed communications accounted for 46.4% (up 7.1 points).
- With regard to the breakdown of sales for FY2011 in the private broadcasting business, 72.0% of the total sales were from terrestrial television broadcasting services (down 1.6 points) and 7.1% were from terrestrial radio broadcasting services (up 1.7 points).
- Of the total sales of the cable television broadcasting business in FY2011, 77.4% were from basic services (down 2.8 points), and 8.1% from pay services (up 2.7 points).

Fig. 2-7 Changes in the Breakdown of Sales of the Telecommunications Business (By Sound or Data Transmission)

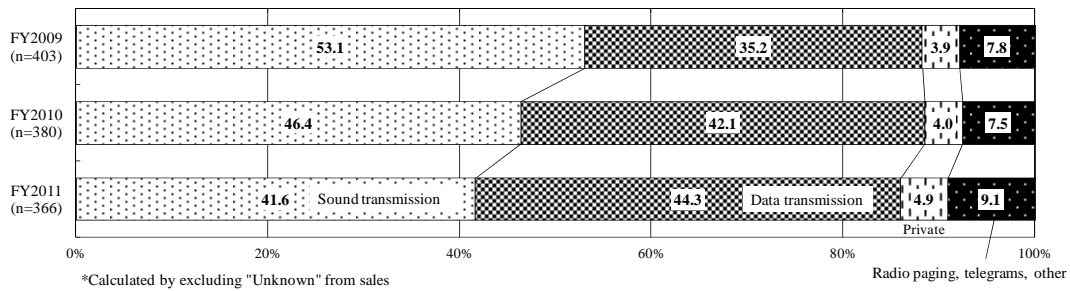


Fig. 2-8 Changes in the Breakdown of Sales of the Telecommunications Business (By Fixed/Mobile)

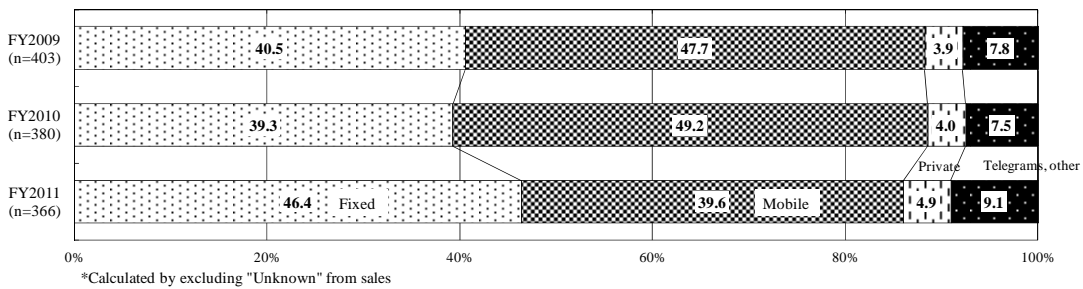


Fig. 2-9 Changes in the Breakdown of Sales of the Private Broadcasting Business

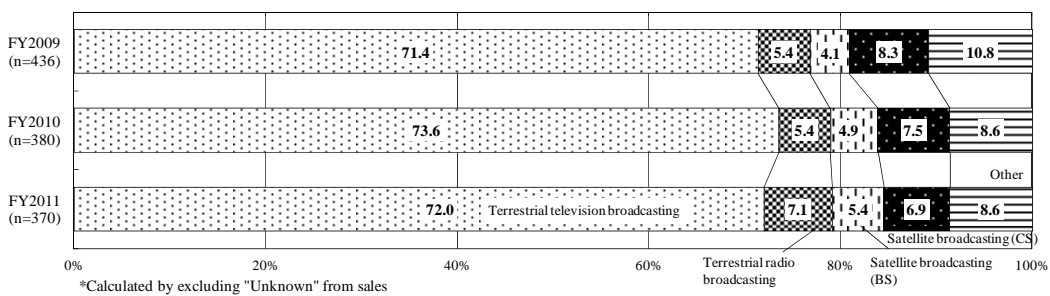
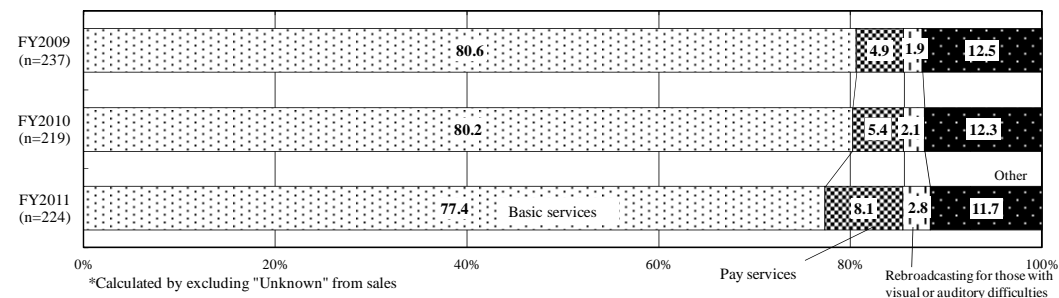


Fig. 2-10 Changes in the Breakdown of Sales of the Cable Television Broadcasting Business



3. Capital investment

- The amount of acquisition and capital investment for the telecommunications and broadcasting business in FY2011 was 1.5691 trillion yen (down 5.7%).
- The amount of acquisition and capital investment in FY2011 for companies that responded to the survey for the second consecutive year was 1.4401 trillion yen (up 3.0%).

Fig. 2-11 Changes in the Amount of Acquisition and Capital Investment by Business Type

(Unit: companies, 100 million yen, %)

Classification	FY2009		FY2010		FY2011	
	Number of companies	Capital investment (composition ratio)	Number of companies	Capital investment (composition ratio)	Number of companies	Capital investment (composition ratio)
Overall	652	26,395 (100.0%)	621	16,636 (100.0%)	622	15,691 (100.0%)
Telecommunications	228	23,694 (89.8%)	223	14,866 (89.4%)	230	14,349 (91.4%)
Broadcasting	424	2,701 (10.2%)	398	1,770 (10.6%)	392	1,342 (8.6%)
Private broadcasting	236	1,393 (5.3%)	209	817 (4.9%)	197	709 (4.5%)
Cable television broadcasting	188	1,308 (5.0%)	189	952 (5.7%)	195	632 (4.0%)

Fig. 2-12 Amount of Acquisition and Capital Investment by Business Type (Companies that Responded to the Survey for the Second Consecutive Year)

(Unit: companies, 100 million yen, %)

Classification	FY2010 performance		Outlook for FY2011		FY2011 performance		Outlook for FY2012	
	Number of companies	Capital investment (composition ratio)	Number of companies	Capital investment (composition ratio)	Number of companies	Capital investment (composition ratio)	Number of companies	Capital investment (composition ratio)
Overall	431	13,985 (100.0%)	365	10,075 (100.0%)	431	14,401 (100.0%)	355	9,713 (100.0%)
Telecommunications	149	12,754 (91.2%)	119	9,109 (90.4%)	149	13,365 (92.8%)	119	8,908 (91.7%)
Broadcasting	282	1,230 (8.8%)	246	967 (9.6%)	282	1,036 (7.2%)	236	804 (8.3%)
Private broadcasting	131	618 (4.4%)	113	544 (5.4%)	131	604 (4.2%)	115	501 (5.2%)
Cable television broadcasting	151	612 (4.4%)	133	423 (4.2%)	151	432 (3.0%)	121	304 (3.1%)

4. Workers

- The number of workers engaged in the telecommunications and broadcasting business was 110,149, and the number of workers per company was 126.
- Looking at the number of workers per company that responded to the survey for the second consecutive year, the number of workers has increased in the telecommunications business.

Fig. 2-13 Number of Workers Engaged in the Telecommunications and Broadcasting Business by Business Type

(Unit: companies, persons)

	Telecommunications/ Broadcasting		Telecommunications		Broadcasting		Private broadcasting		Cable television broadcasting	
	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011
	Number of companies	889	871	324	307	565	564	369	359	196
Number of workers	104,910	110,149	69,407	78,177	35,503	31,972	27,667	23,432	7,836	8,540
Number of regular workers	104,073	109,491	69,045	77,978	35,028	31,513	27,224	23,025	7,804	8,488
Full-time worker/Regular staff member	88,338	86,469	59,180	62,308	29,158	24,161	22,779	18,731	6,379	5,430
Part-timers	6,497	7,115	4,324	5,010	2,173	2,105	1,551	1,521	622	584
Workers transferred to other	1,872	7,109	968	6,459	904	650	805	565	99	85
Temporary or daily workers	837	658	362	199	475	459	443	407	32	52
Dispatched workers	18,857	17,860	11,923	11,322	6,934	6,538	5,772	5,411	1,162	1,127
Number of workers per company	118	126	214	255	63	57	75	65	40	42

Fig. 2-14 Number of Workers Engaged in the Telecommunications and Broadcasting Business (Companies that Responded to the Survey for the Second Consecutive Year)

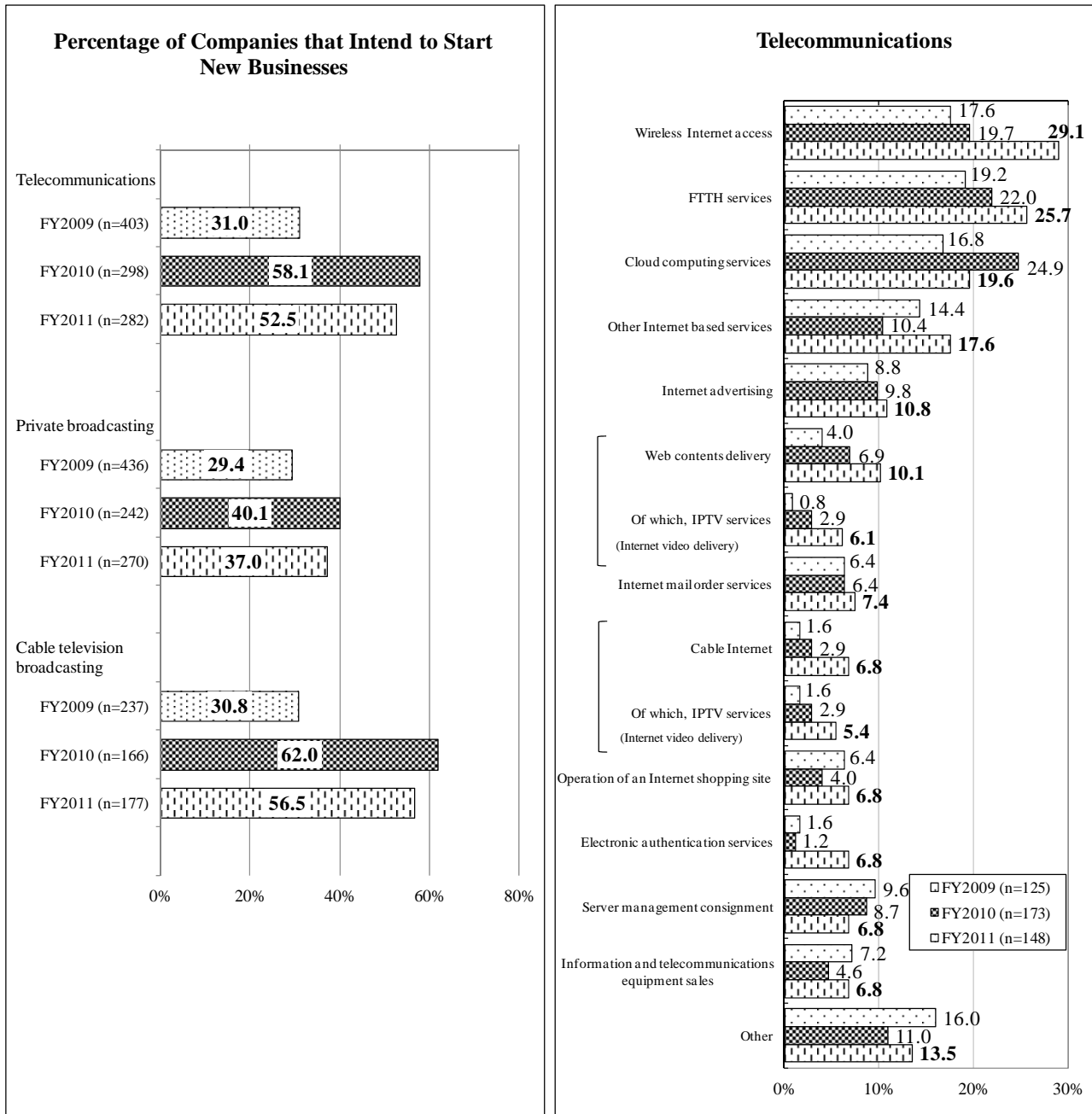
(Unit: companies, persons)

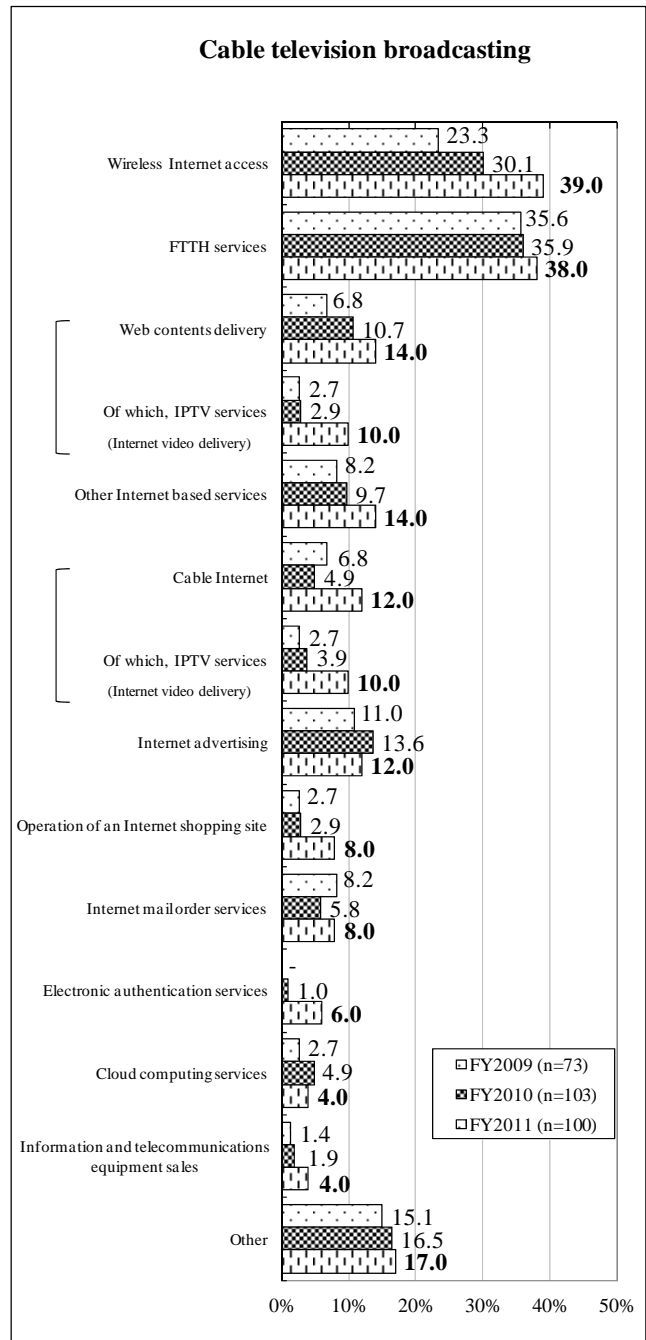
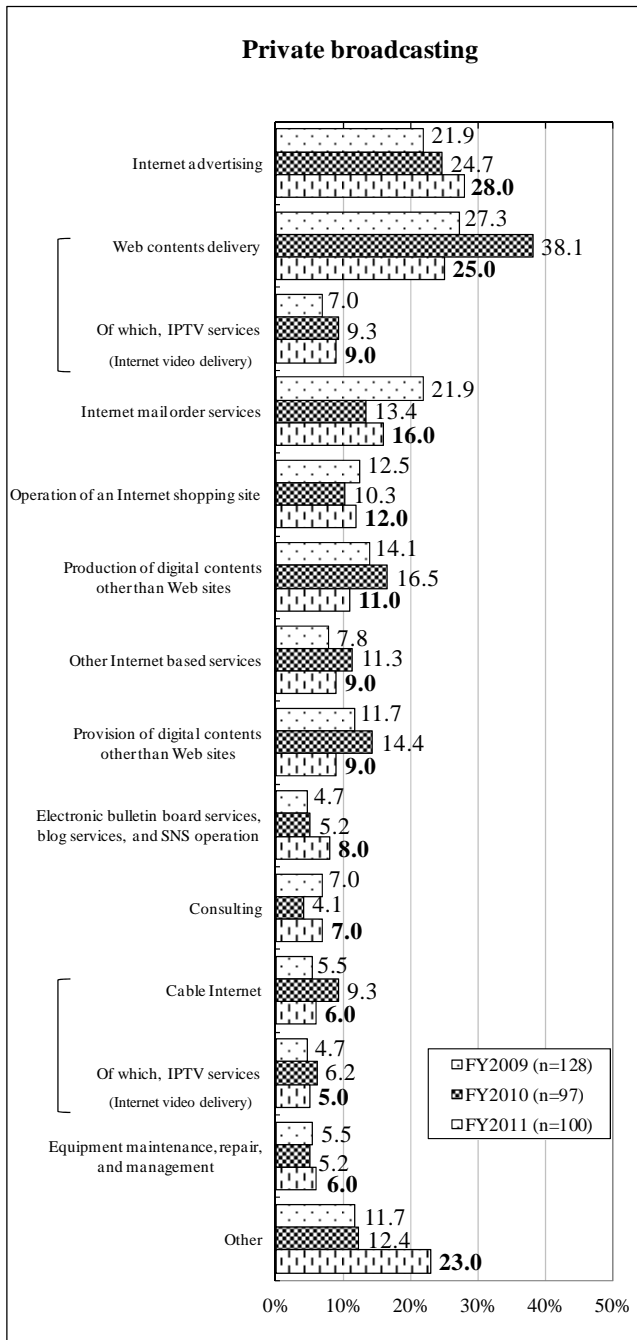
	Telecommunications/ Broadcasting		Telecommunications		Broadcasting		Private broadcasting		Cable television broadcasting	
	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011
	Number of companies	644	644	207	207	437	437	283	283	154
Number of workers	76,963	80,598	50,681	54,321	26,282	26,277	20,659	20,201	5,623	6,076
Number of regular workers	76,471	80,075	50,512	54,190	25,959	25,885	20,360	19,849	5,599	6,036
Full-time worker/Regular staff member	65,624	66,919	44,230	46,394	21,394	20,525	16,865	16,206	4,529	4,319
Part-timers	4,595	4,532	3,025	2,984	1,570	1,548	1,127	1,089	443	459
Workers transferred to other	1,401	1,976	764	1,385	637	591	561	524	76	67
Temporary or daily workers	492	523	169	131	323	392	299	352	24	40
Dispatched workers	13,188	12,937	7,812	7,390	5,376	5,547	4,607	4,750	769	797
Number of workers per company	120	125	245	262	60	60	73	71	37	39

5. Future business operation

- The number of companies that intend to start new businesses within one year has shifted toward a state of decrease in all businesses.
- Regarding new business fields that companies intend to start, the most common answers were “wireless internet access” (29.1% and 39.0%, respectively) in the telecommunications business and the cable television broadcasting business, and “internet advertising” (28.0%) in the private broadcasting business.

Fig. 2-15 New Businesses that Companies Intend to Start within One Year (multiple answers allowed)





(Note) Values represent the ratio of companies that responded that they were intending to start new businesses within one year. For “Cloud computing services” for FY2009, the values tabulated as “ASP· SaaS” are used.

Chapter 3 Broadcast Program Production Business

This Chapter shows the results of the Survey on Items for Each Business Type (Broadcast Program Production) based on valid responses from 299 companies.

1. Composition of business operators (by capital, number of workers, and sales)

The number of companies engaged in the broadcast program production business was 299.

- Business operators with capital of less than 50 million yen accounted for 72.6% (down 3.8 points), and those with less than 100 workers accounted for 91.7% (up 0.4 points). Most of the companies engaged in this business were small- and medium-sized.
- By sales, business operators with sales of “100 million yen to less than 300 million yen” were the largest in number, accounting for 30.1% (down 1.0 points), followed by those with sales of “Less than 50 million yen” (21.1% (up 6.6 points)) and those with sales of “1 billion yen or more” (16.7% (down 3.2 points)).

Fig. 3-1 Composition of Broadcast Program Production Companies by Capital

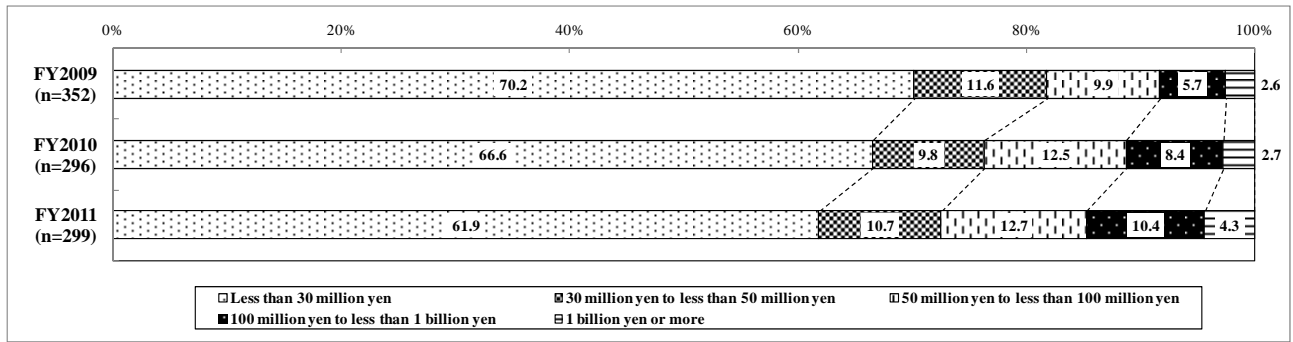


Fig. 3-2 Composition of Broadcast Program Production Companies by Number of Workers

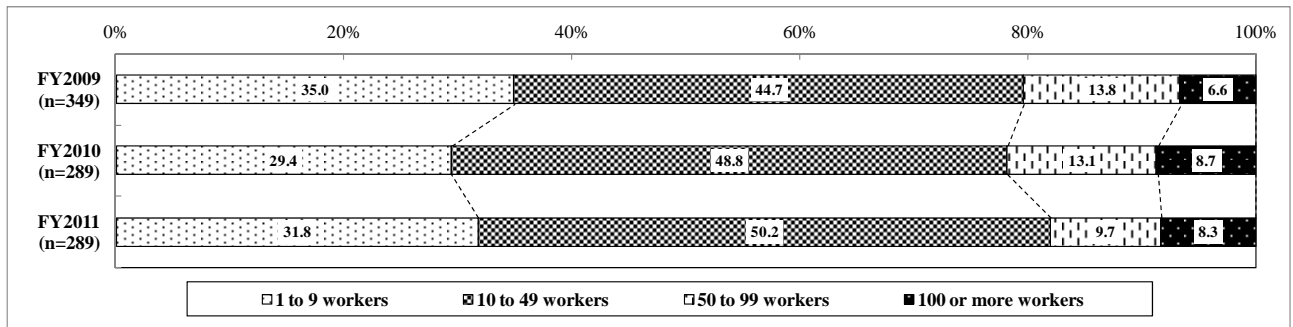
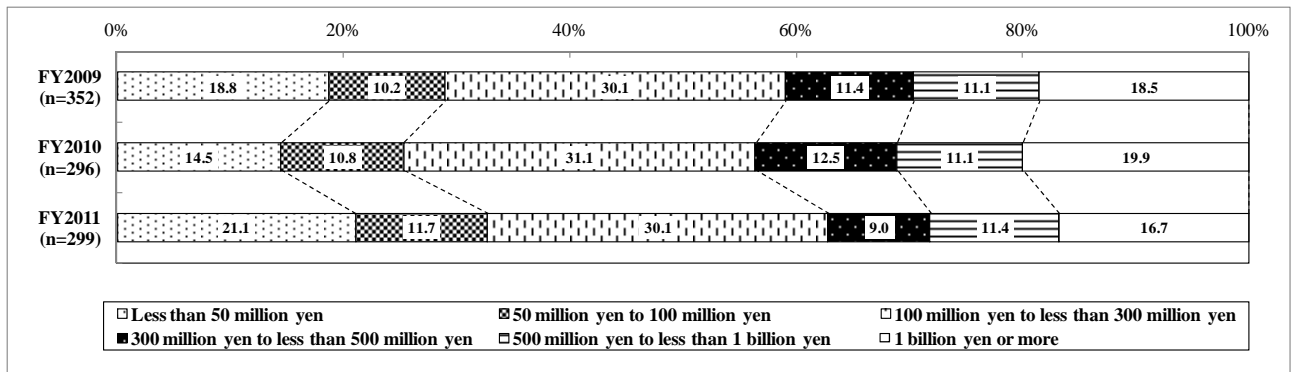


Fig. 3-3 Composition of Broadcast Program Production Companies by Sales



2. Sales

- Sales of the broadcast program production business in FY2011 were 256.8 billion yen (down 12.9%).
- Looking at sales of companies that responded to the survey for the second consecutive year, the amount increased from 197.5 billion yen in FY2010 to 202.3 billion yen in FY2011 (up 2.4%).

Fig. 3-4 Changes in Sales of the Broadcast Program Production Business

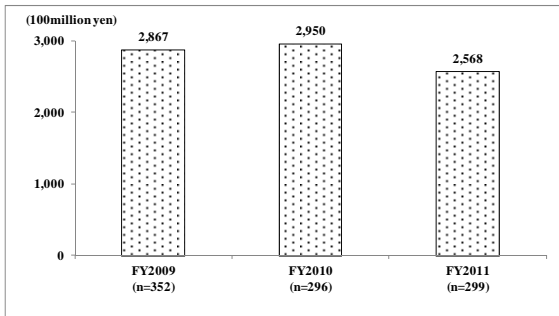
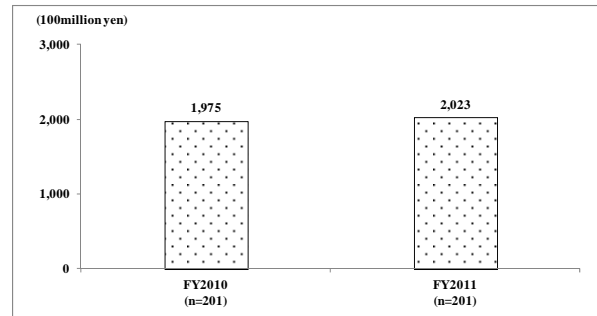


Fig. 3-5 Changes in Sales of Companies that Responded to the Survey for the Second Consecutive Year



3. Secondary use of television broadcast programs

- With regard to broadcast programs for which secondary use is possible based on a company's own intent, the percentage of broadcast program producers that are actually carrying out secondary usage was 75.6% (up 2.5 points).
- Looking at the types of secondary usage, "rebroadcasting the program" was 69.2% (down 2.9 points), "making the program into a video (incl. DVDs, BDs, and CD-ROMs)" was 45.4% (up 1.3 points), and "delivering the program via the Internet" was 28.5% (up 0.6 points).

Fig. 3-6 Secondary Usage of Television Broadcast Programs

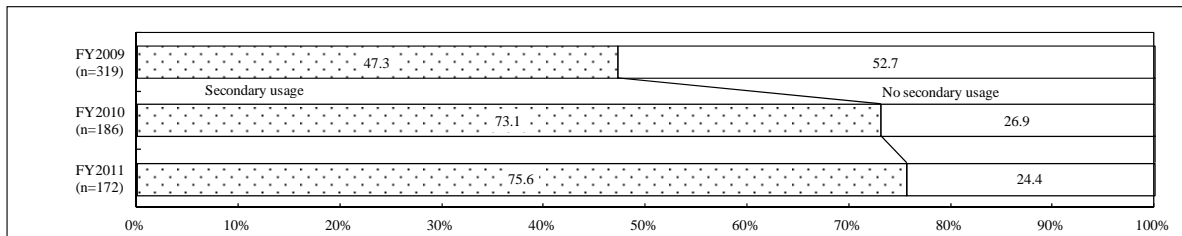
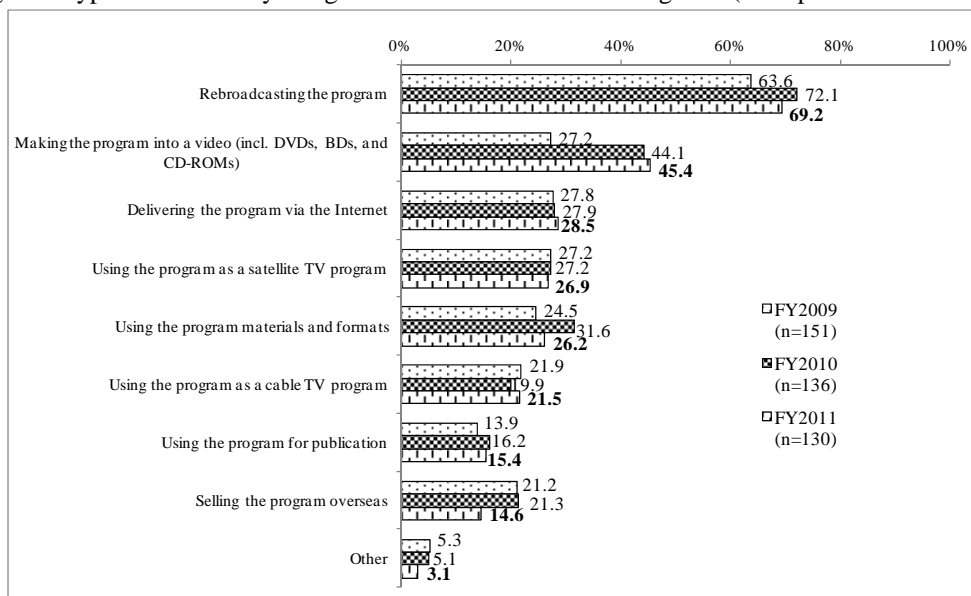


Fig. 3-7 Types of Secondary Usage of Television Broadcast Programs (multiple answers allowed)



4. Capital investment

(1) Ratios of capital investment to sales

- The amount of acquisition and capital investment for the broadcast program production business (companies that provided valid answers to both sales and capital investment) in FY2011 was 4.21 billion yen (down 23.9%) and the ratio of capital investment to sales was 3.1% (up 0.2 points).

Fig. 3-8 Ratios of Capital Investment to Sales of the Broadcast Program Production Business

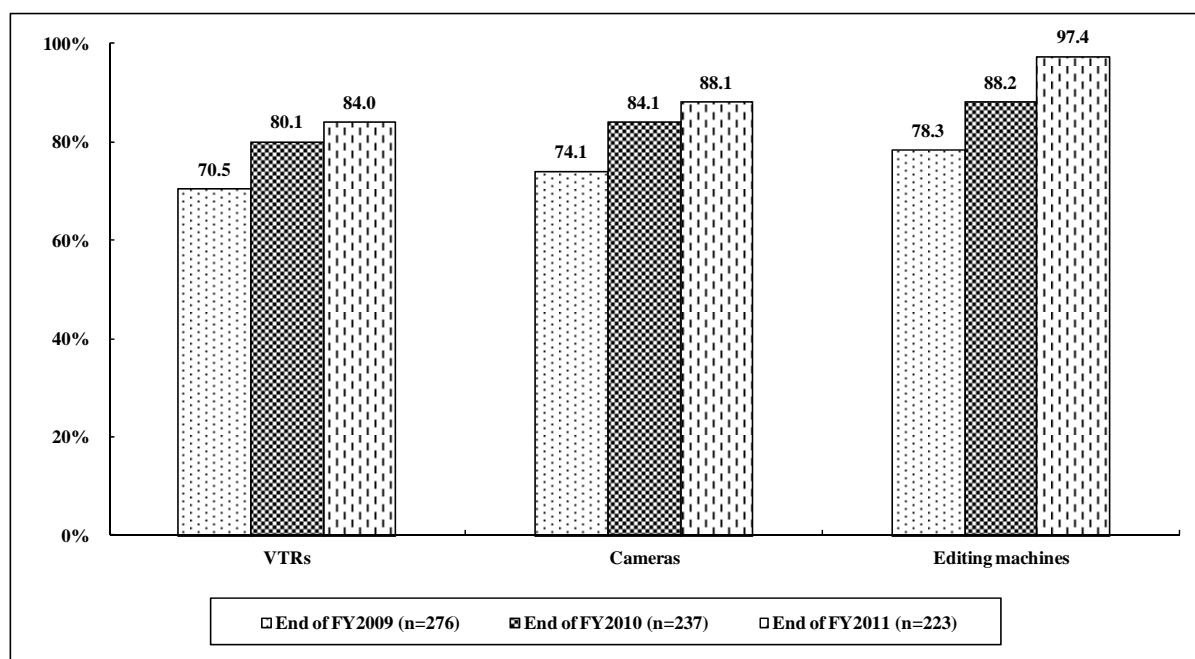
	Number of companies (companies)	Sales (million yen)	Sales per company (million yen)	Amount of acquisitions and capital investments (million yen)	Amount of acquisitions and capital investment per company (million yen)	Ratios of capital investment to sales (%)	(Special tabulation) Companies that responded to the survey for the second consecutive year		
							Sales per company (million yen)	Amount of acquisitions and capital investments (million yen)	Ratios of capital investment to sales (%)
FY2010 performance	126	188,966	1,499.7	5,531	43.9	2.9	1,737.2	37.0	2.1
FY2011 performance	114	133,886	1,174.4	4,208	36.9	3.1	1,340.5	41.0	3.1
Year-on-year (%) / Gap (points)	-9.5	-29.1	-21.7	-23.9	-15.9	0.2 pt	-22.8	10.8	0.9 pt

* Companies that provided valid answers to both sales and capital investment were tabulated.

(2) Digitalization of instruments

- Looking at the digitalization of instruments used for broadcast program production, 84.0% of VTRs (up 3.9 points), 88.1% of cameras (up 4.0 points), and 97.4% of editing machines (up 9.2 points) were digitalized.

Fig. 3-9 Changes in Digitalization Ratios of Instruments Used for Broadcast Program Production



5. Workers

- The number of workers engaged in the broadcast program production business was 10,145 (down 8.5%), out of which 10,025 were regular workers (down 8.6%).
- The number of workers per company was 35 (down 7.9%).

Fig. 3-10 Number of Workers Engaged in the Broadcast Program Production Business by Capital

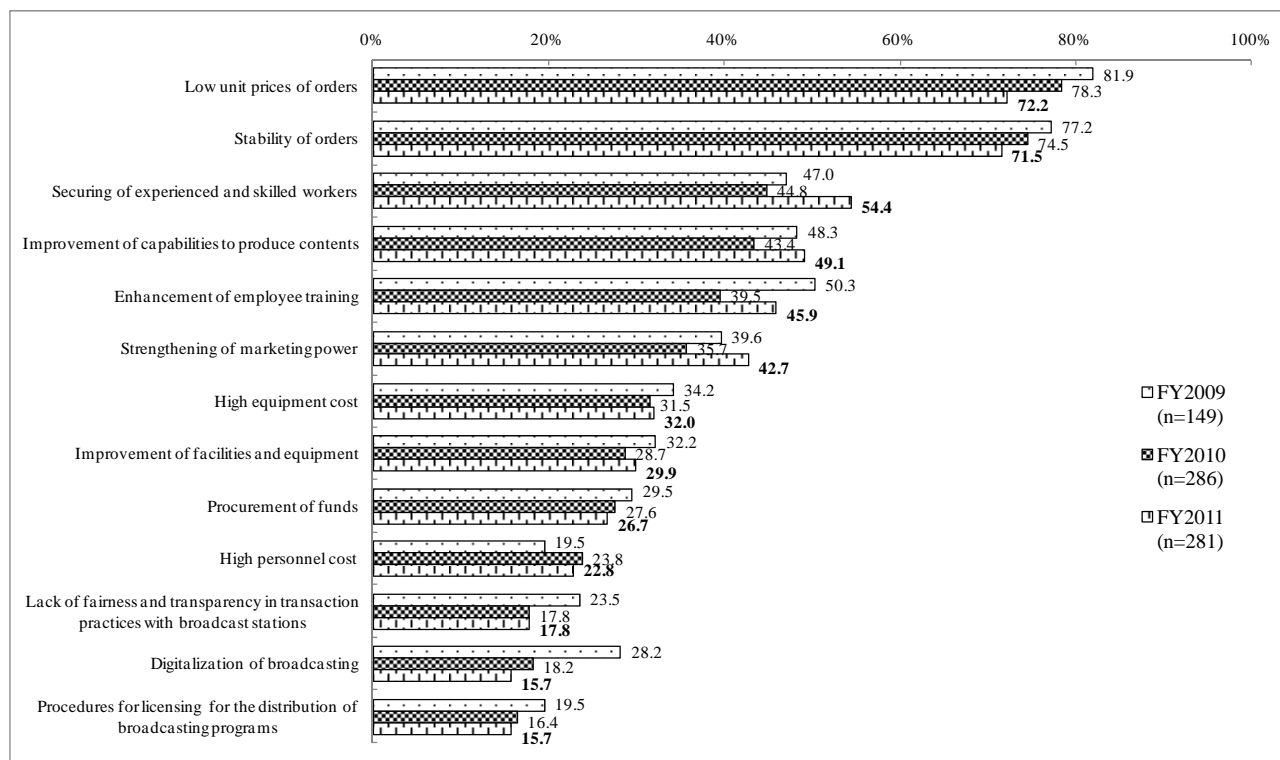
(Unit: companies, persons)

	Overall		Less than 30 million yen		30 million yen to less than 50 million yen		50 million yen to less than 100 million yen		100 million yen to less than 1 billion yen		1 billion yen or more	
	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011	FY2010	FY2011
Number of companies	289	289	194	183	28	29	36	37	24	29	7	11
Number of workers	11,093	10,145	4,613	4,934	1,244	1,360	1,824	1,257	2,621	2,062	791	532
Regular workers	10,966	10,025	4,578	4,888	1,238	1,351	1,785	1,246	2,574	2,009	791	531
Full-time workers/Regular staff members	8,750	7,569	3,404	3,783	1,025	1,057	1,480	825	2,231	1,551	610	353
Part-timers	493	459	318	248	17	28	35	24	120	158	3	1
Workers transferred to other companies	295	303	164	204	73	31	25	27	33	37	-	4
Temporary or daily workers	127	120	35	46	6	9	39	11	47	53	-	1
Dispatched workers	697	350	151	79	102	74	280	43	154	142	10	12
Number of workers per company	38	35	24	27	44	47	51	34	109	71	113	48

6. Management problems

- As management problems in the broadcast program production business, approximately 70% of business operators answered low unit prices of orders (72.2% (down 6.1 points)) and 71.5% answered stability of orders (down 3.0 points). Furthermore, 54.4% answered securing of experienced and skilled workers (up 9.6 points).

Fig. 3-11 Management Problems in the Broadcast Program Production Business (multiple answers allowed)



Chapter 4 Internet Based Service Business

This Chapter shows the results of the Survey on Items for Each Business Type (Internet Based Services) based on valid responses from 523 companies.

1. Number of companies and sales

- Sales per company engaged in the Internet Based Service business were 2.40 billion yen in FY2011 (up 4.9%). Sales per company that responded to the survey for the second consecutive year were 2.91 billion yen (up 13.4%).
- Looking at the composition ratios of the number of companies by capital, companies with capital of less than 100 million yen accounted for 43.2% of the total (up 0.9 points).
- Looking at companies that provided the percentage of their advertising revenue by service type, advertising revenue was the largest for “Web information search services,” accounting for 95.1% of the total revenue (up 2.6 points).

Fig. 4-1 Number of Companies and Sales by Service Type

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)
Total	513	523	1.9	1,173,638	1,254,984	6.9	2,287.8	2,399.6	4.9
Web information search services	61	55	-9.8	210,764	96,640	-54.1	3,455.1	1,757.1	-49.1
Shopping site operation and auction site operation	75	70	-6.7	149,554	152,310	1.8	1,994.1	2,175.9	9.1
Electronic bulletin board services, blog services, and SNS operation	25	20	-20.0	84,378	11,604	-86.2	3,375.1	580.2	-82.8
Web contents delivery services	136	149	9.6	206,737	173,540	-16.1	1,520.1	1,164.7	-23.4
Revenue from IPTV services	11	11	0.0	4,827	5,465	13.2	438.8	496.8	13.2
Cloud computing services	107	116	8.4	59,230	76,157	28.6	553.6	656.5	18.6
Electronic authentication services	13	13	0.0	5,080	12,228	140.7	390.8	940.6	140.7
Information network security services	56	59	5.4	68,865	41,399	-39.9	1,229.7	701.7	-42.9
Charging/settlement agent services	12	15	25.0	32,152	119,698	272.3	2,679.3	7,979.9	197.8
Server management consignment	96	109	13.5	69,172	43,704	-36.8	720.5	401.0	-44.3
Other Internet based services	170	161	-5.3	287,706	386,080	34.2	1,692.4	2,398.0	41.7
(Special tabulation) Companies that responded to the survey for the second consecutive year	378	378	-	970,295	1,099,882	13.4	2,566.9	2,909.7	13.4

(Notes) As some companies operate multiple services businesses, the total number of companies does not necessarily match the sum of the breakdown figures.

As some companies do not provide data on the breakdown of sales, the numbers for total sales and the sum of the breakdown do not match.

*“Shopping site operation and auction site operation” refer to Internet shopping site operation and Internet auction site operation businesses. Hereinafter the same shall apply.

Fig. 4-2 Composition Ratios of the Number of Companies by Capital

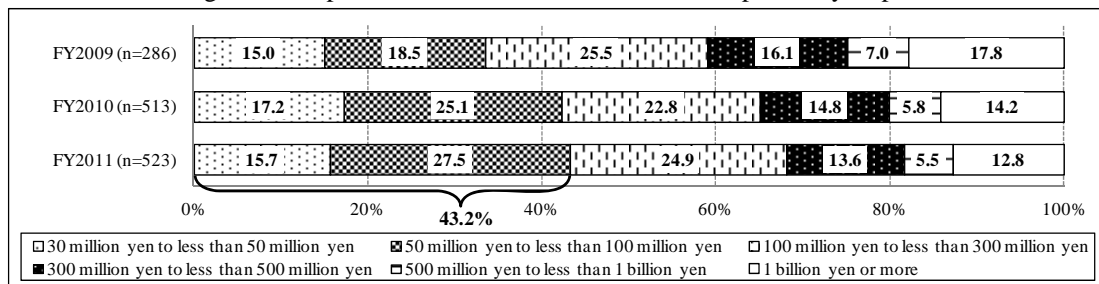
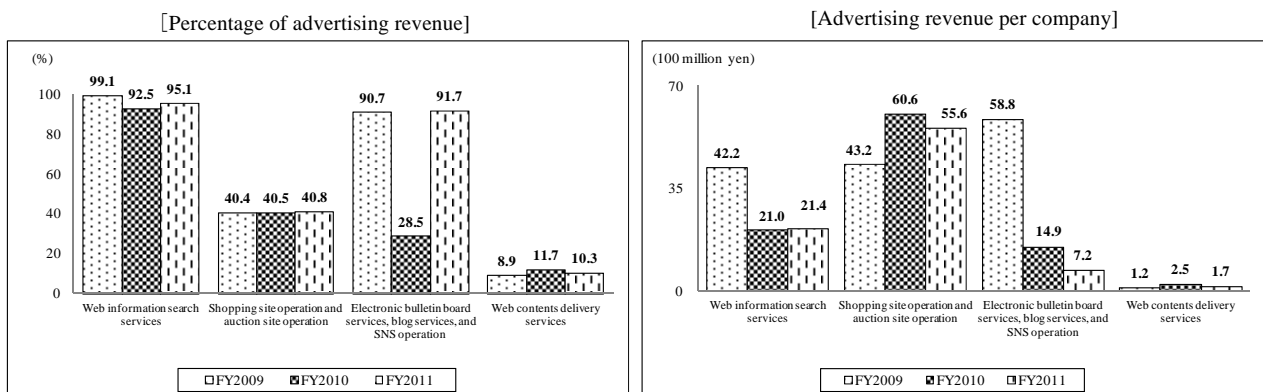


Fig. 4-3 Advertising Revenue by Service Type



(Note) Calculated based on the “Sales” and “Advertising revenue” from companies which provided data on the percentage of their advertising revenue.

2. Capital investment

- The amount of acquisition and capital investment per company was 321 million yen in FY2011 (up 0.2%). The outlook for the next fiscal year (FY2012) is 220 million yen (down 4.4%).
- The ratio of capital investment to sales was 10.3% in FY2011 (down 0.5 points).

Fig. 4-4 Amount of Acquisition and Capital Investment per Company

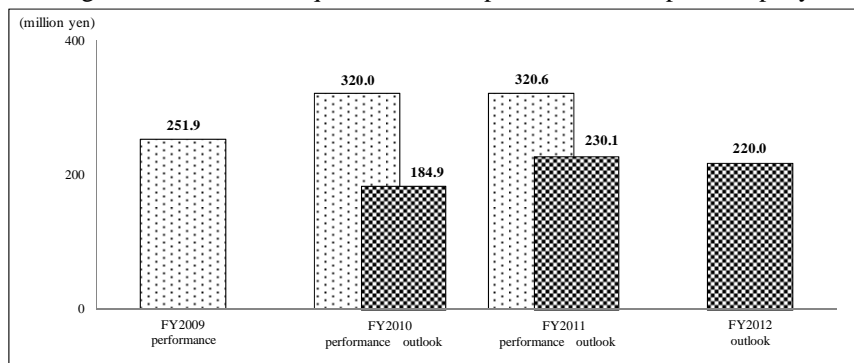


Fig. 4-5 Ratios of Capital Investment to Sales

	Number of companies (companies)	Sales per company (million yen)	Amount of acquisition and capital investment per company (million yen)	Ratios of capital investment to sales (%)	(Special tabulation) Companies that responded to the survey for the second consecutive year	
					Amount of acquisition and capital investment per company (million yen)	Ratios of capital investment to sales (%)
FY2010 performance	296	2,950.2	320.0	10.8	391.6	11.4
FY2011 performance	298	3,123.7	320.6	10.3	406.8	10.9
Year-on-year (%)	0.7	5.9	0.2	-0.5	3.9	-0.5

(Notes) Companies that provided answers to both "Sales" and "Amount of acquisition and capital investment" were subject to tabulation.

Year-on-year comparison for the ratios of capital investment to sales represents the difference from the previous fiscal year.

3. Outsourcing

- 54.7% of companies implemented outsourcing (down 1.4 points).
- The outsourcing cost per company was 483 million yen (up 58.4%).

Fig 4-6 Percentages of Companies Implementing Outsourcing

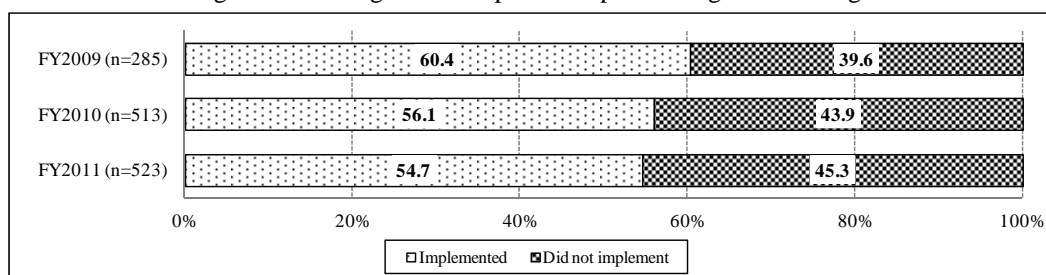


Fig 4-7 Outsourcing by Capital

		Total	30 million yen to less than 50 million yen	50 million yen to less than 100 million yen	100 million yen to less than 300 million yen	300 million yen to less than 500 million yen	500 million yen to less than 1 billion yen	1 billion yen or more
Number of companies that responded (companies)	FY2010	288	45	66	73	43	15	46
	FY2011	279	33	68	76	37	21	44
	Year-on-year (%)	-3.1	-26.7	3.0	4.1	-14.0	40.0	-4.3
Outsourcing cost per company (million yen)	FY2010	304.6	51.1	82.5	126.5	124.0	341.0	1,311.1
	FY2011	482.6	61.3	123.6	129.6	216.9	479.9	2,188.0
	Year-on-year (%)	58.4	20.0	49.8	2.5	74.9	40.7	66.9

4. Workers

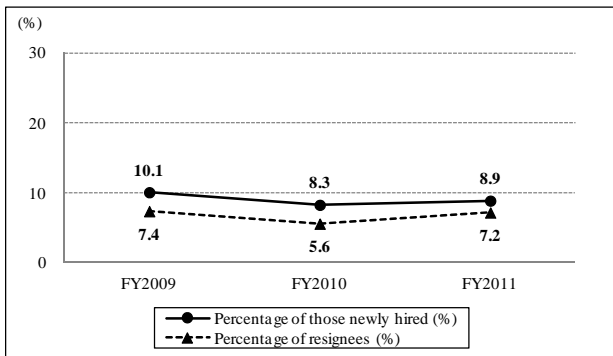
- The number of regular workers per company was 87 (up 22.5%), out of which 66 were full-time workers (up 11.9%).
- Looking at new hires and resignees, the rate of those newly hired and that of resignees for full-time workers were 8.9% (up 0.6 points) and 7.2% (up 1.6 points), respectively. The rate of contract workers newly hired and that of those with cancelled contracts were 29.8% (up 4.1 points) and 24.9% (down 1.5 points), respectively. The rate of contract cancellation for contract workers was high as compared to the rate of resignation of full-time workers.

Fig. 4-8 Number of Workers

	FY2009		FY2010		FY2011	
		Per company		Per company		Per company
Number of companies that provided valid answers (companies)	286	-	513	-	523	-
Number of workers (persons)	22,726	79	36,610	71	45,589	87
Number of regular workers	22,707	79	36,373	71	45,375	87
Full-time workers/regular staff members	19,509	68	30,025	59	34,616	66
Part-timers	772	3	1,405	3	3,070	6
Workers transferred to other companies	281	1	1,286	3	1,472	3
Contract workers	1,110	4	1,690	3	4,972	10
Temporary or daily workers	19	0	237	0	214	0
Dispatched workers (persons)	2,638	9	4,808	9	4,579	9

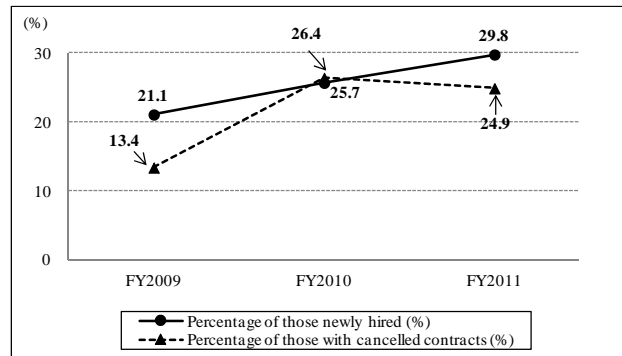
Fig. 4-9 New Hires and Resignees

[Full-time workers/regular staff members]



(Notes) Percentage of those newly hired = Number of those newly hired / (Number of full-time workers + Number of resignees) × 100
 Percentage of resignees = Number of resignees / (Number of full-time workers + Number of resignees) × 100

[Contract workers]

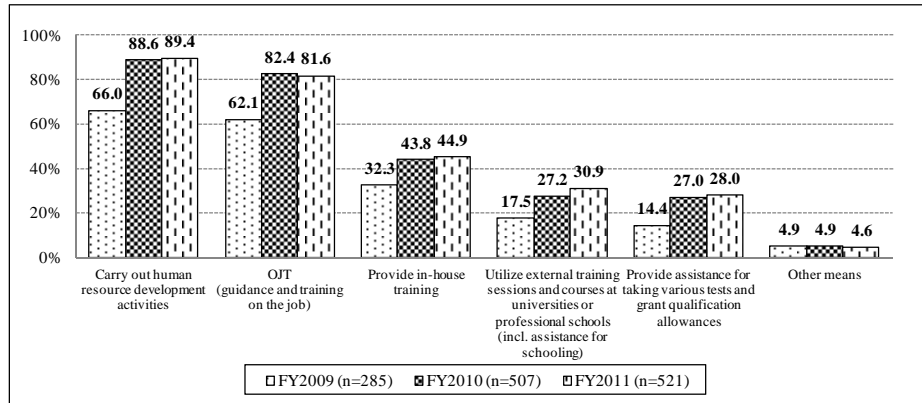


(Notes) Percentage of those newly hired = Number of those newly hired / (Number of contract workers + Number of those with cancelled contracts) × 100
 Percentage of those with cancelled contracts = Number of those with cancelled contracts / (Number of contract workers + Number of those with cancelled contracts) × 100

5. Human resource development

- Companies that carried out human resource development activities accounted for 89.4% (up 0.8 points). Of them, 81.6% provided OJT (guidance and training on the job) (down 0.8 points).

Fig. 4-10 Percentage of Companies that Carried Out Human Resource Development Activities

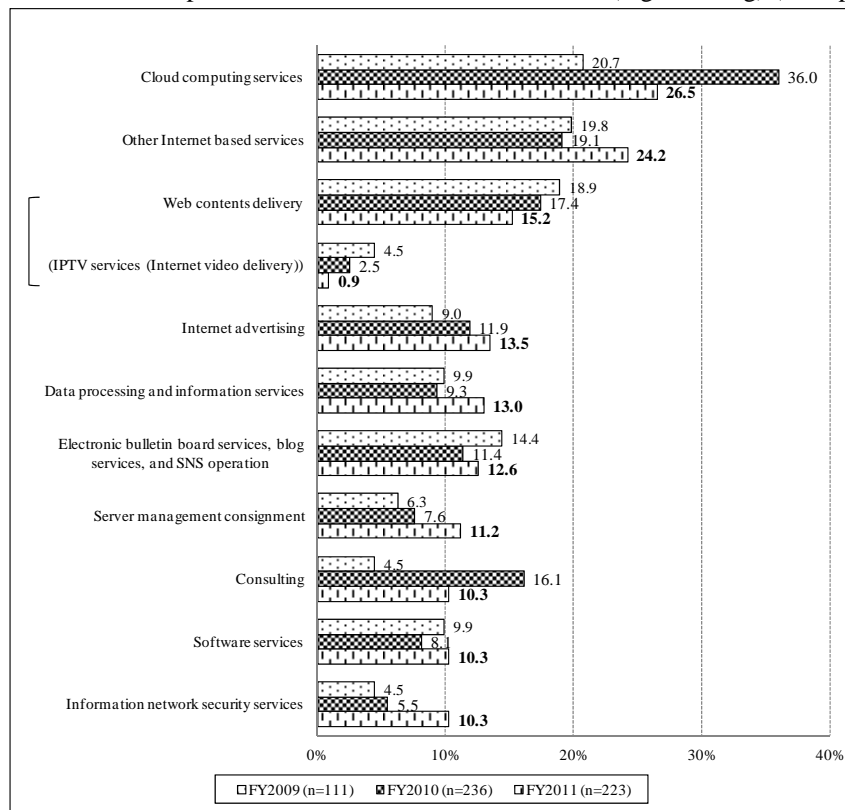


(Note) Multiple answers are allowed for activity contents

6. New business fields

- Regarding new business fields that companies intend to start within one year, the most common answer was “cloud computing services” (26.5%, down 9.5 points), followed by “Web contents delivery” (15.2%, down 2.2 points) and “Internet advertising” (13.5%, up 1.6 points).

Fig. 4-11 New Businesses that Companies Intend to Start within One Year (high ranking) (multiple answers allowed)



Note: Figures are obtained by dividing the number of responses by the number of companies that provided valid responses to this question.

For “Cloud computing services” for FY2009, the values tabulated as “ASP-SaaS” are used.

Chapter 5 Information Service Business

This Chapter shows the results of the Survey on Items for Each Business Type (Information Services) based on valid responses from 3,312 companies.

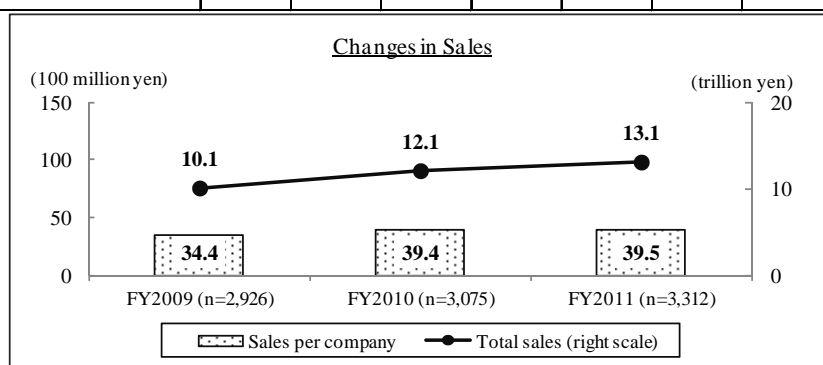
1. Number of companies and sales

- The sales per company engaged in the information services business was 3.95 billion yen in FY2011 (up 0.3%), with an increase in sales by game software service companies (up 71.1%) and miscellaneous information service companies (up 6.6%).
- Looking at the composition ratios of the number of companies and sales by sector, in both cases, custom software service companies accounted for the largest, followed by data processing service companies, and miscellaneous information service companies.
- Looking at the composition ratios of the number of companies by sales, companies with less than 1 billion yen in sales represented 60.2%. By sector, in research & information service companies, package software service companies, and custom software service companies, those with less than 1 billion yen in sales represented over 60%.

(Note) Data for Chapter 5 are compiled based on companies' main business, rated according to their business that generates the largest sales, and are tabulated as "XX companies."

Fig. 5-1 Number of Companies and Sales by Sector (Based on Companies' Main Business)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)
Total	3,075	3,312	7.7	12,128,748	13,097,536	8.0	3,944.3	3,954.6	0.3
Custom software service companies	1,565	1,636	4.5	6,201,332	6,319,914	1.9	3,962.5	3,863.0	-2.5
Embedded software service companies	107	111	3.7	172,363	161,735	-6.2	1,610.9	1,457.1	-9.5
Package software service companies	255	261	2.4	326,508	342,935	5.0	1,280.4	1,313.9	2.6
Game software service companies	52	62	19.2	145,596	296,949	104.0	2,799.9	4,789.5	71.1
Data processing service companies	575	627	9.0	2,933,634	2,999,287	2.2	5,102.0	4,783.6	-6.2
Research & information service companies	139	141	1.4	285,163	246,041	-13.7	2,051.5	1,745.0	-14.9
Miscellaneous information service companies	382	474	24.1	2,064,152	2,730,675	32.3	5,403.5	5,760.9	6.6
(Special tabulation) Companies that responded to the survey for the second consecutive year	2,608	2,608	-	11,055,871	11,460,320	3.7	4,239.2	4,394.3	3.7



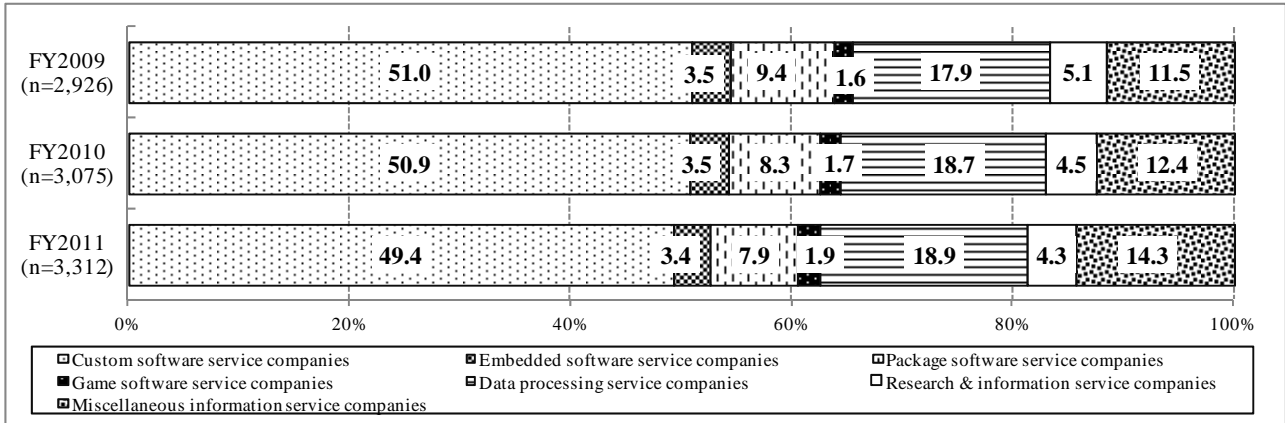
(Reference: Based on Companies' Activities)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)
Total	3,075	3,312	7.7	12,128,748	13,097,536	8.0	3,944.3	3,954.6	0.3
Custom software service	2,163	2,248	3.9	5,781,104	5,807,531	0.5	2,672.7	2,583.4	-3.3
Embedded software service	275	313	13.8	266,975	284,779	6.7	970.8	909.8	-6.3
Package software service	646	677	4.8	642,864	640,559	-0.4	995.1	946.2	-4.9
Game software service	72	91	26.4	146,902	283,866	93.2	2,040.3	3,119.4	52.9
Data processing service	1,031	1,069	3.7	2,892,990	3,014,072	4.2	2,806.0	2,819.5	0.5
Research & information service	235	241	2.6	275,673	283,703	2.9	1,173.1	1,177.2	0.3
Miscellaneous information service	891	1,041	16.8	2,122,240	2,783,026	31.1	2,381.9	2,673.4	12.2

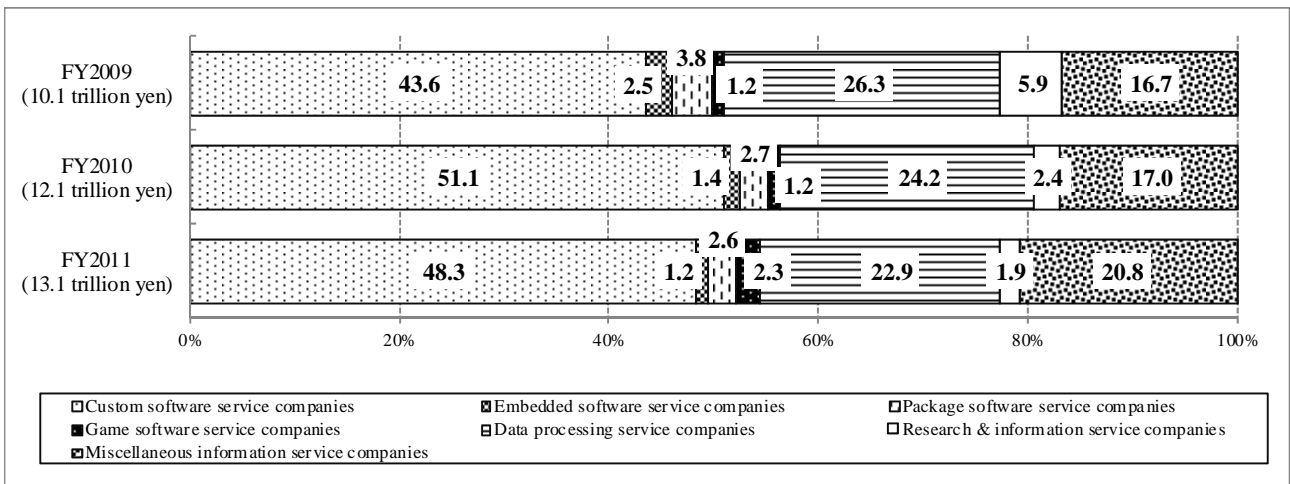
(Note) The number of companies represents the number of companies that are operating relevant businesses even at the very minimum, and thus, the total and the sum of the breakdown do not match.

Fig. 5-2 Composition Ratios of the Number of Companies and Sales
(Based on Companies' Main Business)

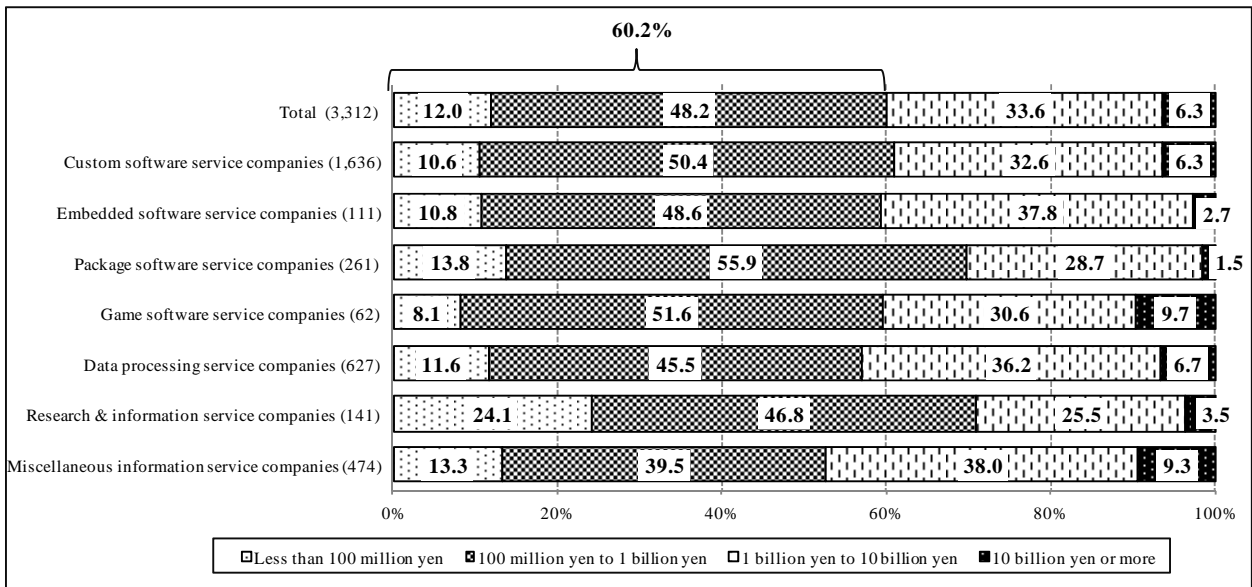
[Composition Ratio of the Number of Companies by Sector]



[Composition Ratio of Sales by Sector]



[Composition Ratio of the Number of Companies by Sales]

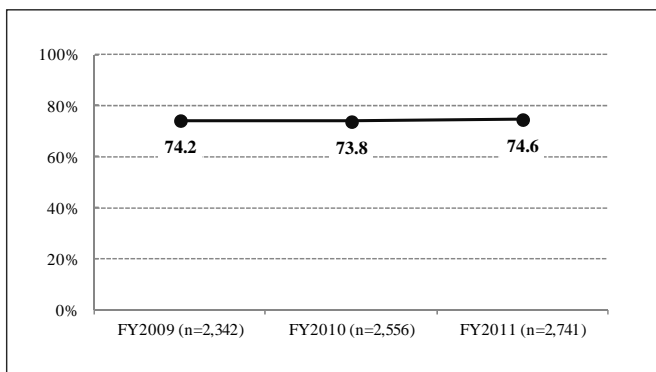


2. Outsourcing in the development and production section

- The percentage of companies that outsourced work was 74.6% (up 0.8 points).
- The outsourcing cost per company was 1.14 billion yen (down 13.0%).
- 3.0% of the total was outsourced overseas (up 0.6 points). Looking at outsourcing costs by region, those to China, the United States, and India has increased.
- Per company, 233.9 pieces of work were outsourced (down 7.9%). Of these, there were sales-based payments for 53.0 pieces of work (up 19.4%). Sales-based payment was adopted in 22.7% (up 5.2 points).

Fig. 5-3 Outsourcing

[Percentage of companies that implemented outsourcing]



[Outsourcing cost per company]

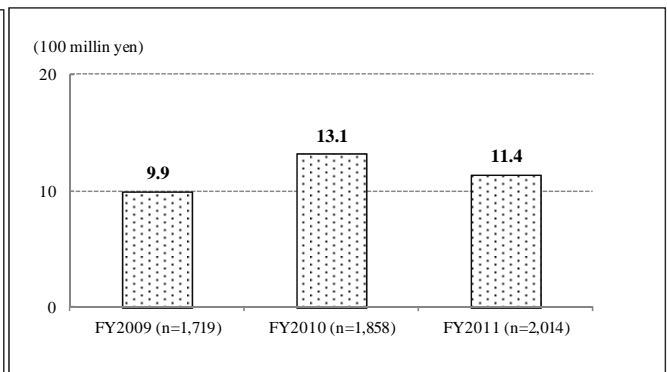
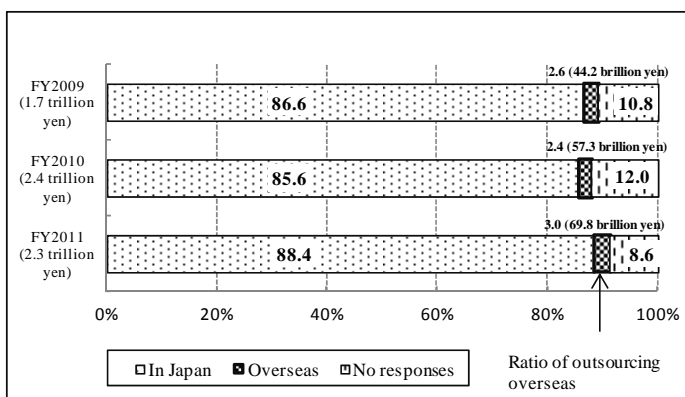
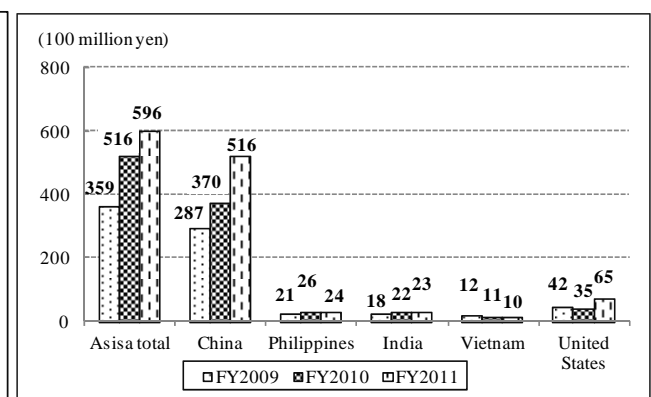


Fig. 5-4 Outsourcing Overseas

[Composition ratios in Japan and overseas]



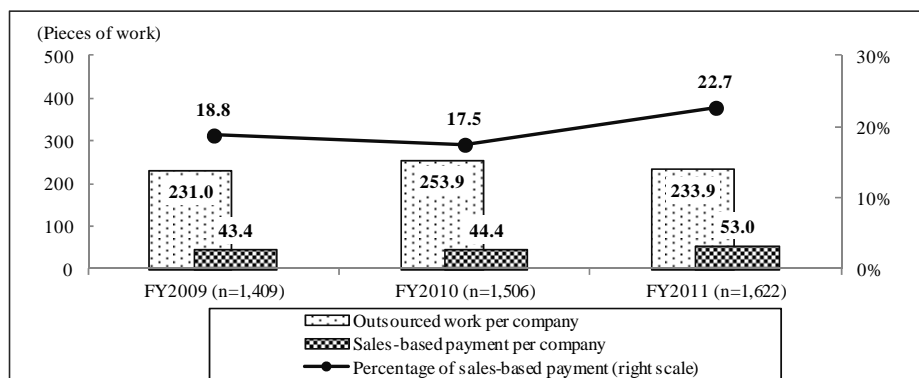
[Outsourcing costs overseas by region]



(Note) Includes companies that gave no responses regarding destinations.

(Note) Totals are based on cost data provided by each overseas region

Fig.5-5 Outsourced work and Sales-Based Payment



(Note) "Sales-based payment" refers to a payment method based on the sales and profits of the orderer.

3. Acceptance of commissioned work in the development and production section

- Companies that accepted work commissioned by other companies accounted for 90.1% (down 0.2 points).
- The amount of accepted commissioned work per company was 2.51 billion yen (up 4.1%).
- Of the total, 3.7% was commissioned from overseas (up 3.6 points). Looking at the amount of accepted commissioned work by region, acceptance of commissioned work from Europe, China and India has increased.
- Looking at the percentages of the number of companies according to primary contractors and subcontractors, the percentage of primary contractors accounted for 86.2% (up 0.8 points), and first subcontractors accounted for 56.5% (down 1.4 points). By capital, the percentage of primary contractors increased, and the percentage of subcontractors decreased, as capital was larger.

Fig. 5-6 Acceptance of Commissioned Work

[Percentage of companies that accepted commissioned work] [Amount of accepted commissioned work per company]

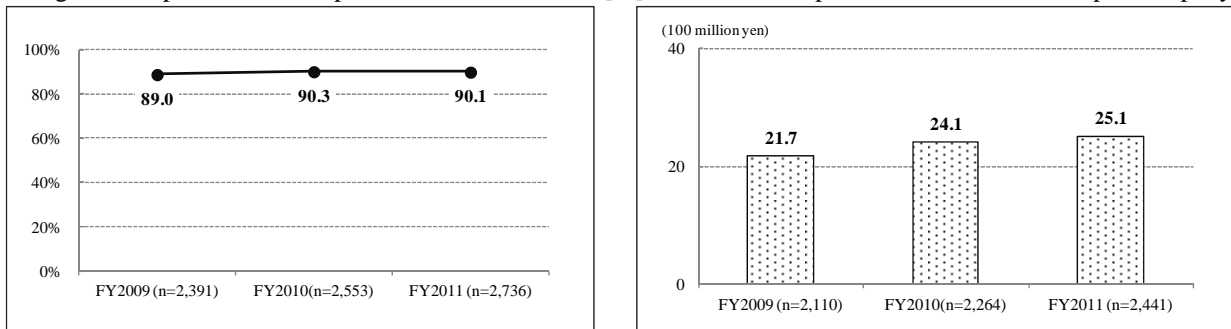
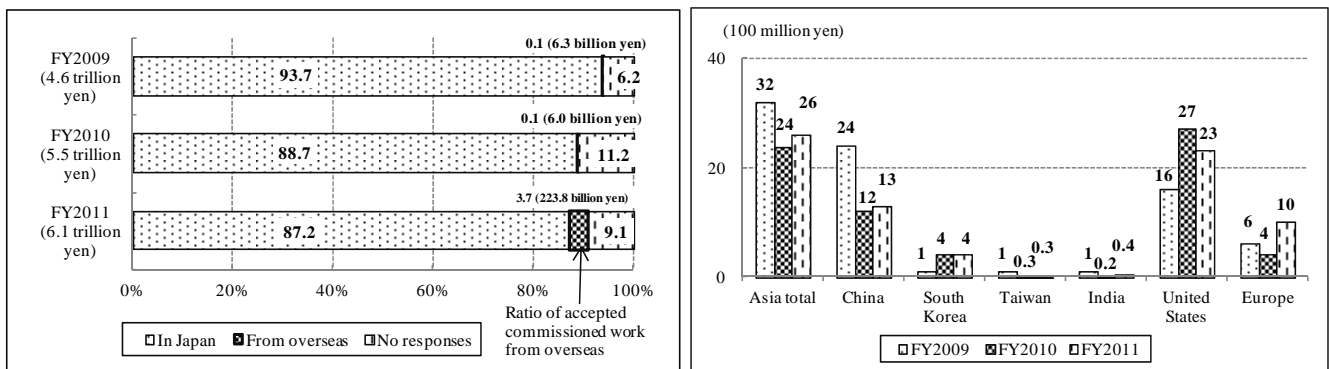


Fig. 5-7 Acceptance of Commissioned Work from Overseas

[Composition ratios in Japan and overseas]

[Amount of accepted commissioned work from overseas]



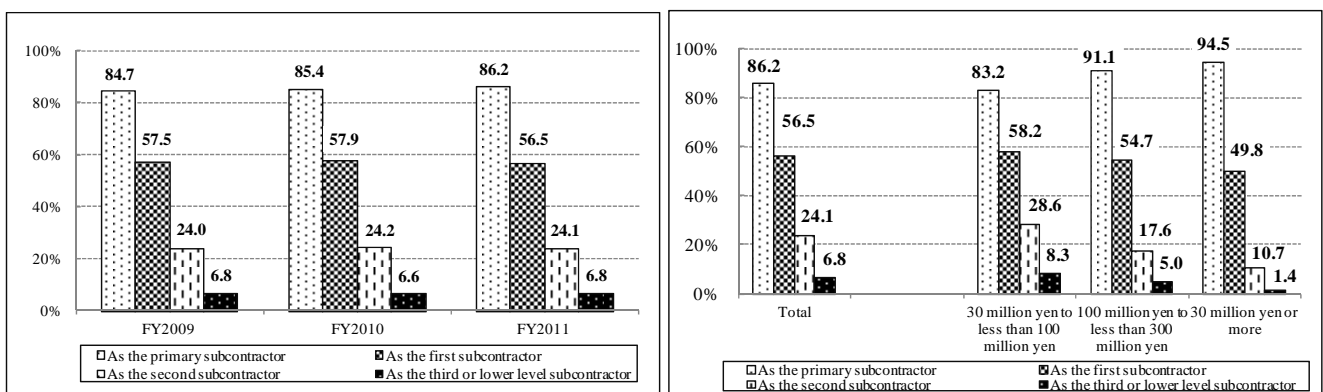
(Note) Includes companies that gave no responses regarding from where they accepted commissioned work.

(Note) Totals are based on cost data provided by each overseas region.

Fig. 5-8 Primary Contractors and Subcontractors

[Percentage of Number of Contractors and Subcontractors]

[Percentage of Number of Companies by Capital]



(Note) Multiple answers were allowed for implementation of primary contractors and subcontractors; numbers are counted using the number of companies for which there were valid responses

4. Number of workers in the development and production section

- The number of regular workers per company was 175 (down 5.4%), 155 were full-time workers (down 6.6%), 5 were part-time workers (up 66.7%) and 14 were dispatched workers (down 12.5%). Looking at composition ratios of regular workers, full-time workers accounted for 88.5% (down 1.4 points), and are tending to decrease year by year.
- The number of foreign full-time workers was 5,613. Its composition ratio of regular workers was 1.2% (up 0.2 points). By region, the number of full-time workers from India, China, Philippines and the United States has increased. The number of foreign contract workers was 492. Chinese numbers has decreased.
- The percentage of full-time workers and contract workers newly hired (percentage of those newly hired) surpassed that of resignees (percentages of those with cancelled contracts). In comparison to full-time workers, there has been a greater change in the percentage of newly hired and resigning contract workers.

Fig. 5-9 Number of workers in the Development and Production Section

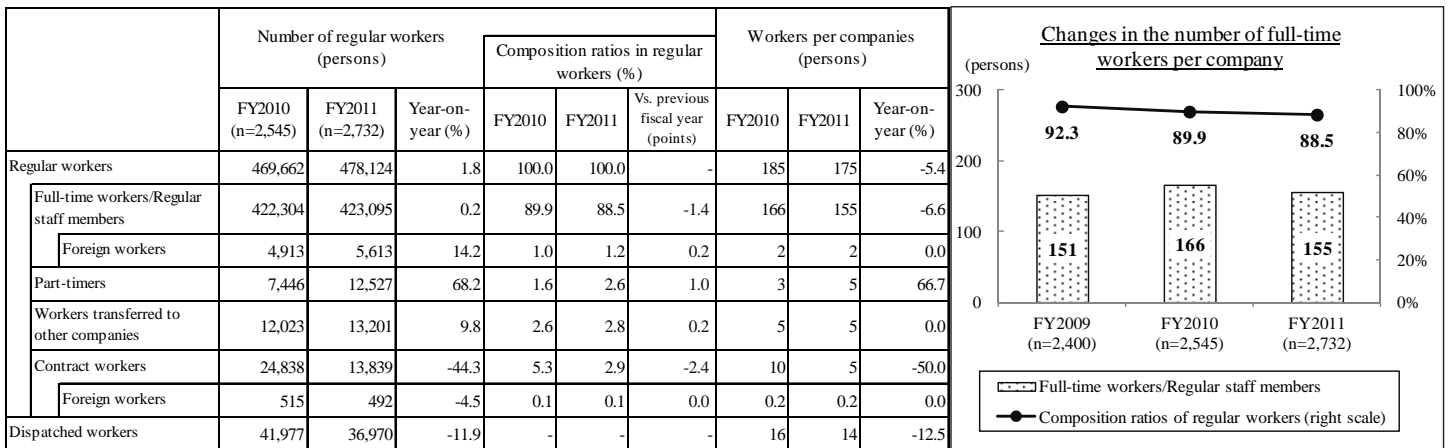


Fig.5-10 Number of Foreign Workers by Region

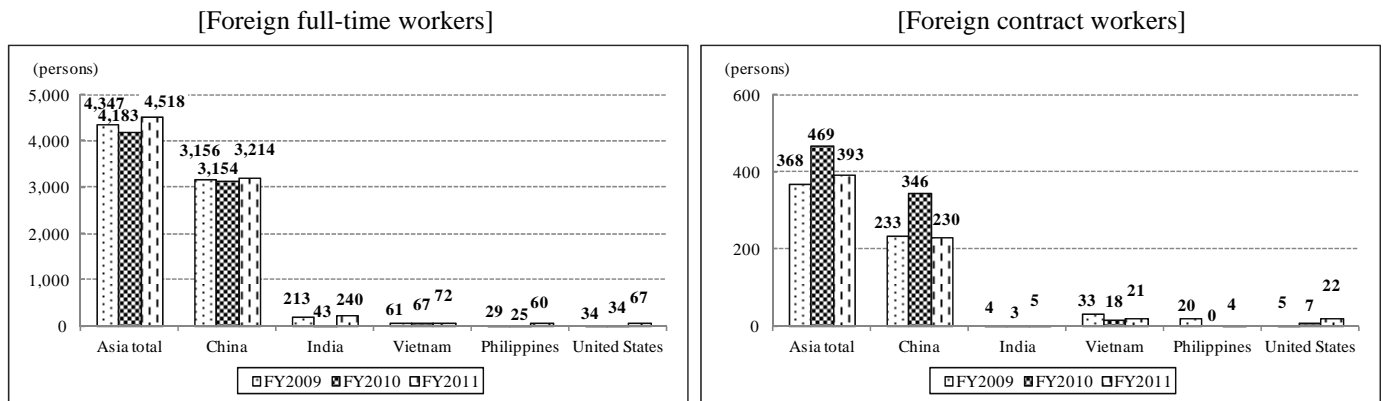
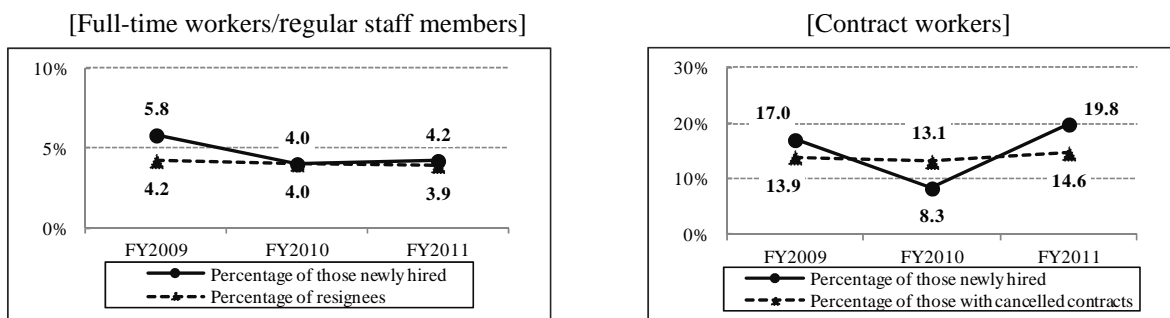


Fig. 5-11 New Hires and Resignees



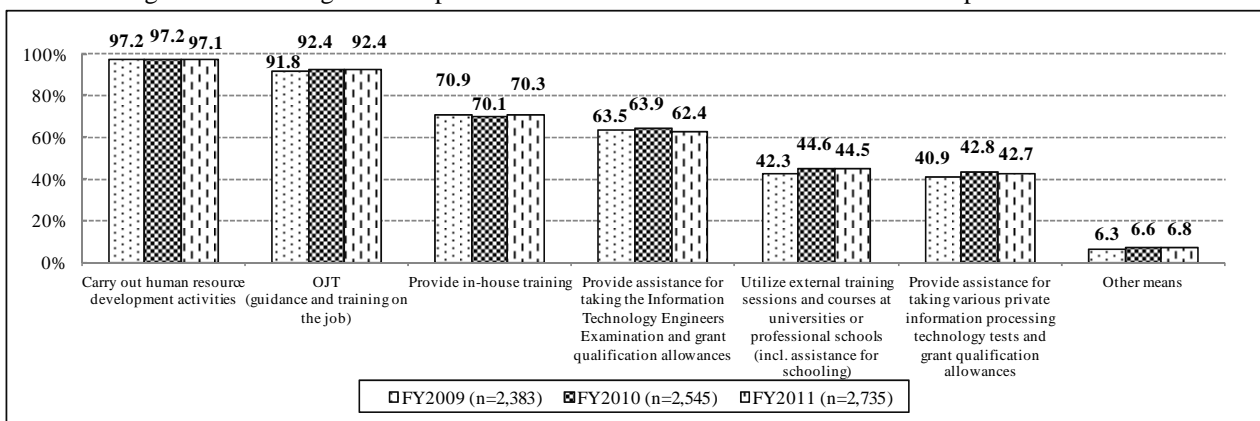
(Notes) Percentage of those newly hired = Number of those newly hired / (Number of full-time workers + Number of resignees) x 100
 Percentage of resignees = Number of resignees / (Number of full-time workers + Number of resignees) x 100

(Notes) Percentage of those newly hired = Number of those newly hired / (Number of contract workers + Number of those with cancelled contracts) x 100
 Percentage of those with cancelled contracts = Number of those with cancelled contracts / (Number of contract workers + Number of those with cancelled contracts) x 100

5. Human resource development in the development and production section

- The percentage of companies that carried out human resource development activities accounted for 97.1% (down 0.1 points). Of them, 92.4% provided OJT (guidance and training on the job) (0.0 points difference), 70.3% provided in-house training (up 0.2 points) and 62.4% provided assistance for taking the Information Technology Engineers Examination and granted qualification allowances (down 1.5 points).
- The percentage of companies using IT skill standards (ITSS) was 30.0% (down 1.3 points). The percentage of companies using the Embedded Technology Skill Standards (ETSS) was 6.5% (down 0.1 points). The percentage of companies using the Users' Information Systems Skill Standards (UISS) was 5.4% (up 0.4 points).
- The percentage of companies carried out business-academia collaborations was 14.2% (up 0.4 points). The percentage of companies provided employee training by utilizing universities was 3.8% (down 0.6 points). The percentage of companies offered cooperation for university education was 24.4% (down 0.9 points).

Fig. 5-12 Percentage of Companies that Carried Out Human Resource Development Activities



(Note) Multiple answers are allowed for activity contents

Fig. 5-13 Percentage of Companies Using Skill Standards

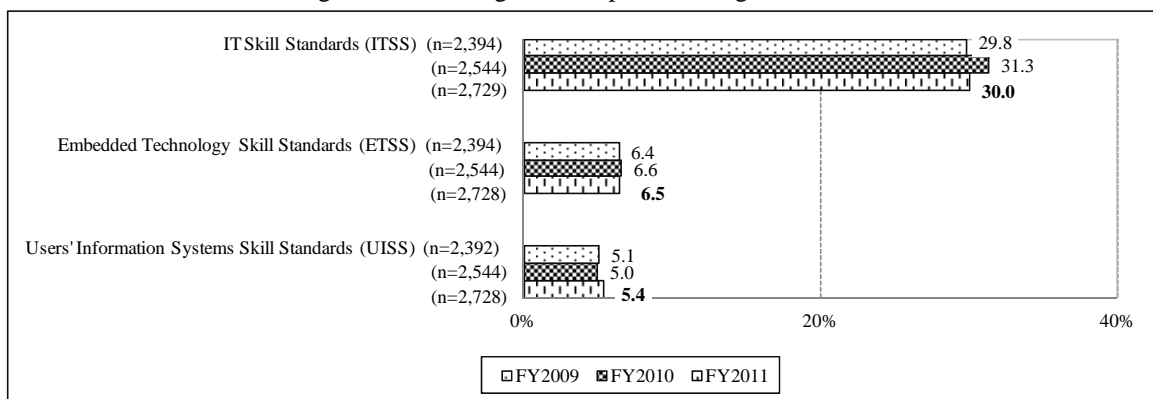
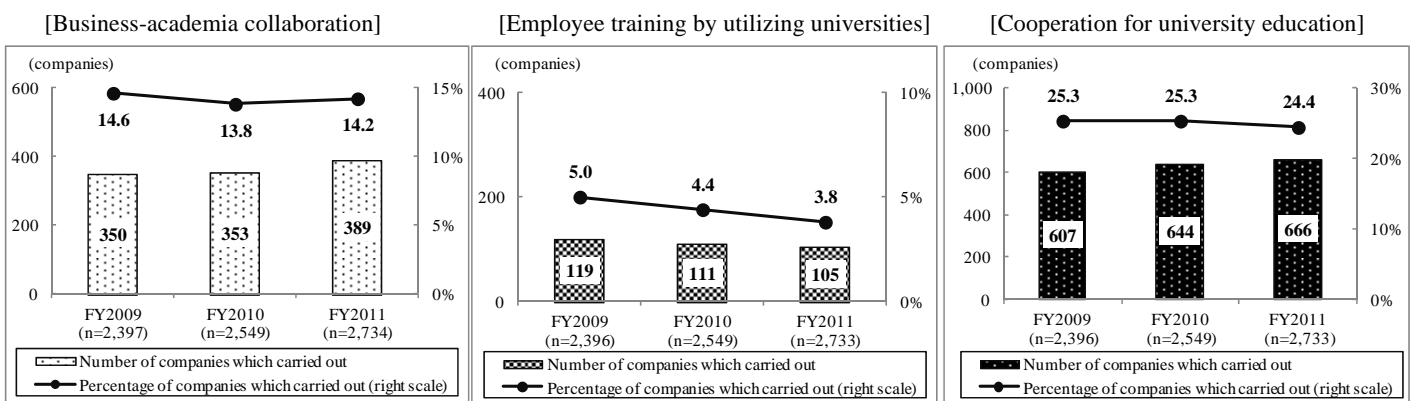


Fig. 5-14 University-related Business Operations



Chapter 6 Video Picture, Sound Information, Character Information Production and Distribution Business

This Chapter shows the results of the Survey on Items for Each Business Type (Video Picture, Sound Information, Character Information Production and Distribution) based on valid responses from 613 companies.

1. Number of companies and sales

- The sales per company engaged in the video picture, sound information, character information production and distribution business in FY2011 was 4.23 billion yen (down 8.8%).
- Looking at the composition ratios of the number of companies by sales, companies with less than 500 million yen were 43.5% (up 8.5 points).
- Looking at the composition ratios of the number of companies by sector, other publishers accounted for the majority, at 35.7% (up 4.4 points), followed by the number of commercial art and graphic design companies, at 18.4% (down 0.8 points).
- Looking at the composition ratios of sales by sector, sales by newspaper publishers accounted for the majority, at 39.4% (up 9.4 points), followed by sales by other publishers, at 31.9% (down 2.1 points).

(Note) Data for Chapter 6 are compiled based on companies' main business, rated according to their business that generates the largest sales, and are tabulated as "XX companies."

Fig. 6-1 Number of Companies and Sales by Sector (Based on Companies' Main Business)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)
Total	479	613	28.0	2,224,986	2,595,904	16.7	4,645.1	4,234.8	-8.8
Motion picture & video production companies	59	52	-11.9	162,198	85,088	-47.5	2,749.1	1,636.3	-40.5
Animation production companies	10	16	60.0	16,506	24,213	46.7	1,650.6	1,513.3	-8.3
Recording and disk production companies	4	14	250.0	20,400	45,047	120.8	5,100.0	3,217.6	-36.9
Newspaper publishers	67	96	43.3	667,918	1,022,915	53.1	9,968.9	10,655.4	6.9
Other publishers	150	219	46.0	757,324	827,928	9.3	5,048.8	3,780.5	-25.1
Commercial art and graphic design companies	92	113	22.8	372,272	414,190	11.3	4,046.4	3,665.4	-9.4
Motion picture, video & TV program distribution companies	20	12	-40.0	117,420	65,050	-44.6	5,871.0	5,420.8	-7.7
Service companies incidental to video picture, sound information, character information production & distribution	77	91	18.2	110,948	111,473	0.5	1,440.9	1,225.0	-15.0
(Special tabulation) Companies that responded to the survey for the second consecutive year	348	348	-	2,007,775	2,007,023	0.0	5,769.5	5,767.3	0.0

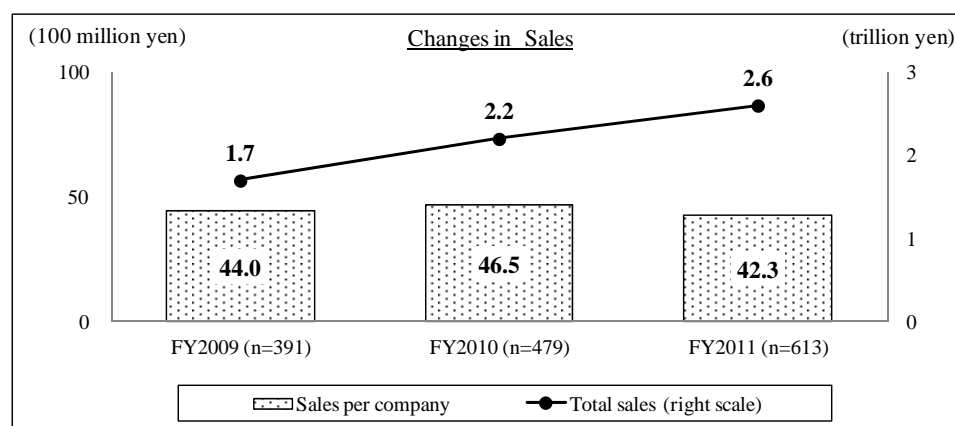


Fig.6-2 Composition Ratios of the Number of Companies by Sales

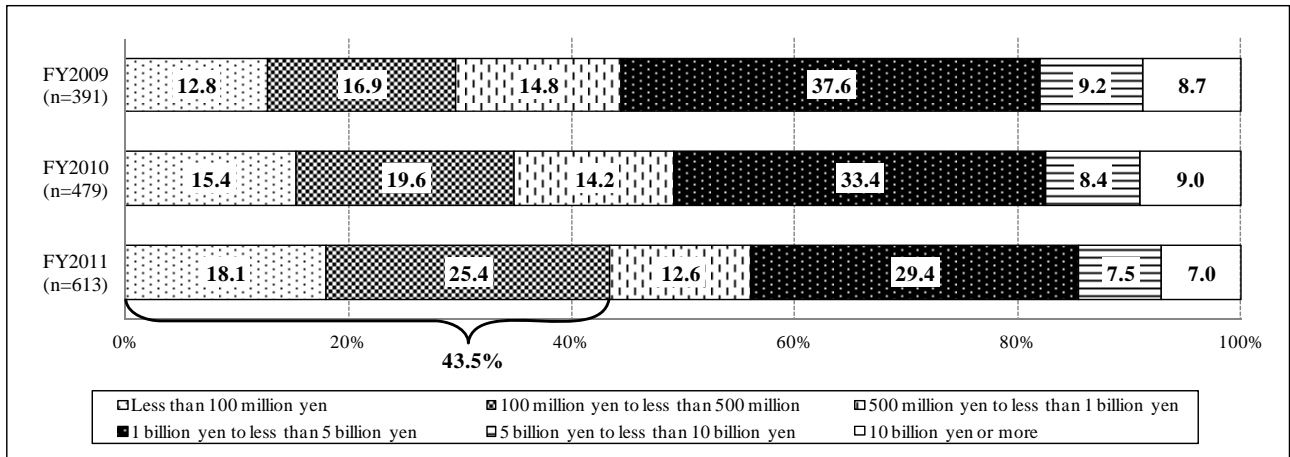
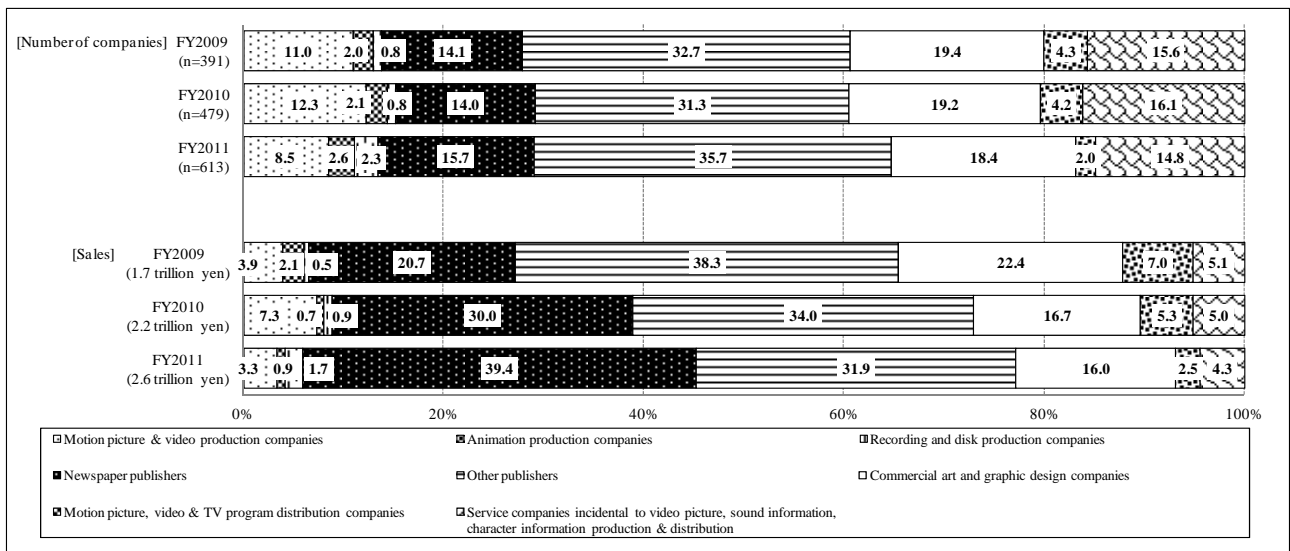


Fig. 6-3 Composition Ratios of the Number of Companies and Sales by Sector (Based on Companies' Main Business)



(Reference: Based on Companies' Activities)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)	FY2010	FY2011	Year-on-year (%)
Total	479	613	28.0	2,224,986	2,595,904	16.7	4,645.1	4,234.8	-8.8
Motion picture & video production service	87	86	-1.1	122,186	70,374	-42.4	1,404.4	818.3	-41.7
Animation production service	26	24	-7.7	38,423	33,705	-12.3	1,477.8	1,404.4	-5.0
Recording and disk production service	9	24	166.7	31,794	47,562	49.6	3,532.7	1,981.8	-43.9
Newspaper publishers	74	108	45.9	651,616	1,014,174	55.6	8,805.6	9,390.5	6.6
Other publishers	205	285	39.0	759,354	828,140	9.1	3,704.2	2,905.8	-21.6
Commercial art and graphic design service	140	157	12.1	384,125	412,311	7.3	2,743.8	2,626.2	-4.3
Motion picture, video & TV program distribution service	34	28	-17.6	112,962	66,288	-41.3	3,322.4	2,367.4	-28.7
Service incidental to video picture, sound information, character information production & distribution	125	144	15.2	124,526	123,350	-0.9	996.2	856.6	-14.0

(Note) The number of companies represents the number of companies that are operating relevant businesses even at the very minimum, and thus, the total and the sum of the breakdown do not match.

2. Business operation

- Regarding business operation, 59.1% of the companies (up 0.7 points) were already engaged in publication (magazines, newspapers, e-publishing, etc.), and 33.3% (down 8.5 points) in commercial message production, and commercial art and graphic design.
- Of the total number of companies, 35.9% (up 6.9 points) expressed their intention to start delivery to mobile devices (mobile phones, mobile AV equipment, etc.) within one year, and 23.1% (up 0.5 points) expressed their intention to start delivery through the Internet.

Fig.6-4 Business Operation (Already Doing It)
(high-ranking) (multiple answers allowed)

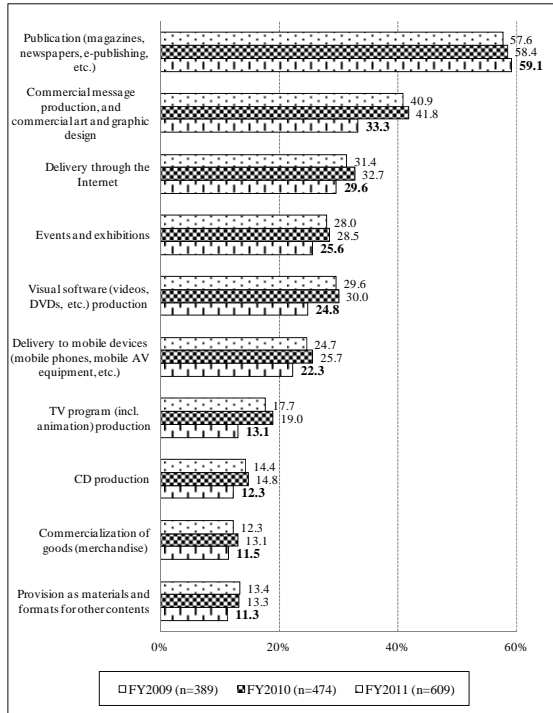
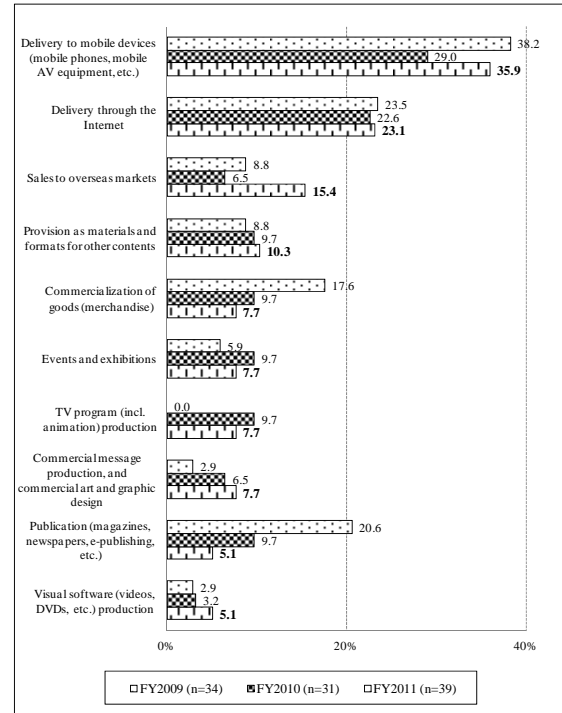


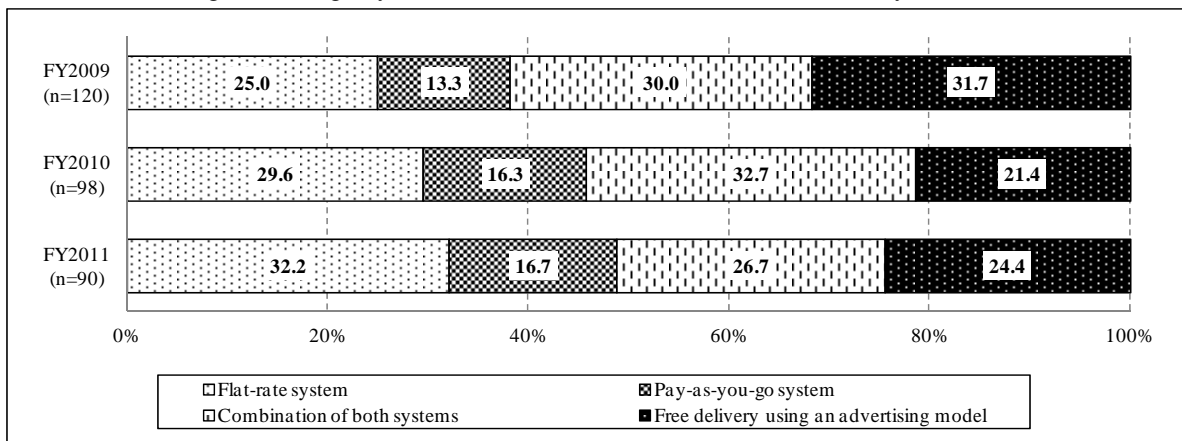
Fig.6-5 Business Operation (Plan to Start Within One Year) (high-ranking) (multiple answers allowed)



3. Charge system

- With regard to charge systems for the video picture and music delivery services, the flat-rate system was the most common at 32.2% (up 2.6 points), followed by a combination of a flat-rate system and a pay-as-you-go system at 26.7% (down 6.0 points).

Fig. 6-6 Charge Systems for the Video Picture and Music Delivery Services



4. Content production in the development and production section

- The number of content production per company was 118.4 pieces of contents (down 29.6%).
- Looking at the rights held concerning produced contents, 81.0% of the companies held the full right for the primary use, and 62.6% held the full right for the secondary use. In both cases, companies holding 100% of the rights were the largest in number.
- By major sector, the percentage of newspaper publishers that held the full right for the primary use was higher than other sectors (98.9%), while the percentage of motion picture & video production companies that held the full right for the secondary use was lower than other sectors (26.4%).

Fig. 6-7 Number of Companies Which Responded and Content Production Per Company

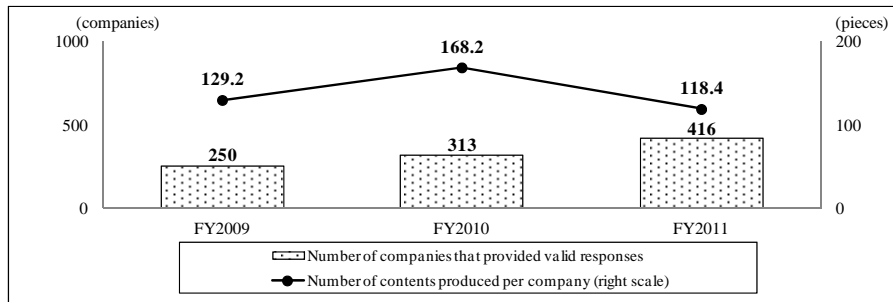


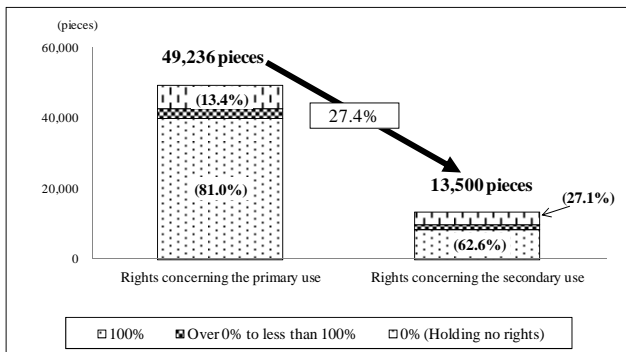
Fig. 6-8 Holding of Rights for Produced Contents

	Total				
	100%	50% or more to less than 100%	Over 0% to less than 50%	0% (Holding no rights)	
Rights concerning the primary use (pieces)	49,236	39,864	1,946	814	6,612
Composition ratios (%)	100.0	81.0	4.0	1.7	13.4
Rights concerning the secondary use (pieces)	13,500	8,451	1,088	308	3,653
Composition ratios (%)	100.0	62.6	8.1	2.3	27.1

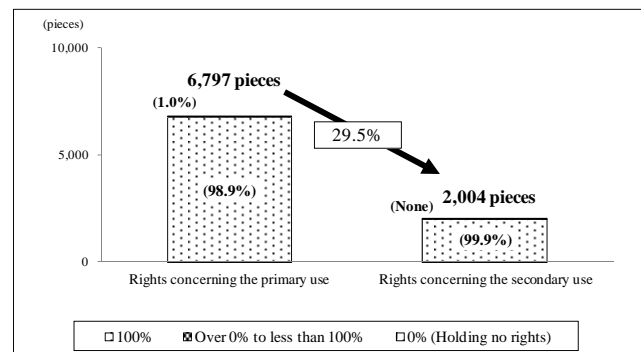
(Note) The "primary use" refers to the use in line with the original purpose of the contents (works), and the "secondary use" refers to the use by different media.

Fig. 6-9 Holding of Rights for Produced Contents (Major Sectors)

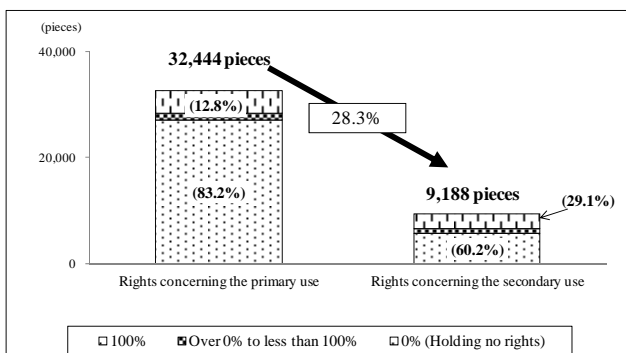
[Total]



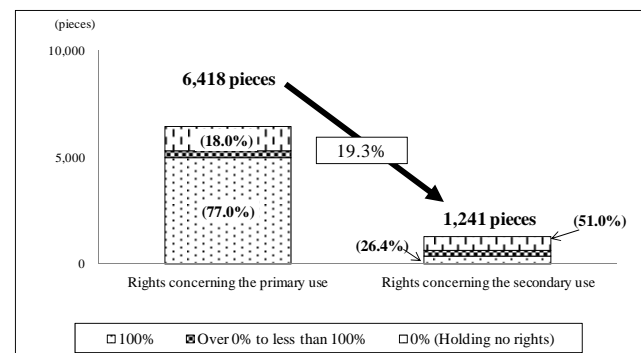
[Newspaper publishers]



[Other publishers]



[Motion picture & video production companies]



(Notes) Figures inside the boxes (%) represent the percentage of contents for which secondary use was performed. Figures inside the parentheses represent composition ratios in relation to the number of pieces of contents produced

5. Outsourcing in the development and production section

- The percentage of companies that outsourced work was 55.9% (up 0.3 points).
- The outsourcing cost per company was 546 million yen (down 21.5%).
- The numbers of outsourced contents was 18,991 pieces. Among the number of contents outsourced, sales-based payment was adopted in 5.8%.
- By major sector, the number of pieces of outsourced content by other publishers was 9,702, which was more than that of other sectors. Newspaper publisher sales-based payments represented 0.5%, which was less than that of other sectors.

Fig. 6-10 Percentages of Companies Implementing Outsourcing

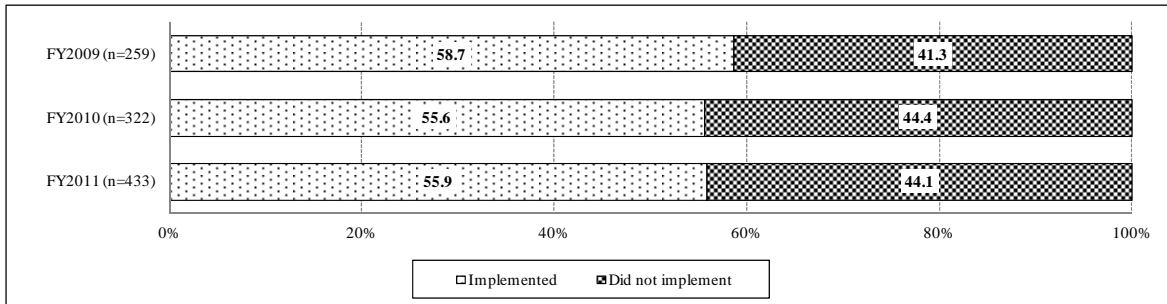


Fig. 6-11 Amount Outsourced Per Company (Major Sectors)

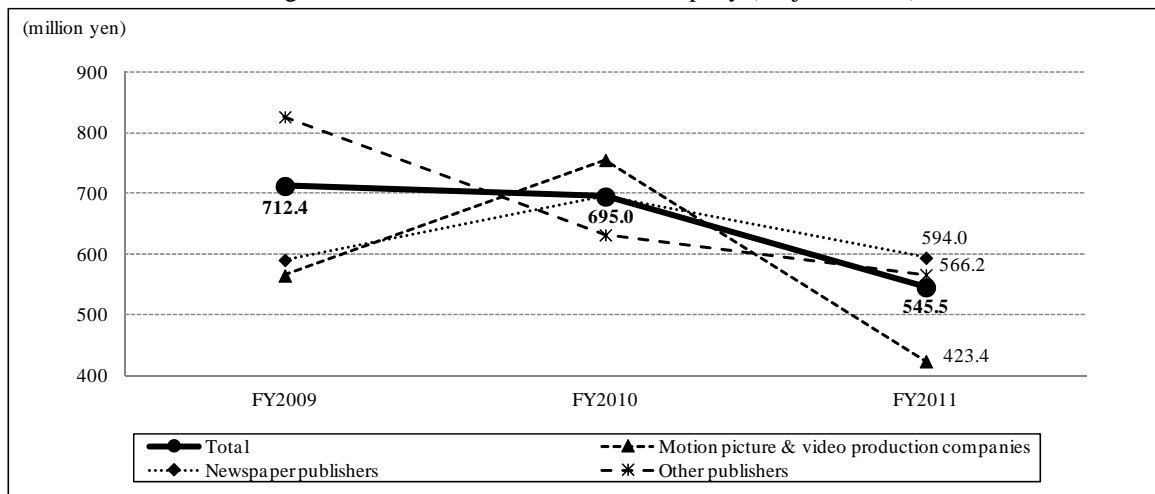
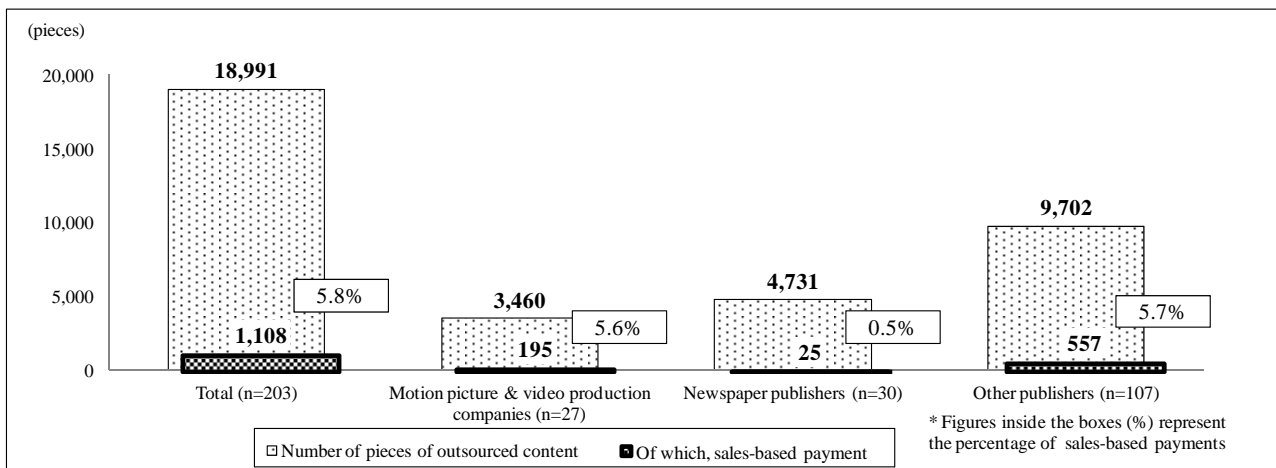


Fig. 6-12 Number of pieces of Outsourced Content and Number/Percentage of Sales-Based Payments (Major Sectors)



(Note) "Sales-based payment" refers to a payment method based on the sales and profits of the orderer.

6. Number of workers in the development and production section

- The number of regular workers per company was 95 (down 15.2%). The number of full-time workers was 70 (down 10.3%).
- Looking at the rate of those newly hired and that of resignees for full-time workers were, 2.6% (up 0.1 points) and 3.3% (down 0.2 points), respectively. The rate of contract workers newly hired was 23.0% (up 15.4 points), and that of those with cancelled contracts was 21.1% (down 1.2 points). The rate of contract cancellation for contract workers was high as compared to the rate of resignation of full-time workers.

Fig. 6-13 Number of Regular Workers per Company in the Development and Production Section (Major Sectors)

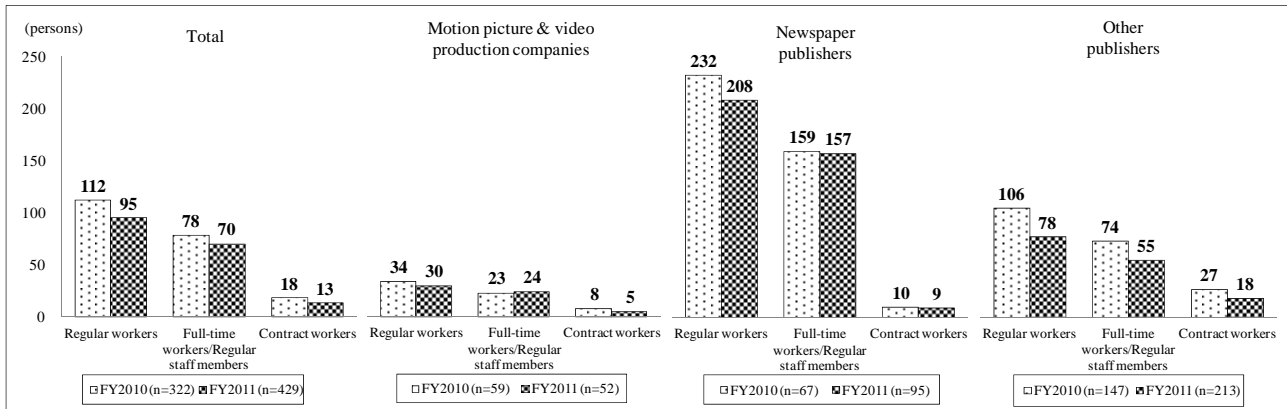
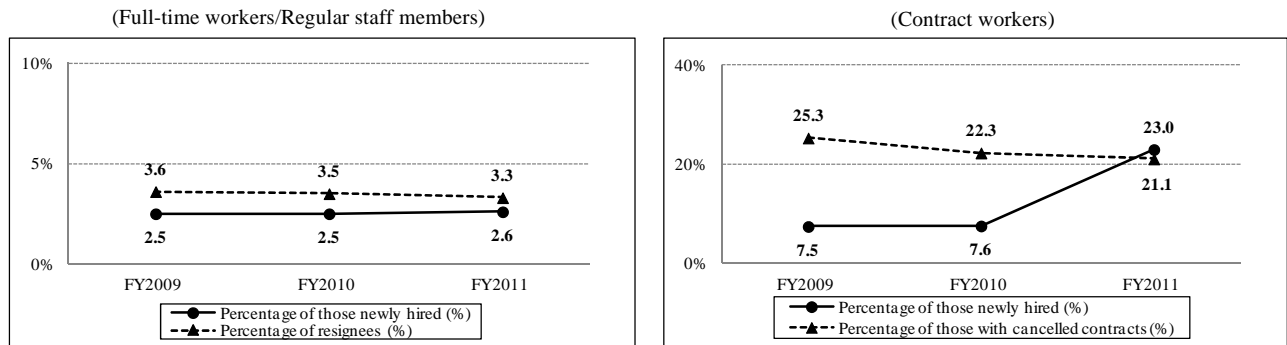


Fig. 6-14 New Hires and Resignees



(Notes) Percentage of those newly hired = Number of those newly hired / (Number of full-time workers + Number of resignees) × 100
 Percentage of resignees = Number of resignees / (Number of full-time workers + Number of resignees) × 100

(Notes) Percentage of those newly hired = Number of those newly hired / (Number of contract workers + Number of those with cancelled contracts) × 100
 Percentage of those with cancelled contracts = Number of those with cancelled contracts / (Number of contract workers + Number of those with cancelled contracts) × 100

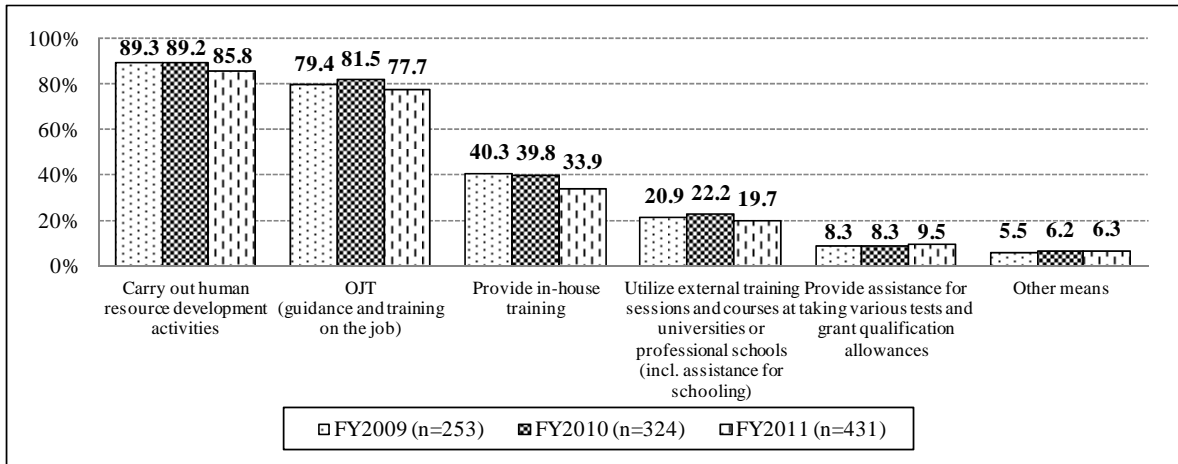
Fig. 6-15 Number of Workers in the Development and Production Section

	FY2009		FY2010		FY2011	
		Per company		Per company		Per company
Number of companies that provided valid responses (companies)	259	-	322	-	429	-
Number of regular workers (persons)	29,851	115	36,093	112	40,574	95
Full-time workers/Regular staff members	22,524	87	25,127	78	29,970	70
Part-timers	1,198	5	1,149	4	1,730	4
Workers transferred to other companies	583	2	1,111	3	1,428	3
Contract workers	5,257	20	5,832	18	5,370	13
Temporary or daily workers (persons)	263	1	91	0	212	0
Dispatched workers (persons)	720	3	1,320	4	1,357	3

7. Human resource development in the development and production section

- Companies that carried out human resource development activities accounted for 85.8% (down 3.4 points). Companies that provided OJT (guidance and training on the job) accounted for 77.7% (down 3.8 points).

Fig. 6-16 Percentage of Companies that Carried Out Human Resource Development Activities
(multiple answers allowed)





2012 Basic Survey on the Information and Communications Industry (I)

(Common Survey)

(As of March 31, 2012)

- ☆ This survey is a general statistical survey in accordance with the Statistics Act (2007, Act No. 53).
- ☆ Information in this survey form will be used only to compile statistics and **will not be used in any way that might bring advantage or disadvantage to the reporter.** Please provide accurate and true information.
- ☆ Please refer to the **Guide for Completing the Survey** and enter clearly using a black or blue ball-point pen. All figures must be entered in the units specified by the survey.
- ☆ Please provide information as of March 31, 2012, for this survey and **enter the settlement results for fiscal 2011. If this is not possible, enter results for the nearest settlement term.** If the settlement term has changed, please refer to the Guide for Completing the Survey.
- ☆ Please **submit this survey form by July 15, 2012.**

1 Company Profile

(1) Company name				Phone no. (Main line)			
(2) Address of company head office (location where actual head office functions are performed)	Zip code (—)	Prefecture	City	Ward	(Name of building)		
(3) Capital or investment amount (as of March 31, 2012)	0101	million yen	Enter the ratio of foreign capital to your company's overall capital.	Ratio of foreign capital (Enter up to the first decimal place)			
				0102			
(4) Form and year of company establishment	0103	Year of establishment (in four digits)	Circle the applicable number for the form of establishment, only if you are submitting the survey form for the first time 1. Newly established 2. Newly merged 3. Newly separated 4. Other				
(5) Organizational restructuring status after April 2011	0104	(i) Circle the applicable number regarding the organizational restructuring after April 2011. 1. Conducted ⇒ Enter (ii) 2. Not conducted ⇒ Go to (6)		(ii) Circle all the applicable numbers regarding the content of the organizational restructuring, only if your company was reorganized after April 2011 1. Merger 2. Spin-off 3. Selling out a part of businesses/assets to another company (business transfer) 4. Purchasing a part of businesses/assets from another company (business acceptance) 5. Other			
(6) Month of settlement	0105	Annual	(month)	Biannual	(month),	(month)	
(7) Consumption tax status (Check box if applicable)	0106	Tax excluded <input type="checkbox"/>	☆ In principle, please enter figures that include consumption tax. However, if it is difficult to provide tax-inclusive figures due to accounting reasons, check box and enter tax-exclusive figures.				

Full name of the person who completed the survey form			
Department and address of the person who will answer inquiries about the content of this form (person who completed the form)	Department name		
	Phone no. (Area code) - (Ext.)		
Contact address (enter only if different from the address of the head office given above)			
Remarks (enter if there is anything in particular that should be mentioned regarding the content of this form.)			

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2 Business Organization and Number of Workers

2012 Survey

(1) Number of establishments and regular workers by business organization

(As of the end of FY2011)

Classification			Number of establishments	Number of regular workers
Head office	Head office operation divisions	Survey and planning	0201	
		Information processing	0202	
		Research and development	0203	
		International operations	0204	
		Other (General administration, accounting, human resources, etc.)	0205	
	Total no. of head office operation divisions (A)		0206	
	On-site operation divisions	Information service	0207	
		Other (Divisions other than the above)	0208	
	Total no. of on-site operation divisions (B)		0209	
Total ① (A+B)			0210	
Establishments other than head office	Domestic	Information service	0211	
		Research institutes	0212	
		Other (Divisions other than the above)	0213	
	Overseas	Overseas affiliates, branches, representative offices, etc.	0214	
Total ②			0215	
Number of workers transferred to other companies, etc. ③			0216	
Grand total ①+②+③			0217	
Full-time workers			0218	
Part-timers			0219	
Part-timers (in terms of working hours)			0220	

(Note) For "Number of regular workers," enter the total number of paid directors and regularly employed persons (persons, regardless of their titles as full-time, part-time, temporary or contract workers, employed under a contract longer than one month, or persons employed for 18 days or more each month in the two months prior to the end of the financial year).

(Note) "Information service division (0207)" and "Information service establishments (0211)" refer to business divisions and establishments that are engaged in software business, information processing and provision services, Internet based services, film and video production, television program production, newspaper and publishing operations.

(Note) For "Number of establishments" for the head office, enter only the total number (0210). For "Number of regular workers," enter the number for each division.

(Note) For "Number of establishments," enter the number for the head office (0210) and for those other than the head office (0211-0215 and 0217).

(Note) For "Establishments other than the head office," enter the number of establishments and the number of regular workers for each establishment (including those overseas).

(Note) For "Number of workers transferred to other companies, etc. (0216)," enter the number of workers transferred to subsidiaries and affiliates, and whose salaries are paid mainly by your company.

(Note) For "Full-time workers (0218)," enter the number of regular workers generally referred to as full-time workers.

(Note 1) For "Part-timers (0219)," enter the number of regular workers whose scheduled daily working hours or the number of working days in a week are shorter than full-time workers.

(Note 2) For "Part-timers (in terms of working hours) (0220)," calculate in terms of the working hours of your company's full-time workers and enter the number rounded off to the nearest whole number.

(Note 1) "Temporary or daily workers (0221)" refer to persons who are employed for a period of up to one month, or those who are brought in on a daily basis.

(Note 2) "Dispatched workers (0222)" refer to workers who are employed by a worker dispatching business operator and are engaged in your company's operations under your company's supervision and command, based on a contract between your company and the worker dispatching business operator concerned, under the aforementioned employment relationship.

3 Parent Company, Subsidiary and Affiliate Status

2012 Survey

(1) Parent company's name, location, industry sector and voting rights ownership percentage

Parent company refers to the company that owns more than 50% of your company's voting rights.

Also includes cases where the company owns 50% or less, if it practically controls your company's management. (As of the end of FY2011)

(Note 1) If the parent company is located in Japan, enter the prefecture number of its location. If the parent company is located overseas, enter the country classification number and country name.
(Note 2) For the prefecture number, country classification number and industry classification number, refer to the "Classification Table for the Basic Survey on the Information and Communications Industry."

(Note 1) A pure holding company refers to a company whose purpose is not to conduct business activities but mainly to control multiple companies by owning shares in them. The company is engaged in drawing up management plans for the entire group.
(Note 2) A business holding company refers to a company that is engaged in business activities but also owns shares in multiple companies for the purpose of controlling those companies.
A mere parent-subsidiary relationship is not applicable.

Presence or absence of parent company	0300	Circle the applicable number regarding the presence or absence of the parent company. 1. Presence 2. Absence (Go to (2) Ownership of subsidiaries and affiliates)			
Company name					
Securities identification code	0301	Enter the securities identification code if the parent company is a listed company.			
Location	0302	Prefecture no.	Country classification no.	Country name	
Business structure and industry sector	Circle the applicable number regarding the parent company's business structure, and enter the industry sector and industry classification number.				
	0303	1. Pure holding company → Enter 990 for the industry classification number. There is no need to enter the industry sector. 2. Business holding company 3. Other			
	0304	Industry sector	Industry classification no.		
Voting rights owned by parent company	0305	Enter the percentage, to the first decimal place, of your company's voting rights owned by the parent company.			
Consolidated relationship with parent company	Circle the applicable number regarding the consolidated relationship between your company and the parent company.				
	0306	1. Consolidated subsidiary (Consolidated accounting by the parent company) 2. Non-consolidated subsidiary (Consolidated accounting by the parent company) 3. Consolidated accounting not by the parent company			

(2) Ownership of subsidiaries and affiliates

① Presence or absence of subsidiaries and affiliates

Circle the applicable number regarding the presence or absence of subsidiaries and affiliates.

0310 1. Presence 2. Absence (Go to (3) Increase or decrease in number of subsidiaries and affiliates)

② Ownership of subsidiaries and affiliates

(As of the end of FY2011)

Percentage of voting rights ownership	Industry classification no.	Number of subsidiaries and affiliates						
		Domestic	Overseas	Asia		Europe	North America	Other areas
				China (including Hong Kong)				
Subsidiaries	100% 0311							
	Less than 100% — More than 50% (Note 2) 0312							
Affiliates	50% or less — 20% or more (Note 3) 0313							

(Note 1) Voting rights includes partially granted voting rights.
(Note 2) A subsidiary refers to a company in which your company owns more than 50% of the voting rights. It includes a company in which the subsidiary, or your company and the subsidiary combined, own more than 50% of the voting rights. It also includes a company that your company practically controls, even if your company owns 50% or less of the voting rights.
(Note 3) An affiliate refers to a company in which your company owns no less than 20% but no more than 50% of the voting rights. It also refers to a company that your company can seriously affect, even if your company owns less than 20% but no less than 15% of the voting rights.
(Note 4) Enter the industry classification number in accordance with the classification of the "Classification Table for the Basic Survey on the Information and Communications Industry."
(Note 5) If your company owns subsidiaries and affiliates, enter also Question 4(2) "Investment in affiliates" on page 4.
(Note 6) Do not include dormant companies.
(Note 7) If more space is required, use the supplementary paper provided in the "Guide for Completing the Survey" and attach to the left margin.

(3) Increase or decrease in number of subsidiaries and affiliates

Enter the number by which subsidiaries and affiliates increased or decreased during the fiscal year in question.

(FY2011)

(FY2011)

Classification		Number by which companies increased			
		Domestic		Overseas	
		Subsidiaries	Affiliates	Subsidiaries	Affiliates
Total number during the fiscal year	0321				
Newly established	0322				
Spin-off	0323				
Acquisition	0324				
Other than above	0325				

Classification		Number by which companies decreased			
		Domestic		Overseas	
		Subsidiaries	Affiliates	Subsidiaries	Affiliates
Total number during the fiscal year	0326				
Closure	0327				
Integration	0328				
Sellout	0329				
Other than above	0330				

(Note 1) For definitions of subsidiaries and affiliates, see Notes 2 and 3 of (2).
(Note 2) "Spin-off (0323)" refers to cases where a company has separated a business or part of the organization and established it as a separate company (subsidiary or affiliate).
(Note 3) "Acquisition (0324)" refers to cases where voting rights have been acquired.
(Note 4) "Closure (0327)" refers to cases where a company has stopped a subsidiary's or an affiliate's business activities and has not kept them running.
(Note 5) "Integration (0328)" refers to cases of merger among subsidiaries and affiliates.
(Note 6) "Sellout (0329)" refers to cases where voting rights have been assigned to other companies.

4 Assets, Liabilities, Net Assets and Investment

2012 Survey

(1) Assets, liabilities and net assets

(As of the end of FY2011)

Accounting item		million yen				Accounting item		million yen				
Assets	Current assets	0401				Liabilities	Current liabilities	0411				
	Inventory asset	0402					Bills payable and accounts payable	0412				
	Fixed assets	0403					Short-term borrowing (financial institutions)	0413				
		Tangible fixed assets	0404					Short-term borrowing (other than financial institutions)	0414			
	Other than land	0405					Fixed liabilities	0415				
	Intangible fixed assets	0406					Corporate bonds (including convertible bonds)	0416				
		Software	0407					Long-term borrowing (financial institutions)	0417			
	Investment and other assets	0408					Long-term borrowing (other than financial institutions)	0418				
	Deferred assets	0409					Stockholders' equity	Capital	0419			
	Total assets	0410						Capital surplus	0420			
					Earned surplus	0421						
					Own stock	0422						
					Other	0423						
					Total liabilities and net assets	0424						

(Note) "Other (0423)" includes land revaluation balance, market value balance on financial products,

(2) Investment in affiliates

(As of the end of FY2011)

Classification		Domestic				Overseas			
		million yen				million yen			
Balance of investment and loans to affiliates	0431								
Balance of stock and capital	0432								
Long-term loans	0433								

(Note 1) If you have entered "3 Parent Company, Subsidiary and Affiliate Status" on page 3, enter "Balance of investment and loans to affiliates (0431 - 0433)."

(Note 2) An affiliate refers to a subsidiary, affiliated company or parent company.

(3) Fixed asset gain and loss

(FY2011)

Classification		million yen				Classification		million yen			
Acquisition value of tangible fixed assets this term	0441					Retirement cost of tangible fixed assets this term	0444				
Investment in information technology	0442					Decrease in intangible fixed assets this term	0445				
Acquisition value of intangible fixed assets this term	0443										

(4) Dividend status of surplus

(FY2011)

Classification		million yen			
Dividends (including interim dividends)	0451				

5 Business Performance

(1) Sales and expenses, etc.

(FY2011)

Accounting item		million yen			
Sales	0501				
Operating expenses	Cost of sales	0502			
	Sales and general administrative expenses	0503			
	Non-operating income	0504			
Non-operating profit and loss	Non-operating expenses	0505			
	Interest expenses, etc.	0506			
	Pretax profit (△ indicates a loss)	0507			
Current net profit (△ indicates a loss)	0508				

Enter the breakdown of "Sales (0501)."
"Sales (0501)" should equal the sum of the following:
① Company's income from the information and communications business
② Other business income

(2) Breakdown of expenses

(FY2011)

Accounting item		million yen			
Advertising expenses	0511				
Packaging and transportation expenses	0512				
Depreciation costs	0513				
Total amount of payroll (incl. bonus payments)	0514				
Welfare expenses (incl. retirement benefits)	0515				
Real estate and movable property rental expenses	0516				
Tax and public charges	0517				

(Note) For each expense accounting item (0511-0517), enter the total of expenses that fall under "Sales and general administrative expenses (0503)" and those that fall under "Cost of sales (0502)."

(3) Information processing and communication expenses

(FY2011)

Accounting item		million yen			
Information processing and communication expenses	0520				

(Note) Information processing and communication expenses (0520) = "Information processing expenses" + "Communication expenses"

- Total amount of information processing expenses at departments specializing in computer-based information processing and data communications, and communication expenses including telephone, mail, etc.
- Computer-based information communication expenses include installation costs, lease and rental fees, maintenance costs, connection fees, software commission and purchasing expenses, data entry commission expenses, calculation commission expenses (including machine time rent), online service fees, etc.

(4) Lease payments for equipment in use on lease contracts

(FY2011)

Accounting item		million yen			
Lease payments	0530				

(Note) Enter the amount paid based on a lease contract during the fiscal year in question. A lease contract refers to a contract regarding the possession and use of a specific asset over the long term, and does not include land and building leases, short-term rentals, charters, etc.

Companies with capital of 500 million yen or more, submitting the Ministry of Finance's Financial Statements Statistics of Corporations by Industry annual survey form, do not need to enter the colored survey items (0401-0424, 0451, 0502-0508, and 0513-0517).

6 Business Conditions

2012 Survey

(1) Sales conditions (FY2011)

Classification		Transaction value					Affiliates					
		million yen					million yen					
Sales	0601											
Purchase of goods	0602											

(Note 1) An affiliate refers to a subsidiary, affiliated company or parent company.

(Note 2) The transaction value of "Sales (0601)" should equal the figure in 5 (1) "Sales (0501)" on page 4.

(Note 3) For the transaction value of "Purchases of goods (0602)," enter the total of domestic and overseas product purchases, raw material purchases, etc. of the 5 (1) "Cost of sales (0502)" on page 4. Do not include service transactions (transportation, communication, construction, insurance, finance, information, software, culture, entertainment and other services, royalty payments, etc.).

(2) International transactions regarding services other than goods (FY2011)

Classification		Transaction value					Affiliates					
		million yen					million yen					
Amount received from overseas	0603											
Payment overseas	0604											

(Note 1) For the definition of affiliates, see Note 1 of (1).

(Note 2) Services other than goods refer to transportation, communication, construction, insurance, finance, information, software, culture, entertainment and other services, royalty payments, etc.

(Note 3) Only enter the international transactions recorded on the income statement.

7 Status of Businesses Outsourcing

(1) Circle all applicable numbers regarding your company's implementation status of outsourcing.

1. Implemented manufacturing outsourcing. (1. In Japan 2. Overseas) ⇒ Enter (2)
2. Implemented outsourcing other than manufacturing. ⇒ Enter (3) and (4)
3. Did not implement outsourcing. ⇒ Go to 8

0701

(2) Cost of manufacturing outsourcing at your company (FY2011)

Classification		Transaction value					Affiliates					
		million yen					million yen					
Cost of manufacturing outsourcing	0702											
Overseas	0703											

(Note 1) For the definition of affiliates, see Note 1 of 6 (1).

(Note 2) For "Cost of manufacturing outsourcing (0702)," enter the total cost of manufacturing outsourcing made up of the subcontract cost, agent service fee, etc. (including similar expenses) recorded in the operating expenses (including "Cost of sales (0502)").

(3) Circle the applicable number of 1-12 regarding outsourcing status other than manufacturing, and then circle all applicable numbers regarding the outsourcees whether in Japan or overseas (excluding outsourcing of construction work).

1. Information-processing-related (1. In Japan 2. Overseas)
2. Research and marketing (1. In Japan 2. Overseas)
3. Design and product planning (1. In Japan 2. Overseas)
4. General clerical work (1. In Japan 2. Overseas)
5. Employee-welfare-related, such as benefits (1. In Japan 2. Overseas)
6. Special areas, such as tax practice and accounting (1. In Japan 2. Overseas)
7. Employee education, such as in-house training (1. In Japan 2. Overseas)
8. External affairs, such as reception, guide, and secretarial work (1. In Japan 2. Overseas)
9. Logistic-related, such as transportation, delivery, and storage (1. In Japan 2. Overseas)
10. Environment-and-anticrime-related, such as cleaning, security, and maintenance (1. In Japan 2. Overseas)
11. Research-and-development-related areas (1. In Japan 2. Overseas)
12. Others (1. In Japan 2. Overseas)

0704

Of which, enter information regarding those that are recorded as subcontract cost, agent service

(4) Subcontract cost, agent service fee, etc. other than manufacturing outsourcing at your company (FY2011)

Classification		Transaction value					Affiliates					
		million yen					million yen					
Subcontract cost, agent service fee, etc. other than manufacturing outsourcing	0705											
Overseas	0706											

(Note 1) For the definition of affiliates, see Note 1 of 6 (1).

(Note 2) For subcontract cost, agent service fee, etc. other than manufacturing outsourcing, enter the cost without manufacturing outsourcing of the subcontract cost, agent service fee, etc. (including similar expenses) recorded in the operating expenses (including "Cost of sales (0502)").

8 Research and Development and Capacity Development

2012 Survey

(1) Circle all the applicable numbers regarding your company's research and development efforts (including commissioned and consigned).

- 0801 1. Conducted research and development (including commissioned and consigned) in Japan. ⇒ Enter (2) and (3)
 0801 2. Conducted research and development (including commissioned and consigned) overseas. ⇒ Enter (2) and (3)
 0801 3. Did not conduct research and development (including commissioned and consigned). ⇒ Go to (3)

(2) Research and development expenses and investment

(FY2011)

Classification		Research and development expenses and investment						
		Commissioned and consigned with affiliates						
		Domestic			Overseas			
		million yen			million yen			
Own-company research and development	0802							
Commissioned research and development expenses	0803							
Consigned research expenses	0804							
Acquisition value of research and development-related tangible fixed assets this term	0805							

(Note 1) An affiliate refers to a subsidiary, affiliated company or parent company.

(Note 2) In "Commissioned research and development expenses (0803)" and "Consigned research expenses (0804)," include research and development expenses involved in joint research with universities and other companies.

(Note) Companies with capital of one billion yen or more, and submitting the Ministry of Internal Affairs and Communications' Scientific and Technological

(Note) For "Acquisition value of research and development-related tangible fixed assets this term (0805)," enter the value concerning research and development of 4 (3) "Acquisition value of tangible fixed assets this term (0441)" on page 4.

(3) Capacity development expenses

(FY2011)

Classification		million yen			
Capacity development expenses	0806				

(Note) In "Capacity development expenses (0806)," include instructor costs, educational material costs, outside facility charges, training course expenses and outsourcing costs, expenses for dispatch to and study at overseas universities, and tuition aids for those who study at overseas universities, graduate schools, etc. at their own expenses, etc.

9 Technology Ownership and Transaction

(1) Ownership and usage of patents etc.

(As of the end of FY2011)

Content		Number of owned cases	Number of cases in use	
				Number of self-developed cases
Patent	0901			
Utility model right	0902			
Design right	0903			

(Note) In "Number of cases in use," include cases licensed to other companies.

(2) Technology transaction

① Amount received

(FY2011)

Content			Amount received				Affiliates			
			million yen				million yen			
Patent	Domestic	0911								
	Overseas	0912								
Utility model right	Domestic	0913								
	Overseas	0914								
Design right	Domestic	0915								
	Overseas	0916								
Copyright	Domestic	0917								
	Overseas	0918								
Software	Domestic	0919								
	Overseas	0920								
Other	Domestic	0921								
	Overseas	0922								

(Note 1) An affiliate refers to a subsidiary, affiliated company or parent company.

(Note 2) For both "Amount received" and "Payment," enter the values only if your company received or provided technology among companies in Japan or overseas during FY2009, regardless of whether the right is new or continued. In addition to your company's "Amount received" and "Payment," enter the "Amount received" and "Payment" among the affiliates.

(Note 3) "Software" refers to computer software.

② Payment

(FY2011)

Content			Payment				Affiliates			
			million yen				million yen			
Patent	Domestic	0923								
	Overseas	0924								
Utility model right	Domestic	0925								
	Overseas	0926								
Design right	Domestic	0927								
	Overseas	0928								
Copyright	Domestic	0929								
	Overseas	0930								
Software	Domestic	0931								
	Overseas	0932								
Other	Domestic	0933								
	Overseas	0934								

10 Direction of Corporate Management (As of the fiscal year end)

(1) Number of directors

Enter the number of directors in your company.

In-house directors	External directors	Affiliates

(Note 1) For the definition of affiliates, see Note 1 of 9 (2).

(Note 2) With regard to employing stock options, circle 1 if your company gives them to any directors or employees.

(2) Does your company adopt a "company with committees" system? Circle the applicable number.

 1. Yes 2. No

(3) Circle the applicable number regarding the stock option system.

 Does your company employ stock options? 1. Yes 2. No



2012 Basic Survey on the Information and Communications Industry (II)

(Telecommunications and Broadcasting)

(As of March 31, 2012)

- ☆ This survey is a general statistical survey in accordance with the Statistics Act (2007, Act No. 53).
- ☆ Information in this survey form will be used only to compile statistics and **will not be used in any way that might bring advantage or disadvantage to the reporter**. Please provide accurate and true information.
- ☆ Please refer to the **Guide for Completing the Survey** and enter clearly using a black or blue ball-point pen. All figures must be entered in the units specified by the survey.
- ☆ Please provide information as of March 31, 2012, for this survey and **enter the settlement results for fiscal 2011. If this is not possible, enter results for the nearest settlement term. If the settlement term has changed, please refer to the Guide for Completing the Survey.**
- ☆ Please **submit this survey form by July 15, 2012.**

1 Company Profile

(1) Company name		Phone no. (Main line)
(2) Address of company head office (location where actual head office functions are performed)	Zip code (—) Prefecture City Ward	(Name of building)

Full name of the person who completed the survey form		
Department and address of the person who will answer inquiries about the content of this form (person who completed the form)	Department name	
	Phone no. (Area code) - (Ext.)	Contact address (enter only if different from the address of the head office given above)
Remarks (enter anything in particular that should be mentioned regarding the content of this form.)		

2 Business Performance

Numbers are circled for businesses that your company is supposed to be engaged in, based on various directories.
If the number for a business that your company is not engaged in is circled, cross out the number.

1 Telecommunications	2 Broadcasting	3 Cable television broadcasting
-------------------------	-------------------	------------------------------------

3 Financial Status

(1) Fund procurement and fund management

Enter the status of procurement and management of long-term funds, on the basis of the net increase or decrease by category (see "Guide for Completing the Survey for 2012 Basic Survey on the Information and Communications Industry (II) (Telecommunications and Broadcasting)").

<On the whole-company basis>

Category		FY2011 Performance						FY2012 Forecast					
		million yen						million yen					
Long-term fund management	Funds for acquisition and capital investment (a)												
	Investment and loan (b)												
	Transfer to short-term funds (c)												
Total (a+b+c = d+e+f+g+h)													
Long-term fund procurement	Shares (d)												
	Bonds (e)												
	By the securitization of assets (f)												
	Borrowing (g)												
	From public-sector financial institutions												
	From private-sector financial institutions												
	Internal funds (h)												
Depreciation													

(Note 1) The net increase or decrease for long-term fund management refers to the amount that remains after subtracting the recovery from the amount of investment and loans, and that for long-term fund procurement refers to the amount that remains after subtracting the redemption from the amount of bond issuance and borrowing. Therefore, when the recovery is in excess of the amount of investment and loans or the redemption is in excess of the amount of company bonds and borrowing, the amount of fund management or fund procurement will be negative. In such cases, enter "▲" at the head of the negative amount.

(Note 2) The total of "Long-term fund management" should equal the total of "Long-term fund procurement."

(Note 3) For "Transfer to short-term funds," enter the amount of long-term funds allocated for short-term funds. Conversely, when short-term funds have been allocated for long-term funds, the amount will be negative. In such cases, enter "▲" at the head of the negative amount. This category can be used for adjusting amounts so as to equalize the total of fund management and the total of fund procurement.

(Note 4) Even if the details of the borrowing are not yet determined, enter the total amount when possible.

(2) Sales

Enter the breakdown of sales of services or income from the business that your company is engaged in, out of the telecommunications, broadcasting, and cable television broadcasting businesses.

When your company is engaged in multiple businesses, provide data for each business separately.

① Sales by service for the telecommunications business

Classification		million yen						
1	Fixed voice transmission (Domestic)							
	IP phone service							
2	Fixed voice transmission (International)							
	IP phone service							
3	Fixed data transmission							
	ISP, ADSL, and other Internet access							
	IP-VPN							
	Wide Area Ethernet							
4	Mobile voice transmission							
5	Mobile data transmission							
6	PHS voice transmission							
7	PHS data transmission							
8	Radio paging							
9	Private							
	International							
10	Telegram							
11	IDC (Internet Data Center)							
12	Other telecommunication services ()							
13	Total for FY2011							

(Note 1) For "Other telecommunications services," enter specific service names in the parenthesis.

		million yen						
Total forecast sales in the telecommunications business for FY2012								

② Sales by service for the broadcasting business

Classification		million yen						
1	Terrestrial broadcasting (Television)							
2	Terrestrial broadcasting (Radio)							
3	Terrestrial broadcasting (Text and data)							
4	Satellite broadcasting (BS)							
5	Satellite broadcasting (110 east longitude CS)							
6	Satellite broadcasting (Other CS)							
7	Other broadcasting services ()							
8	Total for FY2011							

(Note) For "Other broadcasting services," enter specific service names in the parentheses.

		million yen						
Total forecast sales in the broadcasting business for FY2012								

③ Sales by service for the cable television broadcasting business

Classification		million yen					
1	Basic services						
2	Pay services						
3	Revenue from IPTV services out of the total of basic services or pay services						
4	Rebroadcasting for those with visual or auditory difficulties						
5	Other cable television broadcasting services ()						
6	Total for FY2011						

(Note 1) "Revenue from IPTV services" refers to revenue from services to deliver images using the Internet, such as video on demand (VOD), download, and IP multicast broadcasting.

(Note 2) For "Other cable television broadcasting services," enter specific service names in the parentheses.

million yen					
Total forecast sales in the cable television broadcasting business for FY2012					

(3) Operating expenses

Enter the following items regarding operating expenses for the business that your company is engaged in, out of the telecommunications, broadcasting, and cable television broadcasting businesses.

When your company is engaged in multiple businesses, provide data for each business separately.

① Telecommunication business

<FY2011 >

Category	million yen					
Connection fees						

(Note) "Connection fees" include fees for network use, facility use, network modification, and maintenance commission, as well as fees for connection services that your company pays to service operators as compensation for using network facilities.

② Broadcasting business

<FY2011 >

Category	million yen					
Network expenses						
Program production expenses						
Program purchase expenses						
Subtotal						

(Note 1) For "Network expenses," enter the radio wave fees to pay for the use of key station networks.

(Note 2) For "Program purchase expenses," enter the expenses required for purchasing visual and audio software or for acquiring the right to use such software as broadcasting programs from outside.

③ Cable television broadcasting business

<FY2011 >

Category	million yen					
Program purchase expenses						
Program production expenses						
Subtotal						

(Note) For "Program purchase expenses," enter the expenses required for purchasing visual and audio software or for acquiring the right to use such software as broadcasting programs from outside.

4 Amount of Acquisition and Capital Investment

Enter the actual amount of capital investment and the forecast of capital investment (the acquisition value before depreciation of fixed assets (including the construction in progress account) during the period in question) for the business that your company is engaged in, out of the telecommunications, broadcasting, and cable television broadcasting businesses.

When your company is engaged in multiple businesses, provide data for each business separately.

① Telecommunication business

Category	FY2011 Performance					FY2012 Forecast				
	million yen					million yen				
Amount of acquisition and capital investment										
Software										

(Note 1) Enter the amount (on a construction basis) only for the telecommunications business.

(Note 2) Please be careful not to redundantly calculate a construction in progress account transferred to the real account.

(Note 3) For software expenses, enter the amount only capitalized as intangible fixed assets.

② Broadcasting business

Category	FY2011 Performance					FY2012 Forecast				
	million yen					million yen				
Amount of acquisition and capital investment										
Software										

(Note 1) Enter the amount (on a construction basis) only for the broadcasting business.

(Note 2) Please be careful not to redundantly calculate a construction in progress account transferred to the real account.

(Note 3) For software expenses, enter the amount only capitalized as intangible fixed assets.

③ Cable television broadcasting business

Category	FY2011 Performance					FY2012 Forecast				
	million yen					million yen				
Amount of acquisition and capital investment										
Software										

(Note 1) Enter the amount (on a construction basis) only for the cable television broadcasting business.

(Note 2) Please be careful not to redundantly calculate a construction in progress account transferred to the real account.

(Note 3) For software expenses, enter the amount only capitalized as intangible fixed assets.

5 Workers

Enter the number of workers for the following businesses that your company is engaged in.

< As of the end of FY2011 >

(persons)

Classification	Regular workers (excl. temporary or daily workers)	Full-time workers (excl. workers transferred to other companies)	Part-timers	Workers transferred to other companies	Temporary or daily workers	Dispatched workers
Broadcasting business						
Cable television broadcasting business						

(Note 1) For "Regular workers," enter the total number of paid directors and regularly employed people (people, regardless of their titles as full-time, part-time, temporary or contract workers, who are employed under a contract longer than one month, or people employed for 18 days or more each month in the two months prior to the end of the financial year).

(Note 2) For "Full-time workers," enter the number of regular workers generally referred to as full-time workers.

(Note 3) For "Part-timers," enter the number of regular workers whose scheduled daily working hours or number of working days in a week are shorter than full-time workers.

(Note 4) For "Workers transferred to other companies, etc.," enter the number of workers transferred to subsidiaries and affiliates, and whose salaries are paid mainly by your company.

(Note 5) "Temporary or daily workers" refer to people who are employed for a period of up to one month, or those who are brought in on a daily basis.

(Note 6) "Dispatched workers" refer to workers who are employed by a worker-dispatching business operator and are engaged in your company's operations under your company's supervision and command, based on a contract between your company and the worker-dispatching business operator concerned, under the aforementioned employment relationship.

6 Status of Businesses Outsourcing

- (1) Circle all applicable numbers regarding your company's implementation status of outsourcing for your telecommunications, broadcasting, or cable television broadcasting business.

When your company is engaged in multiple businesses, provide data for each business separately.

① Telecommunications business

1. Implemented outsourcing in FY2011 ⇒ Enter (2)
 2. Did not implement outsourcing ⇒ Go to 7

② Broadcasting business

1. Implemented outsourcing in FY2011 ⇒ Enter (2)
 2. Did not implement outsourcing ⇒ Go to 7

③ Cable television broadcasting business

1. Implemented outsourcing in FY2011 ⇒ Enter (2)
 2. Did not implement outsourcing ⇒ Go to 7

- (2) Enter your company's outsourcing cost for your telecommunications, broadcasting, or cable television broadcasting business.
 When your company is engaged in multiple businesses, provide data for each business separately.

① Telecommunications business

<FY2011 >

Category	Outsourcing cost				Affiliates			
	million yen				million yen			
Outsourcing for the telecommunications business								
Overseas								

(Note) An affiliate refers to a subsidiary, affiliated company or parent company.

② Broadcasting business

<FY2011 >

Category	Outsourcing cost				Affiliates			
	million yen				million yen			
Outsourcing for the broadcasting business								
Overseas								

(Note) An affiliate refers to a subsidiary, affiliated company or parent company.

③ Cable television broadcasting business

<FY2011>

Category	Outsourcing cost		Affiliates	
	million yen		million yen	
Outsourcing for the cable television broadcasting business				
Overseas				

(Note) An affiliate refers to a subsidiary, affiliated company or parent company.

7 Business Operation

Circle all applicable numbers regarding your company's business operation policy for your telecommunications, broadcasting, or cable television broadcasting business. When your company is engaged in multiple businesses, provide data for each business separately.

① Telecommunications business

a. Is your company now providing services overseas? What are your future plans?

1. We are providing services overseas and are going to expand the business.
2. We are providing services overseas and are going to maintain the status quo.
3. We are providing services overseas but are going to downsize the business (incl. withdrawal).
4. We are not providing services overseas, but are going to start doing so.
5. We are not providing services overseas, but are now considering doing so.
6. We are not providing services overseas, and have no plans to do so.

b. Is your company now outsourcing jobs overseas? What are your future plans?

1. We are outsourcing jobs overseas and are going to expand the business.
2. We are outsourcing jobs overseas and are going to maintain the status quo.
3. We are outsourcing jobs overseas but are going to downsize the business (incl. withdrawal).
4. We are not outsourcing jobs overseas, but are going to start doing so.
5. We are not outsourcing jobs overseas, but are now considering doing so.
6. We are not outsourcing jobs overseas, and have no plans to do so.

② Broadcasting business

a. Is your company now providing services overseas? What are your future plans?

1. We are providing services overseas and are going to expand the business.
2. We are providing services overseas and are going to maintain the status quo.
3. We are providing services overseas but are going to downsize the business (incl. withdrawal).
4. We are not providing services overseas, but are going to start doing so.
5. We are not providing services overseas, but are now considering doing so.
6. We are not providing services overseas, and have no plans to do so.

b. Is your company now outsourcing jobs overseas? What are your future plans?

1. We are outsourcing jobs overseas and are going to expand the business.
2. We are outsourcing jobs overseas and are going to maintain the status quo.
3. We are outsourcing jobs overseas but are going to downsize the business (incl. withdrawal).
4. We are not outsourcing jobs overseas, but are going to start doing so.
5. We are not outsourcing jobs overseas, but are now considering doing so.
6. We are not outsourcing jobs overseas, and have no plans to do so.

③ Cable television broadcasting business

a. Is your company now providing services overseas? What are your future plans?

1. We are providing services overseas and are going to expand the business.
2. We are providing services overseas and are going to maintain the status quo.
3. We are providing services overseas but are going to downsize the business (incl. withdrawal).
4. We are not providing services overseas, but are going to start doing so.
5. We are not providing services overseas, but are now considering doing so.
6. We are not providing services overseas, and have no plans to do so.

b. Is your company now outsourcing jobs overseas? What are your future plans?

1. We are outsourcing jobs overseas and are going to expand the business.
2. We are outsourcing jobs overseas and are going to maintain the status quo.
3. We are outsourcing jobs overseas but are going to downsize the business (incl. withdrawal).
4. We are not outsourcing jobs overseas, but are going to start doing so.
5. We are not outsourcing jobs overseas, but are now considering doing so.
6. We are not outsourcing jobs overseas, and have no plans to do so.

8 Future Business Operation

Circle all applicable numbers regarding new businesses that your company intends to start within one year, in relation to the current businesses. (Multiple answers allowed)
For "Other," enter specific business names.

1	DSL services	23	Information network security services
2	FTTH services	24	Charging/settlement agent services
3	Wireless Internet access	25	Server management consignment
4	IDC (Internet Data Center)	26	Other Internet based services
5	ISP	27	Software services
6	Terrestrial broadcasting	28	Data processing and information services
7	Satellite communications	29	Production of digital contents other than websites
8	International communications	30	Provision of digital contents other than websites
9	Satellite broadcasting (BS)	31	IT personnel dispatch services
10	Satellite broadcasting (110 east longitude CS)	32	Consulting
11	Satellite broadcasting (Other CS)	33	Internet mail order services
12	Cable television broadcasting	34	Internet advertising
13	Cable Internet	35	Information and telecommunications facility construction
14	IPTV services (Internet video delivery)	36	Information and telecommunications equipment sales
15	Web information search services	37	Equipment maintenance, repair, and management
16	Operation of an Internet shopping site	38	Other (Enter business names) []
17	Operation of an Internet auction site		
18	Electronic bulletin board services, blog services, and SNS operation		
19	Cloud computing services		
20	Web contents delivery		
21	IPTV services (Internet video delivery)		
22	Electronic authentication services	39	No future business operation planned



General Statistics

2012 Basic Survey on the Information and Communications Industry (III)

(Broadcast Program Production)

(As of March 31, 2012)

- ☆ This survey is a general statistical survey in accordance with the Statistics Act (2007, Act No. 53).
- ☆ Information in this survey form will be used only to compile statistics and **will not be used in any way that might bring advantage or disadvantage to the reporter**. Please provide accurate and true information.
- ☆ Please refer to the **Guide for Completing the Survey** and enter clearly using a black or blue ball-point pen. All figures must be entered in the units specified by the survey.
- ☆ Please provide information as of March 31, 2012, for this survey and **enter the settlement results for fiscal 2011. If this is not possible, enter results for the nearest settlement term. If the settlement term has changed, please refer to the Guide for Completing the Survey.**
- ☆ Please **submit this survey form by July 15, 2012.**

1 Company Profile

(1) Company name		Phone no. (Main line)
(2) Address of company head office (location where actual head office functions are performed)	Zip code (—) Prefecture City Ward (Name of building)	

Full name of the person who completed the survey form	
Department and address of the person who will answer inquiries about the content of this form (person who completed the form)	Department name
	Phone no. (Area code) - (Ext.) Contact address (enter only if different from the address of the head office given above)
Remarks (enter if there is anything in particular that should be mentioned regarding the content of this form.)	

2 Business Performance

(1) Broadcast media for programs that your company produces

Circle all applicable numbers regarding broadcast media for programs that your company produces. (Multiple answers allowed)

1	TV broadcasting	2	Radio broadcasting	3	Data broadcasting
---	-----------------	---	--------------------	---	-------------------

(Note 1) "TV broadcasting" includes TV programs by satellite broadcasting, as well as those by terrestrial broadcasting.

(Note 2) "Radio broadcasting" includes intermediate- and short-wave programs and FM programs by terrestrial broadcasting, and other radio programs by satellite broadcasting.

(Note 3) "Data broadcasting" includes data programs by terrestrial broadcasting, character multiplex broadcasting, data multiplex broadcasting, and data programs by satellite broadcasting.

(Note 4) Including commercial messages.

(Note 5) Satellite broadcasting referred to in the notes above includes BS, 110 east longitude CS, and other CS broadcasting.

(2) Types of programs that your company produces

Circle all applicable numbers regarding types of programs that your company produces. (Multiple answers allowed)

1	Drama	6	Sports	11	Music
2	Variety show	7	News	12	Commercial message
3	Animation	8	Educational program	13	Other []
4	Documentary	9	Information program (incl. publicity)		
5	Tabloid show	10	TV shopping		

(3) Contents of the program production business

Circle all applicable numbers regarding the contents of your company's program production business. (Multiple answers allowed)

1	Planning	5	Sound production, recording, and multi audio (MA) work
2	Shooting	6	Studio leasing
3	Computer graphics production	7	Staff dispatch
4	Editing	8	Other ()

(4) Other business details

Circle all applicable numbers regarding your company's business details other than those for producing programs. (Multiple answers allowed)

1	Film production	4	DVD production
2	Program production other than those for broadcasting (OVA and instructional videos)	5	Website production
3	Company PR video production	6	Other ()

3 Sales

(1) Sales from the program production business

Enter the sales from your company's program production business.

Classification	FY2011 Performance				FY2012 Forecast			
	million yen				million yen			
Sales from the program production business								

(2) Sales by content of the program production business

Enter the percentage of sales (FY2011 performance) by content of your company's program production business.

TV program production		Radio program production		Data program production		Total
Planning & production	Technical work	Planning & production	Technical work	Planning & production	Technical work	
%	%	%	%	%	%	100 %

(Note 1) The sum of the percentages entered in columns for "TV program production," "Radio program production," and "Data program production" should be 100%.

(Note 2) For "Planning & production," enter the percentage of sales from the overall program production-related work, such as the planning of programs, progress management of program production and creation, and budget control.

(Note 3) For "Technical work," enter the percentage of sales from technical work while producing programs, such as shooting, editing of VTR, and leasing of studios, as well as lighting and sound work.

(3) Sales from other businesses

Enter the percentage of sales (FY2011 performance) by content of your company's businesses other than the program production business.

Film production	Program production other than those for broadcasting (OVA, etc.)	Company PR video production	DVD production	Website production	Other	Total
%	%	%	%	%	%	100 %

(Note) The sum of the percentages entered in the columns for "Film production," "Program production other than those for broadcasting (OVA, etc.)," "Company PR video production," "DVD production," "Website production," and "Other" should be 100%.

4 Amount of Acquisition and Capital Investment, etc.

(1) Amount of acquisition and capital investment

Enter the actual amount of capital investment and the forecast of capital investment (the acquisition value before depreciation of fixed assets (including the construction in progress account) during the period in question) for your company's program production business.

Category	FY2011 Performance					FY2012 Forecast				
	million yen					million yen				
Amount of acquisition and capital investment										
Software										

(Note 1) Enter the amount (on a construction basis) only for the program production business.

(Note 2) Please be careful not to redundantly calculate a construction in progress account transferred to the real account.

(Note 3) For software expenses, enter the amount only capitalized as intangible fixed assets.

(2) Digitalization of instruments

Enter the total number of instruments that your company is using, and also enter the number of digitalized ones among them.

Classification	Instruments that your company is using (As of the end of FY2011)			
	Purchased		Rental	
	Digitalized ones	Digitalized ones	Digitalized ones	Digitalized ones
	(unit)	(unit)	(unit)	(unit)
VTRs				
Cameras				
Editing machines				

5 Workers

Enter the number of workers for your company's program production business.

< As of the end of FY2011 >

(persons)

Classification	Regular workers (excl. temporary or daily workers)	Full-time workers (excl. workers transferred to other companies)	Part-timers	Workers transferred to other companies	Temporary or daily workers	Dispatched workers

(Note 1) For "Regular workers," enter the total number of paid directors and regularly employed persons (persons, regardless of their titles as full-time, part-time, temporary or contract workers, employed under a contract longer than one month, or persons employed for 18 days or more each month in the two months prior to the end of the financial year).

(Note 2) For "Full-time workers," enter the number of regular workers generally referred to as full-time workers.

(Note 3) For "Part-timers," enter the number of regular workers whose scheduled daily working hours or the number of working days in a week are shorter than full-time workers.

(Note 4) For "Workers transferred to other companies, etc.," enter the number of workers transferred to subsidiaries and affiliates, and whose salaries are paid mainly by your company.

(Note 5) "Temporary or daily workers" refer to persons who are employed for a period of up to one month, or those who are brought in on a daily basis.

(Note 6) "Dispatched workers" refer to workers who are employed by a worker dispatching business operator and are engaged in your company's operations under your company's supervision and command, based on a contract between your company and the worker dispatching business operator concerned, under the aforementioned employment relationship.

6 Number of Contracts for Broadcasting Programs, etc.

(1) How you start program production

Presuming the total number of program production-related contracts concluded in FY2011 to be 100%, enter the appropriate percentages for methods used that led to contracts, in accordance with the following classification.

Your company brought in the project	An agency brought in the project	A broadcast station brought in the project	Bid contract	(Other)	Total
%	%	%	%	%	100%

(Note) The sum of the percentages entered in the columns for "Your company brought in the project," "An agency brought in the project," "A broadcast station brought in the project," "Bid contract," and "Other" should be 100%.

(2) Number of contracts and those in writing

Enter the total number of program production contracts concluded in FY2011, and also enter the number of contracts under which orders were made in writing.

Total number of contracts	Contracts under which orders were made in writing
cases	cases

(3) Secondary use of TV programs

Regarding conditions for the secondary use of TV programs (excluding commercial messages) that your company produced and delivered as a complete package in FY2011, enter the number of programs, in accordance with the following classification.

A broadcast station refers to the one that broadcasted the program for the primary use (including rebroadcasting defined in the original agreement). Where there are any right holders, such as a scenarist or a performer, other than your company and the broadcast station, assume that their consent can be obtained.

Number of TV programs (excluding commercial messages) that your company produced and delivered as a complete package in FY2011				
Classification	Sales to other stations	Packaging as DVDs or videos	Sales overseas	Internet delivery
The secondary use of the program is under your company's authority (consent from the broadcast station is not required)				
Both your company and the broadcast station can decide on the secondary use unilaterally.				
The program can be provided for the secondary use under an agreement between your company and the broadcast station.				
The secondary use of the program is under the authority of the broadcast station.				

(Note 1) A complete package refers to a program that is completely recorded and edited and is ready to be broadcasted at any time.

(Note 2) "Sales to other stations" include program sales to earth stations (including local stations), satellite broadcast stations, and CATVs, but exclude program sales for IP multicast broadcasting. The latter should be included in "Internet delivery."

(Note 3) "Sales overseas" include format sales, etc.

(Note 4) "Internet delivery" includes IPTV services, such as video on demand (VOD), downloading, and IP multicast broadcasting.

(4) Mode of secondary use of TV programs

Circle all applicable numbers regarding actual modes of the secondary use of TV programs (excluding commercial messages) for which your company has authority in FY2011.

When you circle No. 10, enter the reason therefore.

1	Making the program into a video (incl. DVDs, BDs, and CD-ROMs)	7	Rebroadcasting the program
2	Using the program for publication	8	Using the program materials and formats
3	Using the program as a cable TV program	9	Other ()
4	Using the program as a satellite TV program	10	TV programs are not provided for secondary use. < Reasons >
5	Delivering the program via the Internet		
6	Selling the program overseas		

(Note) Satellite broadcasting includes BS, 110 east longitude CS, and other CS broadcasting.

(5) Copyrights

How are titles displayed for the TV programs (excluding commercial messages) that your company produced and delivered as a complete package in FY2011?

① Only your company name is displayed for the title of the "producer and writer."	%
② Only the name of the broadcast station is displayed for the title of the "producer and writer."	%
③ Both your company name and the name of the broadcast station are displayed for the title of the "producer" (including the title of the joint producers).	%
④ Only your company name is displayed for the title of the "producer."	%
⑤ Only your company name is displayed as those having offered "production cooperation," "planning cooperation," "technical cooperation," and "art cooperation."	%
⑥ Only the name of the broadcast station is displayed for the title of the "producer and writer," and only your company name is displayed for the title of the "producer."	%
⑦ Only the name of the broadcast station is displayed for the title of the "producer and writer," and only your company name is displayed as those having offered "production cooperation," "planning cooperation," "technical cooperation," and "art cooperation."	%
⑧ Other ()	%
Total	100 %

(Note) The sum of ①+②+③+④+⑤+⑥+⑦+⑧ should be 100%.

7 Status of Businesses Outsourcing

(1) Circle the applicable number regarding your company's implementation status of outsourcing for your program production business.

- 1. Implemented outsourcing in FY2011 ⇒ Enter (2)
- 2. Did not implement outsourcing ⇒ Go to 8

(2) Enter the amount of your company's outsourcing cost for your program production business.

< FY2011 >

Category	Outsourcing cost			Affiliates		
	million yen			million yen		
Outsourcing for the program production business						
Overseas						

(Note) An affiliate refers to a subsidiary, affiliated company or parent company.

8 Business Operation

Circle the applicable number regarding your company's business operation policy for your program production business.

(1) Is your company now providing services overseas? What are your future plans?

1. We are providing services overseas and are going to expand the business.
2. We are providing services overseas and are going to maintain the status quo.
3. We are providing services overseas but are going to downsize the business (incl. withdrawal).
4. We are not providing services overseas, but are going to start doing so.
5. We are not providing services overseas, but are now considering doing so.
6. We are not providing services overseas, and have no plans to do so.

(2) Is your company now outsourcing jobs overseas? What are your future plans?

1. We are outsourcing jobs overseas and are going to expand the business.
2. We are outsourcing jobs overseas and are going to maintain the status quo.
3. We are outsourcing jobs overseas but are going to downsize the business (incl. withdrawal).
4. We are not outsourcing jobs overseas, but are going to start doing so.
5. We are not outsourcing jobs overseas, but are now considering doing so.
6. We are not outsourcing jobs overseas, and have no plans to do so.

9 Future Business Operation

Circle the applicable number for each of ① to ⑫, regarding the businesses and new technologies listed as follows.

For ⑫, enter specific contents and circle the applicable number.

Business details	Already engaged	Planning to start within a year	Want to start in two to three years	Not interested at present
① Commercial message production	1	2	3	4
② Production of software for sale (videos)	1	2	3	4
③ Business related to events and exhibitions	1	2	3	4
④ Satellite broadcasting	1	2	3	4
⑤ Hi-definition production and related technologies	1	2	3	4
⑥ Provision of programs for cable TV	1	2	3	4
⑦ Computer graphics production	1	2	3	4
⑧ Game software production	1	2	3	4
⑨ Internet program (screen) production	1	2	3	4
⑩ Program sales overseas	1	2	3	4
⑪ Subtitle production for those with auditory difficulties	1	2	3	4
⑫ Other ()	1	2	3	4

(Note) Satellite broadcasting includes BS, 110 east longitude CS, and other CS broadcasting.

10 Management Problems

Circle all applicable numbers regarding your company's management problems. (Multiple answers allowed)

1	Low unit prices of orders	8	Improvement of facilities and equipment
2	Stability of orders	9	Digitalization of broadcasting
3	Securing of experienced and skilled workers	10	Procurement of funds
4	Improvement of capabilities to produce contents	11	High personnel cost
5	Enhancement of employee training	12	Lack of fairness and transparency in transaction practices with broadcast stations
6	Strengthening of marketing power	13	Procedures for licensing for the distribution of broadcasting programs
7	High equipment cost	14	Other ()
		15	No management problems



2012 Basic Survey on the Information and Communications Industry (IV)

(Internet Based Services)

(As of March 31, 2012)

- ☆ This survey is a general statistical survey in accordance with the Statistics Act (2007, Act No. 53).
- ☆ Information in this survey form will be used only to compile statistics and **will not be used in any way that might bring advantage or disadvantage to the reporter**. Please provide accurate and true information.
- ☆ Please refer to the **Guide for Completing the Survey** and enter clearly using a black or blue ball-point pen.
All figures must be entered in the units specified by the survey.
- ☆ Please provide information as of March 31, 2012, for this survey and **enter the settlement results for fiscal 2011. If this is not possible, enter results for the nearest settlement term.**
If the settlement term has changed, please refer to the Guide for Completing the Survey.
- ☆ Please **submit this survey form by July 15, 2012.**

1 Company Profile

(1) Company name		Phone no. (Main line)
(2) Address of company head office (location where actual head office functions are performed)	Zip code (—) Prefecture City Ward (Name of building)	

Full name of the person who completed the survey form	
Department and address of the person who will answer inquiries about the content of this form (person who completed the form)	Department name Phone no. (Area code) - (Ext.) ----- Contact address (enter only if different from the address of the head office given above)
Remarks (enter if there is anything in particular that should be mentioned regarding the content of this form.)	

2 Sales

Enter the breakdown of sales or the amount of revenue from your company's Internet based service business.
Also enter the percentage of advertising revenue in whole numbers.

Classification		million yen						Percentage of advertising revenue
1	Web information search services							%
2	Internet shopping site operation services							%
3	Internet auction site operation services							%
4	Electronic bulletin board services, blog services, and SNS operation services							%
5	Web contents delivery services							%
5-1	Revenue from IPTV services							/
6	Cloud computing services (excluding software development)							
7	Electronic authentication services							
8	Information network security services							
9	Charging/settlement agent services							
10	Server management consignment							
11	Other Internet based services ()							
12	Total sales of Internet based service business in FY2011							

(Note 1) "Web information search services" refers to services that search various information on Internet websites.

(Note 2) "Revenue from IPTV services" refers to revenue from services to deliver images using the Internet such as video on demand (VOD), download, and IP multicast broadcasting.

(Note 3) "Cloud computing services" refers to services that are provided through the internet, such as "ASP" (Application Service Provider), "SaaS" (Software as a Service), "HaaS" (Hardware as a Service), etc. Cloud computing services do not include consistent services starting from the development of software.

(Note 4) "Web contents delivery services" refers to services that deliver music and images mainly via the Internet. The services include mobile delivery and exclude telecommunication broadcasting.

		million yen					
Total forecast sales for Internet base services in FY2012							

3 Number of Registered Tenants and Customers

Enter the number of registered tenants and customers as of March 31, 2012.

< As of the end of FY2011 >

	Registered tenants		Registered customers			
	Corporate	Individual	Corporate members	Dues-paying members	Individual members	Dues-paying members
Web information search services						
Internet shopping site operation services						
Internet auction site operation services						
Electronic bulletin board services, blog services, and SNS operation services						
Web contents delivery services						

4 Amount of Acquisition and Capital Investment

Enter the actual amount of capital investment and the forecast of capital investment (the acquisition value before depreciation of fixed assets (including the construction in progress account) during the period in question) for your company's Internet based service business.

Category	FY2011 Performance				FY2012 Forecast			
	million yen				million yen			
Amount of acquisition and capital investment								
Information and communications equipment								
Software								

(Note 1) Enter the amount (on a construction basis) only for the Internet based service business.

(Note 2) Please be careful not to redundantly calculate a construction in progress account transferred to the real account.

(Note 3) For software expenses, enter the amount only capitalized as intangible fixed assets.

5 Status of Businesses Outsourcing

(1) Circle the applicable number regarding your company's implementation status of outsourcing for work related to the Internet based service business.

- 1. Implemented outsourcing in FY2011 ⇒ Enter (2)
- 2. Did not implement outsourcing ⇒ Go to 6

(2) Enter the amount of your company's outsourcing cost for your Internet based service business.

<FY2011 >

Category	Outsourcing cost				Affiliates			
	million yen				million yen			
Outsourcing for the Internet based service business								
Overseas								

(Note) An affiliate refers to a subsidiary, affiliated company or parent company.

6 Workers

Enter the number of workers for your company's Internet based service business. Also enter the total number of newly hired full-time workers, the number of new graduates among them, and the number of resignees; and the total number of newly hired contract workers, the number of new graduates among them, and the number of those with cancelled contracts in FY2011.

Internet based service business	Number of workers (As of the end of FY2011)	Newly hired full-time workers and contract workers (FY2011)		Resignees and those with cancelled contracts (FY2011)
			New graduates	
Regular workers (excl. temporary or daily workers)				
Full-time workers (excl. workers transferred to other companies)				
Part-timers				
Workers transferred to other companies				
Contract workers (incl. freelancers)				
Temporary or daily workers				
Dispatched workers				

(Note 1) For "Regular workers," enter the total number of paid directors and regularly employed persons (persons, regardless of their titles as full-time, part-time, temporary or contract workers, employed under a contract longer than one month, or persons employed for 18 days or more each month in the two months prior to the end of the financial year).

(Note 2) For "Full-time workers," enter the number of regular workers generally referred to as full-time workers.

(Note 3) For "Part-timers," enter the number of regular workers whose scheduled daily working hours or the number of working days in a week are shorter than full-time workers.

(Note 4) For "Workers transferred to other companies, etc.," enter the number of workers transferred to subsidiaries and affiliates, and whose salaries are paid mainly by your company.

(Note 5) "Contract workers" refers to regular workers engaged in work under a terminable employment contract and does not include part-timers. A "freelancer" refers to a person who neither belongs to nor is under an exclusive contract with any specific company but concludes a contract each time for each work.

(Note 6) "Temporary or daily workers" refer to persons who are employed for a period of up to one month, or those who are brought in on a daily basis.

(Note 7) "Dispatched workers" refer to workers who are employed by a worker dispatching business operator and are engaged in your company's operations under your company's supervision and command, based on a contract between your company and the worker dispatching business operator concerned, under the aforementioned employment relationship.

7 Human Resource Development

Circle all applicable numbers regarding your company's human resource development in the Internet based service business section. (Multiple answers allowed)

1. OJT (Guidance and training on the job)
2. Provide in-house training
3. Utilize external training sessions, and courses at universities or professional schools (incl. assistance for schooling)
4. Provide assistance for taking various tests and grant qualification allowances
5. Other means
6. Nothing

8 Business Operation

Circle the applicable number regarding your company's business operation policy for your Internet based service business.

(1) Is your company now carrying out any business-academia collaboration? What are your future plans?

(ex. Joint development, joint production, consignment and acceptance of research, etc. with universities)

1. We are carrying out collaboration and are going to expand it.
2. We are carrying out collaboration and are going to maintain the status quo.
3. We are carrying out collaboration but are going to downsize it (incl. withdrawal).
4. We are not carrying out collaboration, but are going to start doing so.
5. We are not carrying out collaboration, but are now considering doing so.
6. We are not carrying out collaboration, and have no plans to do so.

(2) Is your company now providing services overseas? What are your future plans?

1. We are providing services overseas and are going to expand the business.
2. We are providing services overseas and are going to maintain the status quo.
3. We are providing services overseas but are going to downsize the business (incl. withdrawal).
4. We are not providing services overseas, but are going to start doing so.
5. We are not providing services overseas, but are now considering doing so.
6. We are not providing services overseas, and have no plans to do so.

(3) Is your company now outsourcing jobs overseas? What are your future plans?

1. We are outsourcing jobs overseas and are going to expand the business.
2. We are outsourcing jobs overseas and are going to maintain the status quo.
3. We are outsourcing jobs overseas but are going to downsize the business (incl. withdrawal).
4. We are not outsourcing jobs overseas, but are going to start doing so.
5. We are not outsourcing jobs overseas, but are now considering doing so.
6. We are not outsourcing jobs overseas, and have no plans to do so.

9 Efforts for Acquiring Certification

Circle the applicable number regarding your company's efforts for acquiring certification.

< As of the end of FY2011 >

	Already acquired and implementing	Considering and planning	Recognizing the necessity, but not acquired	Not recognizing the necessity, and not acquired	Acquired and implemented in the past, but not now
Privacy mark					
ISO 9001 (Quality)					
ISO 20000 (IT services)					
ISO 27001, ISMS (Information security)					
BS 25999 (Business continuity)					

(Note 1) "Privacy mark" refers to the system under which business operators are assessed in regard to whether they deal with personal information properly, in line with the standard. Those assessed positively are granted certification.

(Note 2) "ISO 9001" refers to the quality management system standard aiming to enhance customer satisfaction through guaranteeing the quality of products and services.

(Note 3) "ISO 20000" refers to the IT service management system standard that enables the enhancement of the organization value by providing high quality IT services.

(Note 4) "ISO 27001" refers to the information security management system standard for continuously ensuring and maintaining the confidentiality, completeness, and availability of information. "ISMS" refers to the conformity assessment system of the Information Security Management System.

(Note 5) "BS 25999" refers to the business continuity management system standard that enables the enhancement of the organization value against risks threatening business continuity.

10 Future Business Operation

Circle all applicable numbers regarding new businesses that your company intends to start within one year, in relation to the current businesses. (Multiple answers allowed)
 For "Other," enter specific business names.

1	DSL services	23	Information network security services
2	FTTH services	24	Charging/settlement agent services
3	Wireless Internet access	25	Server management consignment
4	IDC (Internet Data Center)	26	Other Internet based services
5	ISP	27	Software services
6	Terrestrial broadcasting	28	Data processing and information services
7	Satellite communications	29	Production of digital contents other than websites
8	International communications	30	Provision of digital contents other than websites
9	Satellite broadcasting (BS)	31	IT personnel dispatch services
10	Satellite broadcasting (110 east longitude CS)	32	Consulting
11	Satellite broadcasting (Other CS)	33	Internet mail order services
12	Cable television broadcasting	34	Internet advertising
13	Cable Internet	35	Other (Enter business names) []
14	IPTV services (Internet video delivery)		
15	Web information search services		
16	Operation of an Internet shopping site		
17	Operation of an Internet auction site		
18	Electronic bulletin board services, blog services, and SNS operation		
19	Cloud computing services		
20	Web contents delivery		
21	IPTV services (Internet video delivery)		
22	Electronic authentication services	36	No new businesses planned



2012 Basic Survey on the Information and Communications Industry (V)

(Information Services)

(As of March 31, 2012)

- ☆ This survey is a general statistical survey in accordance with the Statistics Act (2007, Act No. 53).
- ☆ Information in this survey form will be used only to compile statistics and **will not be used in any way that might bring advantage or disadvantage to the reporter.** Please provide accurate and true information.
- ☆ Please refer to the **Guide for Completing the Survey** and enter clearly using a black or blue ball-point pen. All figures must be entered in the units specified by the survey.
- ☆ Please provide information as of March 31, 2012, for this survey and **enter the settlement results for fiscal 2011. If this is not possible, enter results for the nearest settlement term.** If the settlement term has changed, please refer to the **Guide for Completing the Survey**.
- ☆ Please **submit this survey form by July 15, 2012.**

1 Company Profile

(1) Company name		Phone no. (Main line)
(2) Address of company head office (location where actual head office functions are performed)	Zip code (-) Prefecture City Ward (Name of building)	

Full name of the person who completed the survey form		
Department and address of the person who will answer inquiries about the content of this form (person who completed the form)	Department name	
	Phone no. (Area code) - (Ext.)	
Contact address (enter only if different from the address of the head office given above.)		
Remarks (Enter if there is anything in particular that should be mentioned regarding the content of this form.)		

2 Sales

Circle the applicable number regarding your company's sales related to information services.

2001	1. In Japan only	2. Japan and overseas	3. Overseas only
------	------------------	-----------------------	------------------

(Note) If you select 2. or 3., please also fill out "Percentage of overseas sales."

Enter the sales of your company's information service business and the percentage of overseas sales in whole numbers.

Classification		million yen				Percentage of overseas sales
Custom software services	2002					%
Embedded software services	2003					%
Package software services	2004					%
Game software services	2005					%
Data processing services	2006					%
Research and information services, except marketing or opinion research services	2007					%
Miscellaneous data processing and information services	2008					%
Total sales of information service business in FY2011	2009					%

(Note 1) If you accepted work for software that targets an unspecified number of users, include this in "Package software services" or "Game software services," and not "Custom software services."

(Note 2) Include sales from ASP and SaaS that provide consistent services starting from the development of software in those from "Data processing services."

(Note 3) Include sales from accepted orders to produce websites, including program creation, in those from "Custom software services."

3 Operating Expenses

Enter the amount of advertising expenses for your company's products and services in the information service business and the breakdown percentages in whole numbers.

< FY2011 >

Category		million yen			
Advertising expenses for your company's products and services	3001				

(Note) Enter the percentage based on "Advertising expenses for your company's products and services" as 100%.

< FY2011 >

		Sales promotion expenses (incl. events)	Media advertising expenses						Other
				TV commercials	Newspapers and magazines	Net advertisement	Transit advertisement	Outdoor advertisement	
Breakdown percentages	3002	%	%	%	%	%	%	%	%

(Note) The sum of "Sales promotion expenses," "Media advertising expenses," and "Other" should be 100%.

4 Efforts for Acquiring Certification

Enter a circle in the applicable column regarding your company's efforts for acquiring certification. (Answer all items.)

< As of the end of FY2011 >

		Already acquired and implementing	Considering and planning	Recognizing the necessity, but not acquired	Not recognizing the necessity, and not acquired	Acquired and implemented in the past, but not now
Privacy mark	4001					
ISO 9001 (Quality)	4002					
ISO 20000 (IT services)	4003					
ISO 27001, ISMS (Information security)	4004					
CMMI (Capability Maturity Model Integration)	4005					
BS 25999 (Business continuity)	4006					

(Note 1) "Privacy mark" refers to the system under which business operators are assessed in regard to whether they deal with personal information properly, in line with the standard. Those assessed positively are granted certification.

(Note 2) "ISO 9001" refers to the quality management system standard aiming to enhance customer satisfaction through guaranteeing the quality of products and

(Note 3) "ISO 20000" refers to the IT service management system standard that enables the enhancement of the organization value by providing high quality IT services.

(Note 4) "ISO 27001" refers to the information security management system standard for continuously ensuring and maintaining the confidentiality, completeness, and availability of information. "ISMS" refers to the conformity assessment system of the Information Security Management System.

(Note 5) "CMMI (Capability Maturity Model Integration)" refers to a model for enhancing the processing capability of an organization.

(Note 6) "BS 25999" refers to the business continuity management system standard that enables the enhancement of the organization value against risks threatening business continuity.

5 Situation of the Development and Production Section

○ Is your company **engaged in development and production work**? Circle the applicable number.

5001

1. Yes

2. No



You do not need to answer any more questions. Thank you very much for your cooperation.

Fill in your answers for (1) to (8).

(1) Status of Businesses Outsourcing

① Circle the applicable number regarding your company's implementation status of outsourcing for development and production work.

5101

1. Implemented outsourcing in FY2011 ⇒ Enter ② and ③

2. Did not implement outsourcing ⇒ Go to (2)

(Note) Even if part of work related to development and production was outsourced, "Implemented outsourcing" is applicable.

② Enter the amount of your company's outsourcing cost for development and production work.

<FY2011>

Category		Outsourcing cost		Affiliates	
		million yen		million yen	
Outsourcing of development and production work	5102				
In Japan	5103				
Overseas	5104				
Asia	5105				
China	5106				
India	5107				
Vietnam	5108				
The Philippines	5109				
United States	5110				

(Note) An affiliate refers to a subsidiary, affiliated company or parent company.

③ Enter the number of outsourced projects, products, and contents, and the percentage of sales-based payment (in whole number).

<FY2011>

		Number	Percentage of sales-based payment
Number of outsourced projects, products and contents	5111		%

(Note) "Sales-based payment" refers to a payment method based on the sales and profits of the orderer, apart from methods such as fixed payment or purchase at a fixed amount.

(2) Status of Acceptance of Commissioned Work

① Circle the applicable number regarding your company's acceptance of commissioned work related to development and production (prime contract and subcontract).

- | | | | |
|------|---|---|---------------|
| 5201 | 1. Accepted work from other companies in FY2011 | ⇒ | Enter ② and ③ |
| | 2. Did not accept work from other companies | ⇒ | Go to (3) |

(Note) Even if part of work related to development and production was accepted, "Accepted work from other companies" is applicable.

② Enter the amount of development and production work that your company accepted as a primary contractor or subcontractor.

<FY2011>

Category		Acceptance of work from other companies				Affiliates			
		million yen				million yen			
Acceptance of development and production work	5202								
In Japan	5203								
Overseas	5204								
United States	5205								
Europe (EU)	5206								
Asia	5207								
China	5208								
South Korea	5209								
Taiwan	5210								
India	5211								

(Note) An affiliate refers to a subsidiary, affiliated company or parent company.

③ Regarding the amount of commissioned work that your company accepted (② above), enter the percentages of contract statuses in whole numbers.

<FY2011>

		As the primary contractor	As the first subcontractor	As the second subcontractor	As the third or lower level subcontractor
Percentage of primary contracts and subcontracts	5212	%	%	%	%

(3) Workers

① Enter the number of workers engaged in your company's development and production work (incl. foreign regular workers). Also enter the total number of newly hired full-time workers, the number of new graduates among them, and the number of resignees; and the total number of newly hired contract workers, the number of new graduates among them, and the number of those with cancelled contracts in FY2011.

(persons)

Development and production section (incl. foreigners)		Number of workers (As of the end of FY2011)	Newly hired full-time workers and contract workers		Resignees and those with cancelled contracts (FY2011)
			(FY2011)	New graduates	
Regular workers (excl. temporary or daily workers)	5301				
Full-time workers (excl. workers transferred to other companies)	5302				
Part-timers	5303				
Workers transferred to other companies	5304				
Contract workers (incl. freelancers)	5305				
Temporary or daily workers	5306				
Dispatched workers	5307				

(Note 1) For "Regular workers," enter the total number of paid directors and regularly employed persons (persons, regardless of their titles as full-time, part-time, temporary or contract workers, employed under a contract longer than one month, or persons employed for 18 days or more each month in the two months prior to the end of the financial year).

(Note 2) For "Full-time workers," enter the number of regular workers generally referred to as full-time workers.

(Note 3) For "Part-timers," enter the number of regular workers whose scheduled daily working hours or the number of working days in a week are shorter than full-time workers.

(Note 4) For "Workers transferred to other companies, etc.," enter the number of workers transferred to subsidiaries and affiliates, and whose salaries are paid mainly by your company.

(Note 5) "Contract workers" refers to regular workers engaged in work under a terminable employment contract and does not include part-timers. A "freelancer" refers to a person who neither belongs to nor is under an exclusive contract with any specific company but concludes a contract each time for each work.

(Note 6) "Temporary or daily workers" refer to persons who are employed for a period of up to one month, or those who are brought in on a daily basis.

(Note 7) "Dispatched workers" refer to workers who are employed by a worker dispatching business operator and are engaged in your company's operations under your company's supervision and command, based on a contract between your company and the worker dispatching business operator concerned, under the aforementioned employment relationship.

② Enter the breakdown of foreigners, from among full-time and contract workers engaged in development and production work in ① above.

(persons)

Development and production section (only foreigners)		Number of workers (As of the end of FY2011)	Newly hired full-time workers and contract workers (FY2011)	Resignees and those with cancelled contracts (FY2011)
Asian	5309			
Chinese	5310			
Indian	5311			
Vietnamese	5312			
Philippines	5313			
American	5314			
Foreign contract workers (incl. freelancers)	5315			
Asian	5316			
Chinese	5317			
Indian	5318			
Vietnamese	5319			
Philippines	5320			
American	5321			

(4) Wage system for engineers

Circle the applicable number regarding your company's wage system for engineers in the development and production section.

- | | | |
|------|--------------------------------------|---|
| 5401 | Full-time workers | <ul style="list-style-type: none"> 1. Only the seniority system 2. Mainly the seniority system (partially in accordance with performance) 3. Mainly the performance-based system (partially based on the seniority system) 4. Only the performance-based system |
| 5402 | Contract workers (incl. freelancers) | <ul style="list-style-type: none"> 1. Only the seniority system 2. Mainly the seniority system (partially in accordance with performance) 3. Mainly the performance-based system (partially based on the seniority system) 4. Only the performance-based system |

(Note) "Engineers" refers to system engineers, programmers, and researchers.

(5) Wages (annual income) of engineers

Enter information on the wages of engineers in the development and production section who are 35 years of age. If there are no 35-year old engineers, enter information of those around that age.

① Enter the average annual income.

< FY2011 >

Average annual income of 35-year old engineers		10 thousand yen		
Full-time workers	5501
Contract workers (incl. freelancers)	5502

② How many times the average income is the income of the 35-year old worker with the highest annual income? Circle the applicable number.

5503 Full-time workers

1. From 1 to 1.5 times the average
2. From over 1.5 times to 2 times
3. From over 2 times to 3 times
4. From over 3 times to 4 times
5. Over 4 times

5504 Contract workers (incl. freelancers)

1. From 1 to 1.5 times the average
2. From over 1.5 times to 2 times
3. From over 2 times to 3 times
4. From over 3 times to 4 times
5. Over 4 times

(6) Human resource development

① Circle all applicable numbers regarding your company's human resource development in the development and production section. (Multiple answers allowed)

5601

1. OJT (Guidance and training on the job)
2. Provide in-house training
3. Utilize external training sessions, and courses at universities or professional schools (incl. assistance for schooling)
4. Provide assistance for taking the Information Technology Engineers Examination and grant qualification allowances
5. Provide assistance for taking various private information processing technology tests and grant qualification allowances
6. Other means
7. Nothing

② Does your company use the following indicators for fostering and assessing engineers? Circle the applicable number. (Answer all items.)

5602 IT Skill Standards (ITSS)

1. Yes
2. No

5603 Embedded Technology Skill Standards (ETSS)

1. Yes
2. No

5604 Users' Information Systems Skill Standards (UISS)

1. Yes
2. No

(7) Business operation

Circle the applicable number regarding your company's business operation policy for the development and production work.

① Is your company now carrying out any business-academia collaboration? What are your future plans?

(ex. Joint development, joint production, consignment and acceptance of research, etc. with universities)

5701

1. We are carrying out collaboration and are going to expand it.
2. We are carrying out collaboration and are going to maintain the status quo.
3. We are carrying out collaboration but are going to downsize it (incl. withdrawal).
4. We are not carrying out collaboration, but are going to start doing so.
5. We are not carrying out collaboration, but are now considering doing so.
6. We are not carrying out collaboration, and have no plans to do so.

② Is your company now carrying out any employee training by utilizing universities, etc.? What are your future plans?

(ex. Recurrent education (re-education and learning at universities), and employee training by invited university teachers, etc.)

5702

1. We are carrying out employee training and are going to expand it.
2. We are carrying out employee training and are going to maintain the status quo.
3. We are carrying out employee training but are going to downsize it (incl. withdrawal).
4. We are not carrying out employee training, but are going to start doing so.
5. We are not carrying out employee training, but are now considering doing so.
6. We are not carrying out employee training, and have no plans to do so.

③ Is your company now providing any cooperation for university education? What are your future plans?

(ex. Acceptance of student and teacher interns, giving of donations, and dispatch of lecturers, etc.)

5703

1. We are providing cooperation and are going to expand it.
2. We are providing cooperation and are going to maintain the status quo.
3. We are providing cooperation but are going to downsize it (incl. withdrawal).
4. We are not providing cooperation, but are going to start doing so.
5. We are not providing cooperation, but are now considering doing so.
6. We are not providing cooperation, and have no plans to do so.

④ Is your company now doing business overseas (including sales of products)? What are your future plans?

5704

1. We are doing business overseas and are going to expand the business.
2. We are doing business overseas and are going to maintain the status quo.
3. We are doing business overseas but are going to downsize the business (incl. withdrawal).
4. We are not doing business overseas, but are going to start doing so.
5. We are not doing business overseas, but are now considering doing so.
6. We are not doing business overseas, and have no plans to do so.

⑤ Is your company now outsourcing jobs overseas? What are your future plans?

5705

1. We are doing business overseas and are going to expand the business.
2. We are doing business overseas and are going to maintain the status quo.
3. We are doing business overseas but are going to downsize the business (incl. withdrawal).
4. We are not doing business overseas, but are going to start doing so.
5. We are not doing business overseas, but are now considering doing so.
6. We are not doing business overseas, and have no plans to do so.

(8) Development of game software

○ Does your company develop game software? Circle the applicable number.

5801

1. Yes

2. No



You do not need to answer any more questions. Thank you very much for your cooperation.

Fill in your answers for ① to ④.

① Enter the number of contents and works of games that your company developed in FY2011.

<FY2011>

		Number of contents and works
Number of developed games	5802	

② Regarding the games that your company developed (① above), enter the ratio of your company's rights as of March 31, 2012.

< As of the end of FY2011 >

Ratio		Number of rights concerning the primary use	Number of rights concerning the secondary use
100%	5803		
50% or more to less than 100%	5804		
0% or more to less than 50%	5805		
0% (Holding no rights)	5806		

(Note) The "secondary use" of games includes the commercialization of character goods, making of animated films, and publication.

③ Is your company promoting the documentation and compilation of a database concerning game development? Circle the applicable number.

5807

Yes	To some extent	Neutral	Not really	No
1	2	3	4	5

④ If so, does your company use documents and a database that it made in the past? Circle the applicable number.

5808

Yes	To some extent	Neutral	Not really	No
1	2	3	4	5



2012 Basic Survey on the Information and Communications Industry (VI)

(Video Picture, Sound Information, Character Information Production and Distribution)

(As of March 31, 2012)

- ☆ This survey is a general statistical survey in accordance with the Statistics Act (2007, Act No. 53).
- ☆ Information in this survey form will be used only to compile statistics and **will not be used in any way that might bring advantage or disadvantage to the reporter.** Please provide accurate and true information.
- ☆ Please refer to the **Guide for Completing the Survey** and enter clearly using a black or blue ball-point pen. All figures must be entered in the units specified by the survey.
- ☆ Please provide information as of March 31, 2012, for this survey and **enter the settlement results for fiscal 2011. If this is not possible, enter results for the nearest settlement term.** If the settlement term has changed, please refer to the **Guide for Completing the Survey**.
- ☆ Please **submit this survey form by July 15, 2012.**

1 Company Profile

(1) Company name		Phone no. (Main line)
(2) Address of company head office (location where actual head office functions are performed)	Zip code (—) Prefecture City Ward (Name of building)	

Full name of the person who completed the survey form		
Department and address of the person who will answer inquiries about the content of this form (person who completed the form)	Department name	
	Phone no. (Area code) - (Ext.)	Contact address (enter only if different from the address of the head office given above.)
Remarks (Enter if there is anything in particular that should be mentioned regarding the content of this form.)		

2 Sales

Enter the sales of your company's video picture, sound information, character information production and distribution business.

Classification			million yen			
Content production section	Motion picture and video production, except television program and animation production	2001				
	Animation production	2002				
	Recording and disk production	2003				
	Newspaper publishers	2004				
	Publishers, except newspapers	2005				
	Commercial art and graphic design	2006				
	Motion picture, video and television program distribution	2007				
	News syndicates (News suppliers)	2008				
	Miscellaneous services incidental to video picture, sound information, character information production and distribution	2009				
Total sales of video picture, sound information, character information production and distribution business in FY2011		2010				

3 Business Operation

Circle all applicable numbers regarding your company's business operation policy. (Multiple answers allowed for businesses)

< As of the end of FY2011 >

Business operation		Already doing it	Plan to start it within one year	Not doing it now, but it is possible due to our holding the rights or other reasons
TV program (incl. animation) production	3001			
Motion picture (incl. animation) production	3002			
Commercial message production, and commercial art and graphic design	3003			
Visual software (videos, DVDs, etc.) production	3004			
CD production	3005			
TV broadcasting (incl. rebroadcasting)	3006			
Radio program production and broadcasting	3007			
Delivery through the Internet	3008			
Delivery to mobile devices (mobile phones, mobile AV equipment, etc.)	3009			
Publication (magazines, newspapers, e-publishing, etc.)	3010			
Commercialization of goods (merchandise)	3011			
Collaboration with games, Japanese pinball, and karaoke, etc.	3012			
Provision as materials and formats for other contents	3013			
Stage show (incl. concerts and musicals) production	3014			
Events and exhibitions	3015			
Sales to overseas markets	3016			
Other	3017			

(Note) "Not doing it now, but it is possible due to our holding the rights or other reasons," applies to cases where there are no plans for new approaches within the following year, and there is holding of rights, etc.

4 Charge System

○ If your company is **providing video picture and music delivery services**, circle the applicable number regarding the charge system.

4001

1. Flat-rate system
3. Combination of both systems

2. Pay-as-you-go system
4. Free delivery using an advertising model

5 Situation of the Content Production Section

"Content production" refers to the production of motion pictures, DVDs (videos), animation, CDs (records), newspapers, and publications.

- Is your company **engaged in content production?** Circle the applicable number.

(If you have sales from the "Content production section" in Question 2 above, select "1 Yes." If you do not have sales, select "2. No.")

5001 1. Yes 2. No → You do not need to answer any more questions. Thank you very much for your cooperation.

Fill in your answers for 5 (1) to (9) and 6.

(1) Number of produced contents and ratio of your company's rights

- ① Enter the number of contents (works) that your company produced in FY2011. Count all series with the same title as one.

< FY2011 >

		Number of contents and works
Number of produced contents	5101	

- ② Regarding the contents (① above), enter the ratio of your company's rights as of March 31, 2012.

< As of the end of FY2011 >

Ratio		Number of rights concerning the primary use	Number of rights concerning the secondary use
100%	5102		
50% or more to less than 100%	5103		
0% or more to less than 50%	5104		
0% (Holding no rights)	5105		

(Note) The "primary use" refers to the use in line with the original purpose of the contents (works), and the "secondary use" refers to the use by different media.

(2) Copyrights

- ① Are works that your company produced protected by Digital Rights Management (DRM) for preventing private copying? When some are protected and others not, choose those that are larger in number, and circle the applicable number.

5201 Packaged (CDs, DVDs, etc.) 1. Yes 2. No

5202 Delivered (Internet delivery, mobile phone delivery) 1. Yes 2. No

- ② Circle the number that most closely represents your company's policy on copyright protection.

A: In order to prevent illegal private use, copyright protection measures such as DRM should be strengthened.

B: As free private use of a certain level will have advertising effects and broaden the customer base, copyright protection measures such as DRM should be kept moderate.

5203

Close to A	Closer to A than B	Neutral	Closer to B than A	Close to B
1	2	3	4	5

(3) Operating expenses

Enter the amount of advertising expenses for your company's content production business and the breakdown percentages in whole numbers.

< FY2011 >

Category	million yen			
Advertising expenses for your company's content production business	5301			

(Note) Enter the percentage based on "Advertising expenses for your company's content production business" as 100%.

< FY2011 >

		Sales promotion expenses (incl. events)	Media advertising expenses	TV commercials	Newspapers and magazines	Net advertisement	Transit advertisement	Outdoor advertisement	Other
Breakdown percentages	5302	%	%	%	%	%	%	%	%

(Note) The sum of "Sales promotion expenses," "Media advertising expenses," and "Other" should be 100%.

(4) Status of Businesses Outsourcing

① Circle the applicable number regarding your company's implementation status of outsourcing for the content production business.

- 5401 1. Implemented outsourcing in FY2011 ⇒ Enter ② and ③
 2. Did not implement outsourcing ⇒ Go to (5)

(Note) Even if part of work related to contents production was outsourced, "Implemented outsourcing" is applicable.

② Enter the cost of your company's outsourcing of content production. Out of the total, also enter the percentage of outsourcing partners that your company has had transactions with for a long period of time and the percentage of completely outsourced work in whole numbers.

< FY2011 >

Category		Outsourcing cost			Percentage of long-term outsourcing partners	Percentage of completely outsourced work
		million yen				
Outsourcing of content production	5402				%	%
Overseas	5403				%	%

③ Enter the number of outsourced projects, products, and contents, and the percentage of sales-based payment (in whole numbers).

< FY2011 >

		Number	Percentage of sales-based payment
Number of outsourced projects, products and contents	5404		%

(Note) "Sales-based payment" refers to a payment method based on the sales and profits of the orderer, apart from methods such as fixed payment or purchase at a fixed amount.

(5) Workers

Enter the number of workers engaged in your company's content production business. Also enter the total number of newly hired full-time workers, the number of new graduates among them, and the number of resignees; and the total number of newly hired contract workers, the number of new graduates among them, and the number of those with cancelled contracts in FY2011.

(person)

Content production section		Number of workers (As of the end of FY2011)	Newly hired full-time workers and contract workers (FY2011)		Resignees and those with cancelled contracts (FY2011)
				New graduates	
Regular workers (excl. temporary or daily workers)	5501				
Full-time workers (excl. workers transferred to other companies)	5502				
Part-timers	5503				
Workers transferred to other companies	5504				
Contract workers (incl. freelancers)	5505				
Temporary or daily workers	5506				
Dispatched workers	5507				

(Note 1) For "Regular workers," enter the total number of paid directors and regularly employed persons (persons, regardless of their titles as full-time, part-time, temporary or contract workers, employed under a contract longer than one month, or persons employed for 18 days or more each month in the two months prior to the end of the financial year).

(Note 2) For "Full-time workers," enter the number of regular workers generally referred to as full-time workers.

(Note 3) For "Part-timers," enter the number of regular workers whose scheduled daily working hours or the number of working days in a week are shorter than full-time workers.

(Note 4) For "Workers transferred to other companies, etc.," enter the number of workers transferred to subsidiaries and affiliates, and whose salaries are paid mainly by your company.

(Note 5) "Contract workers" refers to regular workers engaged in work under a terminable employment contract and does not include part-timers. A "freelancer" refers to a person who neither belongs to nor is under an exclusive contract with any specific company but concludes a contract each time for each work.

(Note 6) "Temporary or daily workers" refer to persons who are employed for a period of up to one month, or those who are brought in on a daily basis.

(Note 7) "Dispatched workers" refer to workers who are employed by a worker dispatching business operator and are engaged in your company's operations under your company's supervision and command, based on a contract between your company and the worker dispatching business operator concerned, under the aforementioned employment relationship.

(6) Wage system

Circle the applicable number regarding your company's wage system for the content production section.

- 5601 Full-time workers
1. Only the seniority system
 2. Mainly the seniority system (partially in accordance with performance)
 3. Mainly the performance-based system (partially based on the seniority system)
 4. Only the performance-based system

- 5602 Contract workers (incl. freelancers)
1. Only the seniority system
 2. Mainly the seniority system (partially in accordance with performance)
 3. Mainly the performance-based system (partially based on the seniority system)
 4. Only the performance-based system

(7) Wages (annual income)

Enter information on wages of workers in the content production section who are 35 years of age. If there are no 35-year old workers, enter information of those around that age.

① Enter the average annual income.

< FY2011 >

Average annual income of 35-year old workers		10 thousand yen		
Full-time workers	5701			
Contract workers (incl. freelancers)	5702			

② How many times the average income is the income of the 35-year old worker with the highest annual income? Circle the applicable number.

- 5703 Full-time workers
1. From 1 to 1.5 times the average
 2. From over 1.5 times to 2 times
 3. From over 2 times to 3 times
 4. From over 3 times to 4 times
 5. Over 4 times

- 5704 Contract workers (incl. freelancers)
1. From 1 to 1.5 times the average
 2. From over 1.5 times to 2 times
 3. From over 2 times to 3 times
 4. From over 3 times to 4 times
 5. Over 4 times

(8) Human resource development

Circle all applicable numbers regarding your company's human resource development in the content production section. (Multiple answers allowed)

- 5801
1. OJT (Guidance and training on the job)
 2. Provide in-house training
 3. Utilize external training sessions, and courses at universities or professional schools (incl. assistance for schooling)
 4. Provide assistance for taking various tests and grant qualification allowances
 5. Other means
 6. Nothing

(9) Documentation

Circle the applicable number that is close to your company's policy on the documentation and compilation of a database.

① Is your company promoting the documentation and compilation of a database concerning content production? Circle the applicable number.

	Yes	To some extent	Neutral	Not really	No
5901	1	2	3	4	5

② If so, does your company use documents and a database that it made in the past? Circle the applicable number.

	Yes	To some extent	Neutral	Not really	No
5902	1	2	3	4	5

6 Situation of the Video Picture and Music Production Section

○ Is your company engaged in the video picture and music production business? Circle the applicable number.

"Video picture and music production" refers to the production of motion pictures, DVDs (videos), animation, and CDs (records).

6001	1. Yes	2. No	→ You do not need to answer any more questions. Thank you for your cooperation.
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Enter the number of regular workers (excluding temporary or daily workers) of the section by location of your business offices (including cases where a company has only one business office).
When your company has multiple offices, enter information for the five offices with the largest number of regular workers.

< As of the end of FY2011 >

	Prefecture	Municipality	Zip code (7 digits)	Regular workers in the section
6002			〒	
6003			〒	
6004			〒	
6005			〒	
6006			〒	