

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

**2013 Basic Survey on the Information and
Communications Industry
(Performance in FY2012)**

October 29, 2013

**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 2013 Basic Survey on the Information and Communications Industry

Points

- The number of companies engaged in the information and communications business was 5,294, out of which 4,557 companies were operating this as their main business.
- The total sales of these 5,294 companies from the information and communications business were 41.6768 trillion yen. The total sales of the 4,557 companies mainly engaged in this business were 39.1252 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 5,294 and the total sales from this business were 41.6768 trillion yen (the total sales of these 5,294 companies were 65.8616 trillion yen) in FY2012. Sales from this business for companies that responded to the survey for the second consecutive year were 40.3410 trillion yen (up 2.7% compared to the previous fiscal year). Sales that are associated with information and communications business were the largest for the telecommunications business, followed by software, and data processing and information services. These three businesses accounted for 78.7% of the total.

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

→ p.3, p.18

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 4,557 and their total sales in FY2012 were 42.7021 trillion yen (sales from this business were 39.1252 trillion yen).

The sales per IC company were 9.37 billion yen (up 4.2%). The sales per IC company were the largest for telecommunications companies, followed by newspaper publishers and the private broadcasting companies.

Chapter 2: Telecommunications and Broadcasting Business

→ p.4, p.25

The number of companies engaged in the telecommunications and broadcasting business was 1,034 and the total sales in FY2012 were 15.9700 trillion yen. Sales by companies that responded to the survey for the second consecutive year were 15.2982 trillion yen (down 0.6%). By business type, sales were 12.9545 trillion yen for the telecommunications business, 1.9250 trillion yen for the private broadcasting business, and 430.0 billion yen for the cable television broadcasting business.

Chapter 3: Broadcast Program Production Business

→ p.5, p.31

The number of companies engaged in the broadcast program production business was 372 and the total sales in FY2012 were 324.1 billion yen. Sales by companies that responded to the survey for the second consecutive year were 199.6 billion yen (up 9.0%).

The sales per company were 870 million yen (down 9.2%).

Chapter 4: Internet Based Service Business

→ p.6, p.35

The number of companies engaged in the Internet based service business was 541. The total sales in FY2012 were 1.4009 trillion yen (down 5.9%), for the second consecutive year of increase. Sales by companies that responded to the survey for the second consecutive year were 1.1884 trillion yen (down 0.6%).

The sales per company were 2.59 billion yen (down 5.9%).

Chapter 5: Information Service Business

→ p.7, p.39

The number of companies engaged in the information service business was 3,329. The total sales in FY2012 were 13.8887 trillion yen (up 2.0%), for the third consecutive year of increase. Sales by companies that responded to the survey for the second consecutive year were 12.9382 trillion yen (up 3.4%). By sector, custom software service companies accounted for the majority.

The sales per company were 4.17 billion yen (up 5.3%), for the third consecutive year of increase.

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

→ p.8, p.45

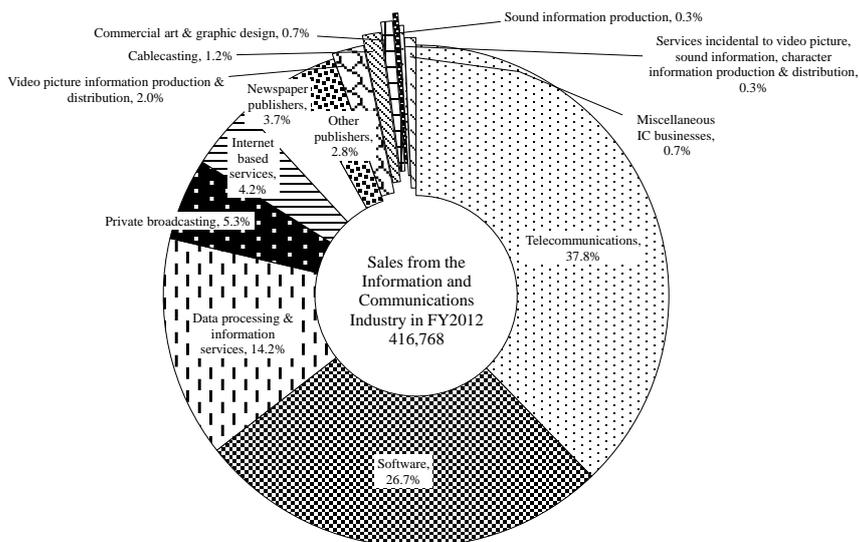
The number of companies engaged in the video picture, sound information, character information production and distribution business was 698. The total sales in FY2012 were 2.8609 trillion yen (up 7.5%), for the third consecutive year of increase. Sales by companies that responded to the survey for the second consecutive year were 2.2981 trillion yen (up 0.8%). By sector, newspaper publishers accounted for the majority.

The sales per company were 4.1 billion yen (down 0.7%) and decreased for service companies incidental to video picture, sound information, character information production and distribution.

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

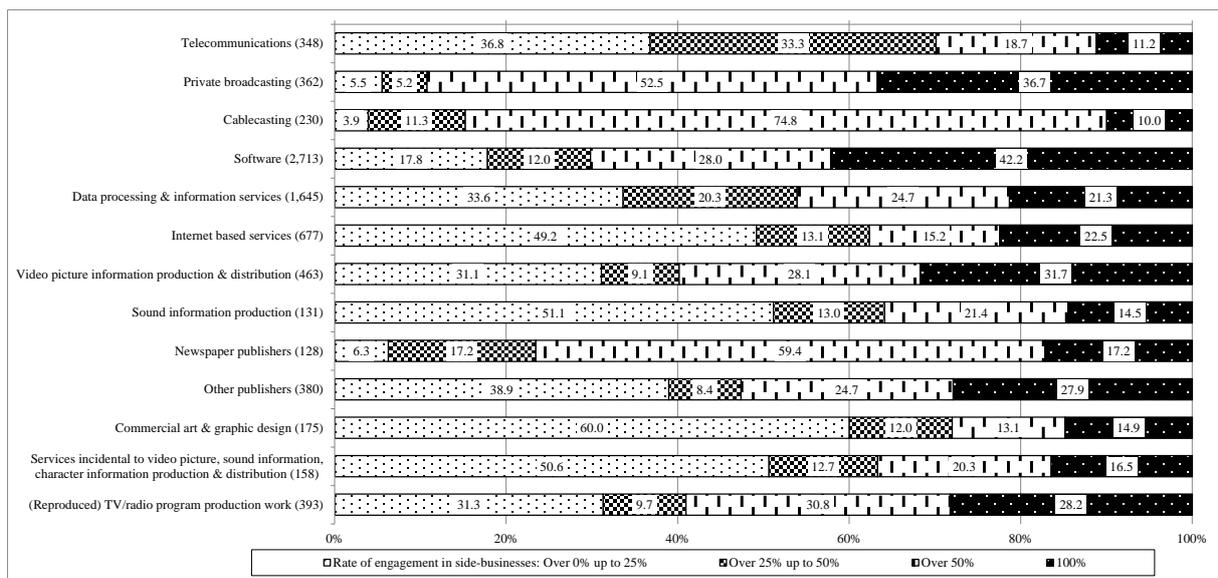
- The total number of companies engaged in the information and communications business (meaning companies that engage in this business, whether as their main business or not) was 5,294 and the total sales from this business were 41.6768 trillion yen (the total sales of these 5,294 companies were 65.8616 trillion yen) in FY2012.
- 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 78.7% 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, 90.0% of cablecasting companies, and 88.8% of telecommunication companies were engaged in side-businesses.

Sales from the Information and Communications Business in FY2012



	Number of companies	Sales from the relevant business Sales (100 million yen)	Composition ratio (%)
Overall	5,294	416,768	100.0
Telecommunications	348	157,446	37.8
Software	2,713	111,155	26.7
Data processing & information services	1,645	59,340	14.2
Private broadcasting	362	21,976	5.3
Internet based services	677	17,623	4.2
Newspaper publishers	128	15,456	3.7
Other publishers	380	11,742	2.8
Video picture information production & distribution	463	8,506	2.0
Cablecasting	230	4,929	1.2
Commercial art & graphic design	175	3,124	0.7
Sound information production	131	1,330	0.3
Services incidental to video picture, sound information, character information production & distribution	158	1,144	0.3
Miscellaneous IC businesses	-	2,998	0.7

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

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

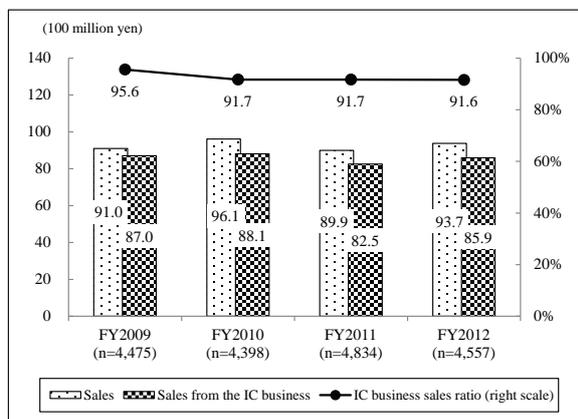
- Looking at companies rated as information and communications companies (IC companies) (meaning companies for which their sales from the information and communications business are rated as being the largest), per IC company, the number of establishments was 3.5 (0.0 points difference), the number of regular workers was 223 (down 1.3%).
- The sales per IC company were 9.37 billion yen (up 4.2%). Of the total sales, those from the information and communications business were 8.59 billion yen (up 4.1%), making up 91.6% of sales (down 0.1 points).
- The operating profit per IC company was 920 million yen (up 17.5%), and ordinary profit per IC company was 890 million yen (up 10.8%). Current net income per IC company was 470 million yen (up 6.2%).

Outline (Per Company)

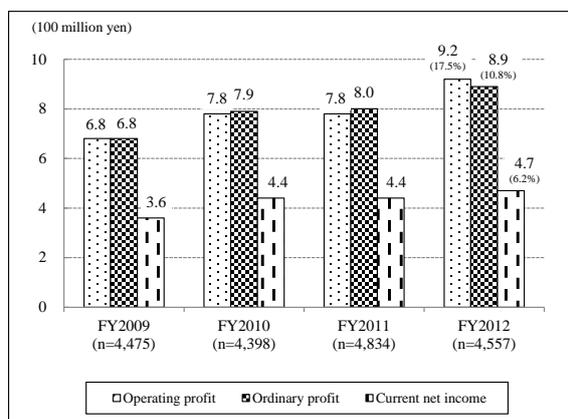
		Number of establishments	Number of workers (persons)	Number of regular workers (persons)	Sales		Operating profit (million yen)	Ordinary profit (million yen)
					(million yen)	Sales from the IC business (million yen)		
Total	FY2011	4.4	266	264	11451.0	7560.5	730.4	741.4
	FY2012	4.4	272	270	12440.8	7872.5	865.9	840.5
	Year-on-year (%)	0.0	2.3	2.3	8.6	4.1	18.6	13.4
IC companies	FY2011	3.5	226	226	8992.5	8249.8	778.5	801.5
	FY2012	3.5	224	223	9370.7	8585.7	915.1	887.9
	Year-on-year (%)	0.0	-0.9	-1.3	4.2	4.1	17.5	10.8
Telecommunications	FY2011	5.9	851	848	120456.4	114447.2	14896.3	15437.8
	FY2012	7.2	742	736	141900.8	134386.8	18241.2	19466.1
	Year-on-year (%)	1.3	-12.8	-13.2	17.8	17.4	22.5	26.1
Private broadcasting	FY2011	2.8	84	82	6953.4	6718.1	429.9	479.4
	FY2012	2.8	85	84	7347.6	7120.8	458.3	470.1
	Year-on-year (%)	0.0	1.2	2.4	5.7	6.0	6.6	-1.9
Cablecasting	FY2011	2.5	81	81	3990.1	3613.3	489.4	358.4
	FY2012	2.4	67	67	2859.5	2826.4	540.9	262.4
	Year-on-year (%)	-0.1	-17.3	-17.3	-28.3	-21.8	10.5	-26.8
Software	FY2011	2.8	240	239	5422.3	4705.9	291.2	297.6
	FY2012	2.8	244	244	5866.5	5125.2	364.9	370.1
	Year-on-year (%)	0.0	1.7	2.1	8.2	8.9	25.3	24.4
Data processing & information services	FY2011	4.5	295	294	6384.6	5676.5	398.0	406.1
	FY2012	4.3	310	309	6803.2	6002.5	444.2	464.3
	Year-on-year (%)	-0.2	5.1	5.1	6.6	5.7	11.6	14.3
Internet based services	FY2011	2.3	145	144	5039.4	4796.0	763.0	753.1
	FY2012	2.3	143	143	5154.4	4824.1	815.0	840.5
	Year-on-year (%)	0.0	-1.4	-0.7	2.3	0.6	6.8	11.6
Video picture information production & distribution	FY2011	1.7	72	69	2605.0	2279.4	158.0	180.7
	FY2012	1.8	80	78	2913.4	2597.2	209.1	243.5
	Year-on-year (%)	0.1	11.1	13.0	11.8	13.9	32.3	34.8
TV program production	FY2011	1.5	64	63	1984.8	1819.9	101.4	112.9
	FY2012	1.6	75	74	2224.4	2091.6	102.1	123.1
	Year-on-year (%)	0.1	17.2	17.5	12.1	14.9	0.7	9.0
Sound information production	FY2011	1.8	56	55	6561.1	6007.7	541.7	539.0
	FY2012	1.4	32	32	3537.8	3092.2	275.1	260.3
	Year-on-year (%)	-0.4	-42.9	-41.8	-46.1	-48.5	-49.2	-51.7
Radio program production	FY2011	1.4	21	20	298.4	298.2	15.7	11.3
	FY2012	1.2	14	14	190.6	173.1	4.0	4.5
	Year-on-year (%)	-0.2	-33.3	-30.0	-36.1	-42.0	-74.5	-60.2
Newspaper publishers	FY2011	17.5	355	349	15032.4	13548.3	463.2	540.0
	FY2012	18.7	378	371	16599.2	14871.5	3112.6	546.1
	Year-on-year (%)	1.2	6.5	6.3	10.4	9.8	572.0	1.1
Other publishers	FY2011	4.1	160	160	7559.6	7383.5	552.5	605.6
	FY2012	3.4	133	132	5735.7	5510.9	161.8	231.8
	Year-on-year (%)	-0.7	-16.9	-17.5	-24.1	-25.4	-70.7	-61.7
Commercial art & graphic design	FY2011	2.1	47	46	1208.8	1167.6	54.9	56.4
	FY2012	1.8	50	50	1515.3	1448.9	69.9	73.7
	Year-on-year (%)	-0.3	6.4	8.7	25.4	24.1	27.3	30.7
Services incidental to video picture, sound information, character information production & distribution	FY2011	3.6	92	91	1911.9	1537.3	38.8	49.7
	FY2012	3.4	74	74	1505.3	1289.4	31.2	47.9
	Year-on-year (%)	-0.2	-19.6	-18.7	-21.3	-16.1	-19.6	-3.6

(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 15.9700 trillion yen in FY2012. Among this, sales by companies that responded to the survey for the second consecutive year were 15.2982 trillion yen (down 0.6%). Looking at sales in FY2012 by business type, sales were 12.9545 trillion yen for the telecommunications business, 1.9250 trillion yen for the private broadcasting business, and 430.0 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 FTTH service were 23.6% and 37.0% respectively. Private broadcasting businesses intending to start internet advertising were high at 21.2%.

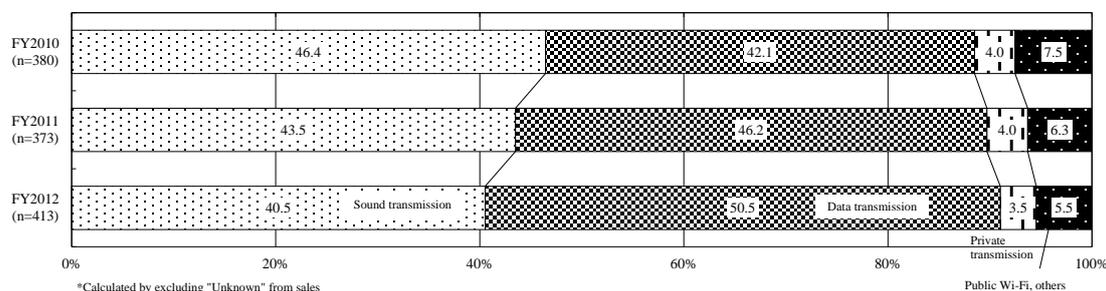
Sales of Telecommunications and Broadcasting Business

(unit: companies, 100 million yen)

Classification	FY2012		Companies that responded to the survey for the second consecutive year				
	Number of companies	Sales	FY2011		FY2012		Year-on-year (%)
			Number of companies	Sales	Number of companies	Sales	
Overall	1,034	159,700	730	153,947	730	152,982	-0.6
Telecommunications	413	129,545	263	125,799	263	125,743	0.0
Broadcasting	621	30,155	467	28,147	467	27,239	-3.2
Private broadcasting	402	19,250	301	17,415	301	17,012	-2.3
Cable television broadcasting	218	4,300	165	3,735	165	3,623	-3.0
NHK	1	6,604	1	6,997	1	6,604	-5.6

*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)

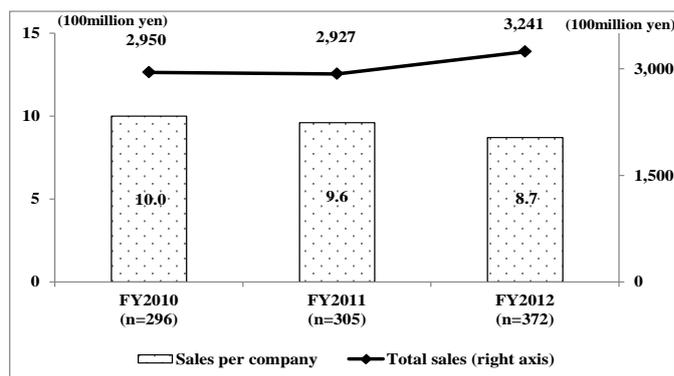
Telecommunications		Private broadcasting		Cable television broadcasting				
New businesses that companies intend to start within one year	FY2011 (n=151)	FY2012 (n=165)	New businesses that companies intend to start within one year	FY2011 (n=99)	FY2012 (n=113)	New businesses that companies intend to start within one year	FY2011 (n=101)	FY2012 (n=100)
FTTH services	25.8	23.6	Internet advertising	28.3	21.2	FTTH services	38.6	37.0
Cloud computing services	19.9	16.4	Web contents delivery	25.3	17.7	Wireless Internet access	38.6	20.0
Wireless Internet access	29.1	15.8	Of which, IPTV services (Internet video delivery)	9.1	7.1	Web contents delivery	13.9	17.0
Other Internet based services	17.9	13.3	Other Internet based services	9.1	15.0	Of which, IPTV services (Internet video delivery)	9.9	13.0
Web contents delivery	9.9	13.3	Internet mail order services	16.2	9.7	Other Internet based services	13.9	11.0
Of which, IPTV services (Internet video delivery)	6.0	7.9	Operation of an Internet shopping site	12.1	8.0	Cable Internet	11.9	11.0
Information network and security services	6.6	9.1	Production of digital contents other than Web sites	11.1	8.0	Of which, IPTV services (Internet video delivery)	9.9	10.0
Information and telecommunications equipment sales	7.3	7.9	Provision of digital contents other than Web sites	9.1	8.0	Information network and security services	2.0	9.0
Server management consignment	6.6	7.9	Cable Internet	6.1	8.0	Cloud computing services	4.0	5.0
Software services	4.0	7.3	Of which, IPTV services (Internet video delivery)	5.1	7.1	Information and telecommunications equipment sales	4.0	5.0
Equipment maintenance, repair, and management	4.6	6.7	Electronic bulletin board services, blog services, and SNS operation	8.1	6.2	Internet mail order services	7.9	4.0
Data processing and information services	4.0	6.7	Consulting	7.1	6.2	Operation of an Internet shopping site	7.9	4.0
Cable Internet	7.3	6.1	FTTH services	1.0	4.4	Other	16.8	21.0
Of which, IPTV services (Internet video delivery)	6.0	6.1	Other	23.2	28.3			
Other	13.2	17.0						

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

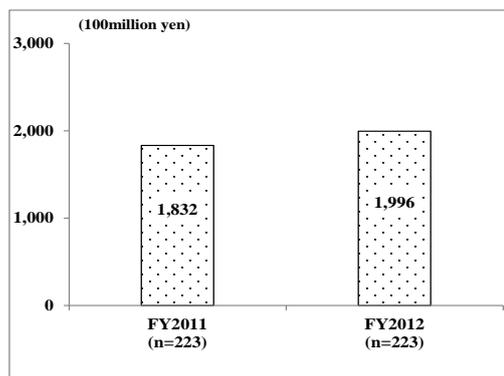
Points of Chapter 3: Broadcast Program production

- The total sales in FY2012 were 324.1 billion yen, among which the total sales by companies that responded to the survey for the second consecutive year were 199.6 billion yen (up 9.0%). The sales per company were 870 million yen (down 9.2%)
- 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 85.2% (up 6.5 points).
- The rate of digitalization of instruments used for broadcast program production exceeded 90% for cameras and editing machines. VTRs also accounted for over 80% of digitalization.

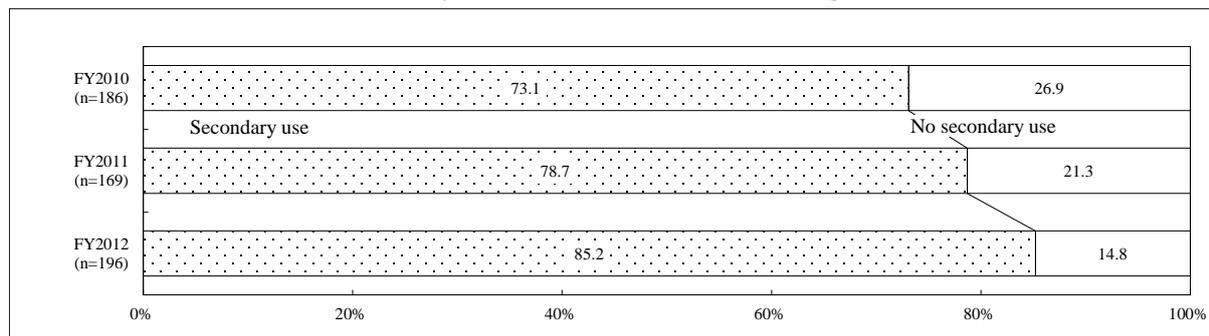
Changes in Sales in the Broadcast Program Production Business



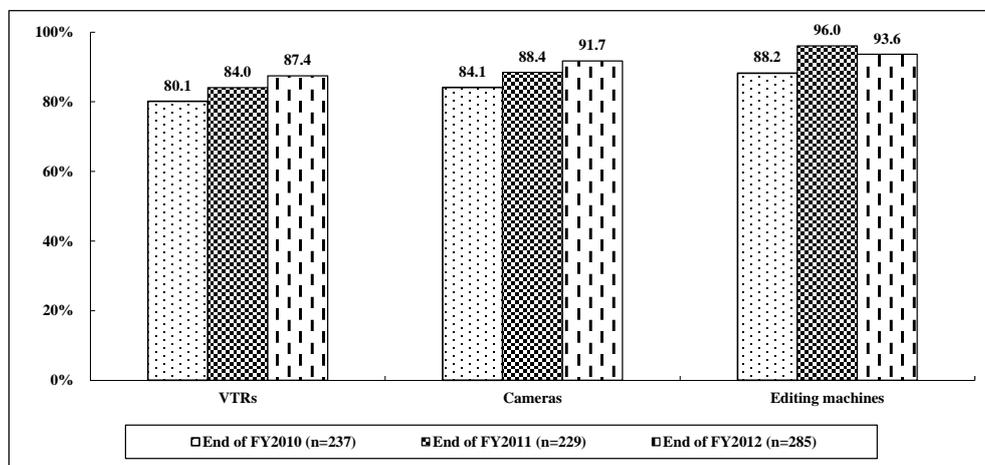
Changes in Sales of Companies that Responded to the Survey for the Second Consecutive Year



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 FY2012 were 1,400.9 trillion yen (down 5.9%). The sales per company were 2.59 billion yen (down 5.9%).
- Looking at sales per company by service type, sales were the largest for electronic bulletin board services, blog services, and SNS operation, followed by charging/settlement agent services and other Internet based services.
- Regarding new business fields that companies intend to start within one year, the most common answer was "Other internet based services," followed by "Cloud computing services," and "Web contents delivery."

Number of Companies and Sales by Service Type

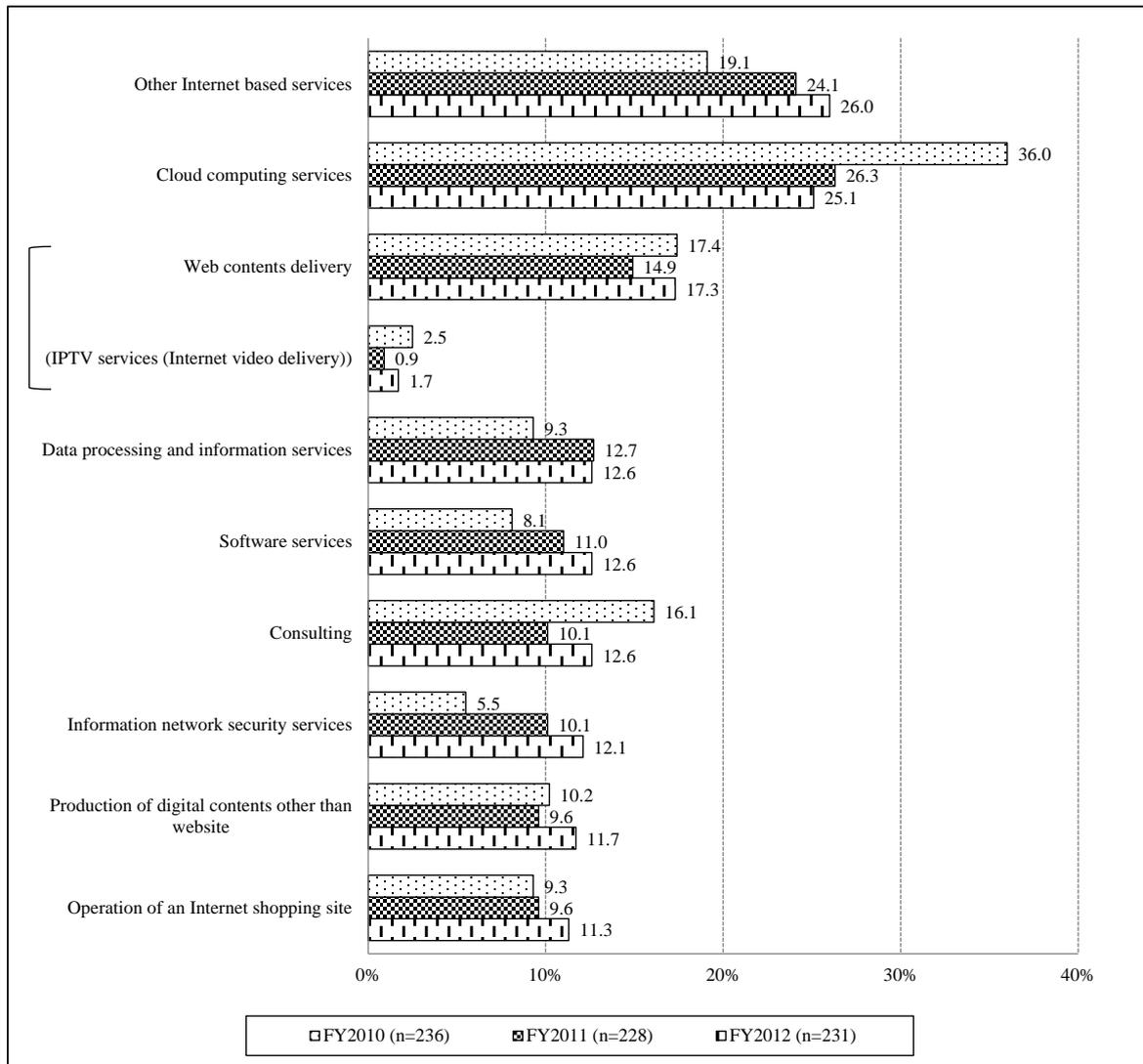
	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)
Total	541	541	0.0	1,489,504	1,400,920	-5.9	2,753.2	2,589.5	-5.9
Web information search services	57	64	12.3	101,577	140,374	38.2	1,782.1	2,193.3	23.1
Shopping site operation and auction site operation	72	80	11.1	157,343	178,270	13.3	2,185.3	2,228.4	2.0
Electronic bulletin board services, blog services, and SNS operation	21	22	4.8	169,835	166,691	-1.9	8,087.4	7,576.9	-6.3
Web contents delivery services	153	152	-0.7	205,904	233,647	13.5	1,345.8	1,537.2	14.2
Revenue from IPTV services	11	13	18.2	5,465	6,694	22.5	496.8	514.9	3.6
Cloud computing services	117	119	1.7	76,160	80,092	5.2	650.9	673.0	3.4
Electronic authentication services	13	13	0.0	12,228	11,804	-3.5	940.6	908.0	-3.5
Information network security services	59	59	0.0	41,399	55,728	34.6	701.7	944.5	34.6
Charging/settlement agent services	16	21	31.3	121,386	126,601	4.3	7,586.6	6,028.6	-20.5
Server management consignment	112	101	-9.8	44,194	49,844	12.8	394.6	493.5	25.1
Other Internet based services	170	157	-7.6	428,245	350,612	-18.1	2,519.1	2,233.2	-11.3
(Special tabulation) Companies that responded to the survey for the second consecutive year	395	395	-	1,195,266	1,188,383	-0.6	3,026.0	3,008.6	-0.6

(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)



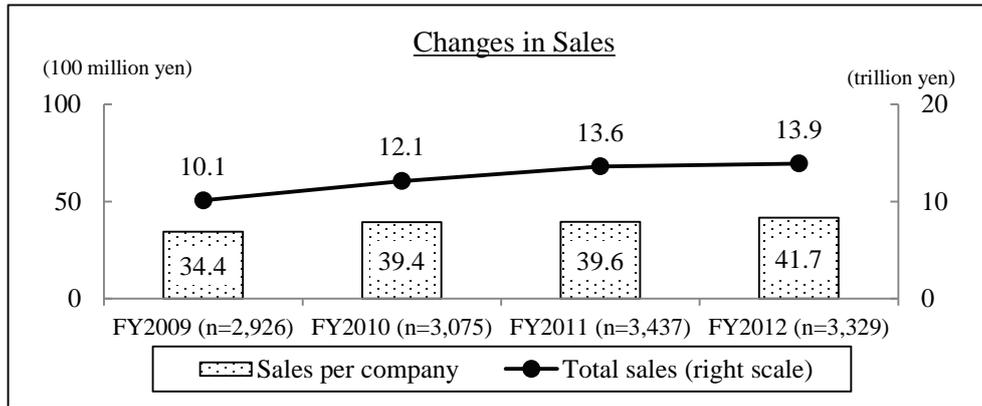
(Notes) Figures are obtained by dividing the number of responses by the number of companies that provided positive responses to this question.

Points of Chapter 5: Information Services

- The total sales in FY2012 were 13.8887 trillion yen (up 2.0%), for the third 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 4.17 billion yen (up 5.3%), with increases by game software service companies, custom 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 third consecutive year. By capital, the percentage of primary contractors increased, and the percentage of subcontractors decreased as capital was larger.

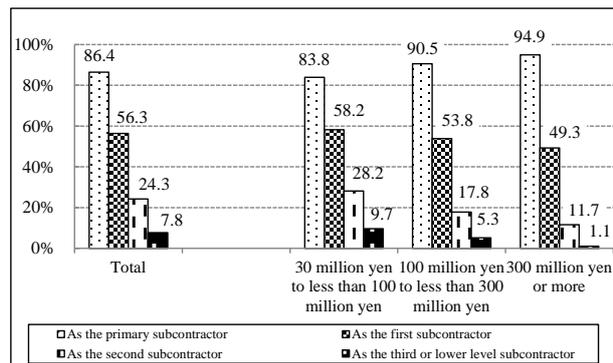
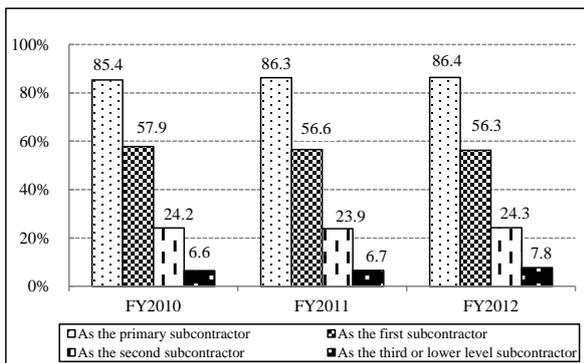
Number of Companies and Sales by Sector (Based on Companies' Main Business)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)
Total	3,437	3,329	-3.1	13,622,118	13,888,689	2.0	3,963.4	4,172.0	5.3
Custom software service companies	1,702	1,626	-4.5	6,627,421	6,887,830	3.9	3,893.9	4,236.1	8.8
Embedded software service companies	117	107	-8.5	193,975	180,682	-6.9	1,657.9	1,688.6	1.9
Package software service companies	270	274	1.5	348,249	360,896	3.6	1,289.8	1,317.1	2.1
Game software service companies	63	60	-4.8	297,005	478,029	60.9	4,714.4	7,967.2	69.0
Data processing service companies	641	637	-0.6	3,019,653	2,884,841	-4.5	4,710.8	4,528.8	-3.9
Research & information service companies	146	116	-20.5	278,648	216,443	-22.3	1,908.5	1,865.9	-2.2
Miscellaneous information service companies	498	509	2.2	2,857,167	2,879,968	0.8	5,737.3	5,658.1	-1.4
(Special tabulation) Companies that responded to the survey for the second consecutive year	2,835	2,835	-	12,511,351	12,938,209	3.4	4,413.2	4,563.7	3.4



Primary Contractors and Subcontractors

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



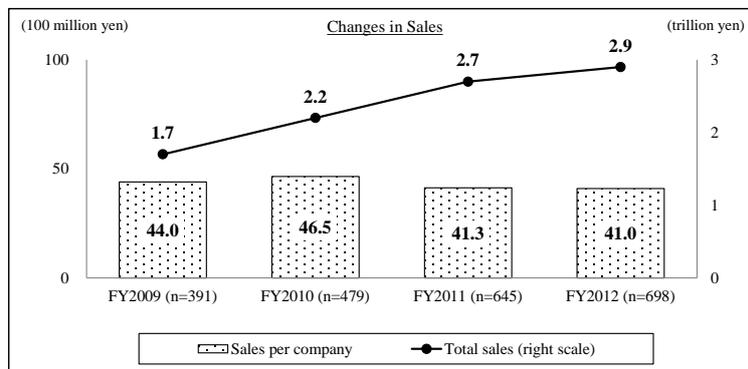
(Note) Multiple answers were allowed for implementation of primary contractors and subcontractors; numbers are counted using the number of companies for which there were valid responses.

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

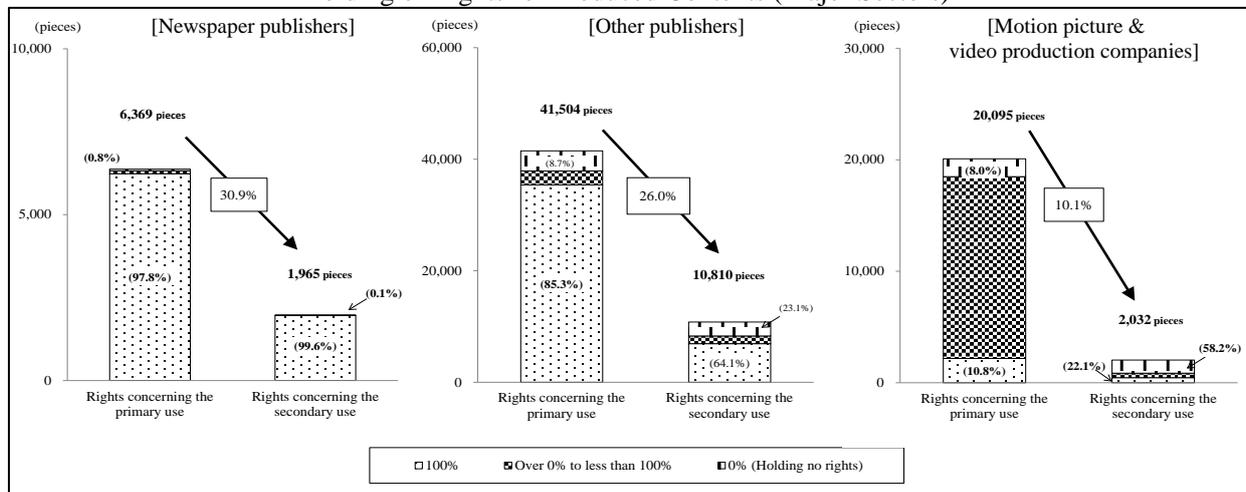
- The total sales in FY2012 were 2.8609 trillion yen (up 7.5%), for the third consecutive year of increase. The sales were the largest for newspaper publishers, followed by other publishers, and commercial art and graphic design companies.
- The sales per company were 4.1 billion yen (down 0.7%) and decreased for service companies incidental to video picture, sound information, character information production and distribution, and motion picture and video production companies and others.
- 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 97.8% and the percentage of motion picture & video production companies was low at 10.8%, while the percentage of motion picture & video production companies that held the full rights for secondary use was low at 22.1%.

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

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)
Total	645	698	8.2	2,662,068	2,860,881	7.5	4,127.2	4,098.7	-0.7
Motion picture & video production companies	56	64	14.3	89,052	90,878	2.1	1,590.2	1,420.0	-10.7
Animation production companies	19	24	26.3	46,973	84,283	79.4	2,472.3	3,511.8	42.0
Recording and disk production companies	14	19	35.7	45,047	92,791	106.0	3,217.6	4,883.7	51.8
Newspaper publishers	100	100	0.0	1,024,092	1,016,402	-0.8	10,240.9	10,164.0	-0.8
Other publishers	233	240	3.0	863,854	917,852	6.3	3,707.5	3,824.4	3.2
Commercial art and graphic design companies	119	123	3.4	416,509	431,114	3.5	3,500.1	3,505.0	0.1
Motion picture, video & TV program distribution companies	12	21	75.0	65,050	114,208	75.6	5,420.8	5,438.5	0.3
Service companies incidental to video picture, sound information, character information production & distribution	92	107	16.3	111,491	113,353	1.7	1,211.9	1,059.4	-12.6
(Special tabulation) Companies that responded to the survey for the second consecutive year	527	527	-	2,280,049	2,298,123	0.8	4,326.5	4,360.8	0.8



Holding of Rights for Produced Contents (Major Sectors)



(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 2013 Basic Survey on the Information and Communications Industry as of March 31, 2013, 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 2012 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 FY2012 and sales are the performance of the entirety of FY2012.
- 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 September 2013, and the final report compiled based on all valid responses will be publicized in March 2014.
- 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 2013 Basic Survey on the Information and Communications Industry' (Ministry of Internal Affairs and Communications/Ministry of Economy, Trade and Industry)."

(Collection)

Questionnaire type		Number of target companies	Companies that submitted a response	Response rate	Companies that gave a valid response
Questionnaire (I) (Common Survey)		9,042	6,151	68.0%	5,294
Survey on Items for Each Business Type	(II) (Telecommunications and Broadcasting)	1,453	902	62.1%	795
	(III) (Broadcast Program Production)	856	433	50.6%	372
	(IV) (Internet Based Service)	1,326	741	55.9%	541
	(V) (Information Service)	5,777	3,793	65.7%	3,329
	(VI) (Video Picture, Sound Information, Character Information Production and Distribution)	1,562	859	55.0%	698

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 engage in this business, whether as their main business or not) was 5,294. The total number of establishments was 23,218 and the total number of workers was 1,441,643.
- The total sales from this business were 41.6768 trillion yen (the total sales for these 5,294 companies were 65.8616 trillion yen) in FY2012. Among this, total sales from this business by companies that responded to the survey for the second consecutive year were 40.3410 trillion yen (up 2.7%).
- The operating profit was 4.5840 trillion yen, the ordinary profit was 4.4495 trillion yen, and the number of subsidiaries and affiliated companies owned was 8,040.

Fig. 1-1-1 Overall Outline

		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 relevant business (100 million yen)			
Overall	FY2011	5,592	24,551	1,485,357	1,477,290	640,342	422,784	40,842	41,460	8,187
	FY2012	5,294	23,218	1,441,643	1,431,884	658,616	416,768	45,840	44,495	8,040
	Year-on-year (%)	-5.3	-5.4	-2.9	-3.1	2.9	-1.4	12.2	7.3	-1.8
Telecommunications	FY2011	431	2,223	211,667	211,099	197,750	160,735	23,335	23,588	711
	FY2012	348	2,026	166,989	165,966	188,280	157,446	23,786	24,608	683
	Year-on-year (%)	-19.3	-8.9	-21.1	-21.4	-4.8	-2.0	1.9	4.3	-3.9
Private broadcasting	FY2011	402	1,416	39,610	39,085	28,326	23,201	1,773	2,007	543
	FY2012	362	1,407	38,559	37,991	26,297	21,976	1,737	1,825	514
	Year-on-year (%)	-10.0	-0.6	-2.7	-2.8	-7.2	-5.3	-2.0	-9.1	-5.3
Cablecasting	FY2011	245	615	21,930	21,717	10,839	5,259	1,378	1,079	81
	FY2012	230	563	20,052	20,020	10,555	4,929	1,758	1,165	102
	Year-on-year (%)	-6.1	-8.5	-8.6	-7.8	-2.6	-6.3	27.6	8.0	25.9
Software	FY2011	2,849	10,068	765,053	763,599	193,915	108,483	8,798	9,288	3,348
	FY2012	2,713	9,238	738,774	734,927	194,985	111,155	9,935	10,498	3,283
	Year-on-year (%)	-4.8	-8.2	-3.4	-3.8	0.6	2.5	12.9	13.0	-1.9
Data processing & information services	FY2011	1,734	9,230	563,717	561,100	169,570	56,941	7,359	7,908	2,789
	FY2012	1,645	8,637	579,965	576,509	179,428	59,340	8,051	8,731	2,688
	Year-on-year (%)	-5.1	-6.4	2.9	2.7	5.8	4.2	9.4	10.4	-3.6
Internet based services	FY2011	714	4,460	237,148	235,458	126,999	19,969	4,295	3,402	1,322
	FY2012	677	3,630	199,239	197,756	129,570	17,623	4,092	3,674	1,269
	Year-on-year (%)	-5.2	-18.6	-16.0	-16.0	2.0	-11.7	-4.7	8.0	-4.0
Video picture information production & distribution	FY2011	482	1,361	64,408	63,524	42,658	8,347	2,154	2,264	863
	FY2012	463	1,477	58,348	57,527	28,873	8,506	2,109	1,964	546
	Year-on-year (%)	-3.9	8.5	-9.4	-9.4	-32.3	1.9	-2.1	-13.2	-36.7
Sound information production	FY2011	96	171	8,574	8,475	3,759	1,354	324	337	58
	FY2012	131	236	7,249	7,151	3,477	1,330	250	288	57
	Year-on-year (%)	36.5	38.0	-15.5	-15.6	-7.5	-1.8	-22.8	-14.5	-1.7
Newspaper publishers	FY2011	139	2,216	45,623	44,850	19,027	15,929	584	679	668
	FY2012	128	2,157	43,358	42,580	18,758	15,456	3,385	652	745
	Year-on-year (%)	-7.9	-2.7	-5.0	-5.1	-1.4	-3.0	479.7	-4.0	11.5
Other publishers	FY2011	404	3,373	96,297	95,228	41,676	15,161	2,671	2,938	960
	FY2012	380	3,140	84,738	84,168	34,980	11,742	1,347	1,658	912
	Year-on-year (%)	-5.9	-6.9	-12.0	-11.6	-16.1	-22.6	-49.6	-43.6	-5.0
Commercial art & graphic design	FY2011	169	472	21,101	20,583	18,152	2,864	478	569	266
	FY2012	175	460	25,420	25,062	20,427	3,124	652	756	306
	Year-on-year (%)	3.6	-2.5	20.5	21.8	12.5	9.1	36.3	32.8	15.0
Services incidental to video picture, sound information, character information production & distribution	FY2011	131	451	16,456	16,219	5,916	1,053	450	470	128
	FY2012	158	483	17,262	17,145	5,320	1,144	306	332	152
	Year-on-year (%)	20.6	7.1	4.9	5.7	-10.1	8.7	-32.0	-29.3	18.8
(Reproduced) TV/radio program production work	FY2011	404	823	29,768	29,161	10,729	4,161	735	600	364
	FY2012	393	699	29,700	29,211	13,246	4,082	1,029	876	258
	Year-on-year (%)	-2.7	-15.1	-0.2	0.2	23.5	-1.9	40.0	46.0	-29.1

* "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.)

* The total of the "Sales from the 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		Operating profit (100 million yen)	Ordinary profit (100 million yen)	Number of subsidiaries and affiliated companies owned
						(100 million yen)	Sales from the relevant business (100 million yen)			
Overall	FY2011	4,603	20,858	1,291,840	1,284,738	597,863	392,680	38,076	38,696	7,333
	FY2012	4,603	20,996	1,316,054	1,306,720	622,378	403,410	44,603	42,672	7,287
	Year-on-year (%)	-	0.7	1.9	1.7	4.1	2.7	17.1	10.3	-0.6

2. Sales

- The total sales from the information and communications business were 41.6768 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 78.7% of the total.

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

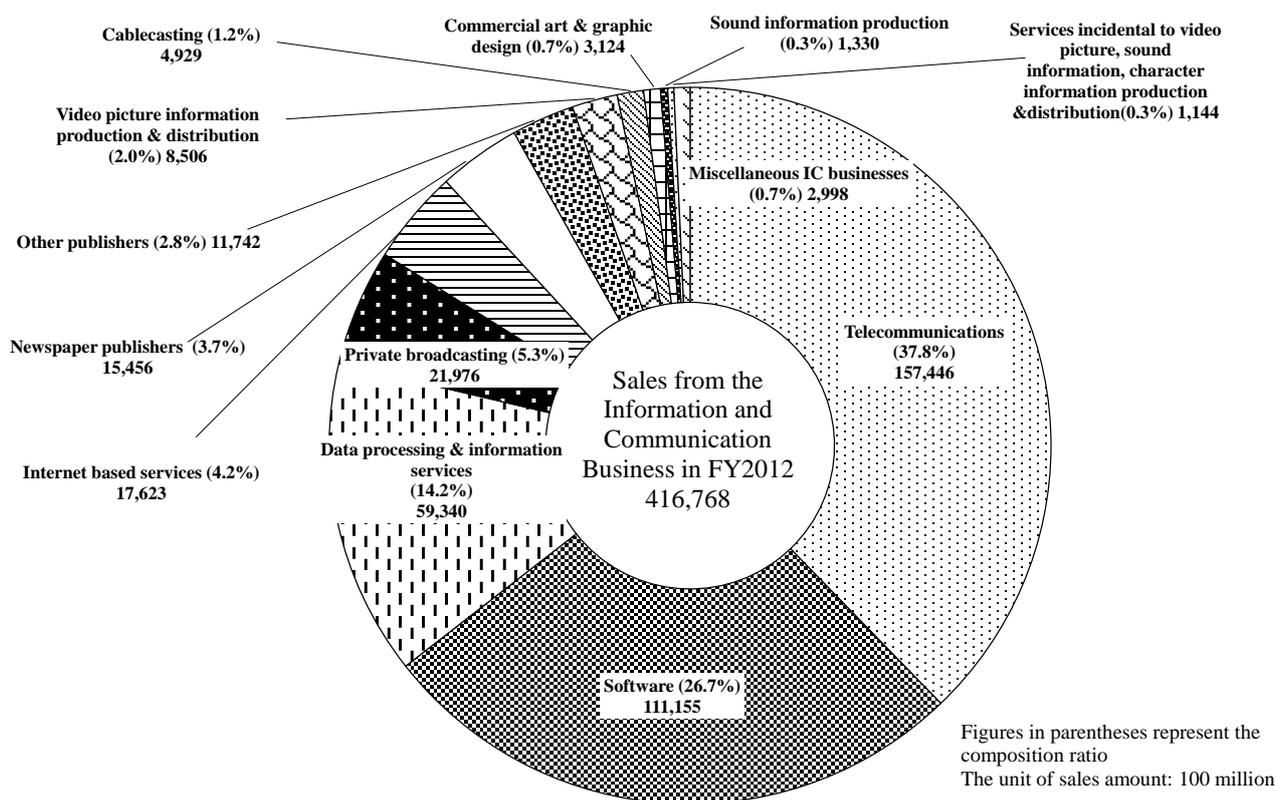


Fig. 1-1-4 Sales of the Information and Communications Business

		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
FY2011	Number of companies	5,592	431	2,849	1,734	402	714	139	404	482	245	169	96	131	-
	Sales from the relevant business	422,784	160,735	108,483	56,941	23,201	19,969	15,929	15,161	8,347	5,259	2,864	1,354	1,053	3,488
	Composition ratio (%)	100.0	38.0	25.7	13.5	5.5	4.7	3.8	3.6	2.0	1.2	0.7	0.3	0.2	0.8
FY2012	Number of companies	5,294	348	2,713	1,645	362	677	128	380	463	230	175	131	158	-
	Sales from the relevant business	416,768	157,446	111,155	59,340	21,976	17,623	15,456	11,742	8,506	4,929	3,124	1,330	1,144	2,998
	Composition ratio (%)	100.0	37.8	26.7	14.2	5.3	4.2	3.7	2.8	2.0	1.2	0.7	0.3	0.3	0.7
Change from the previous year's composition ratio (points)		-	-0.2	1.0	0.8	-0.2	-0.5	-0.1	-0.8	0.1	-0.1	0.1	0.0	0.0	-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 that have information and communication business:

- 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

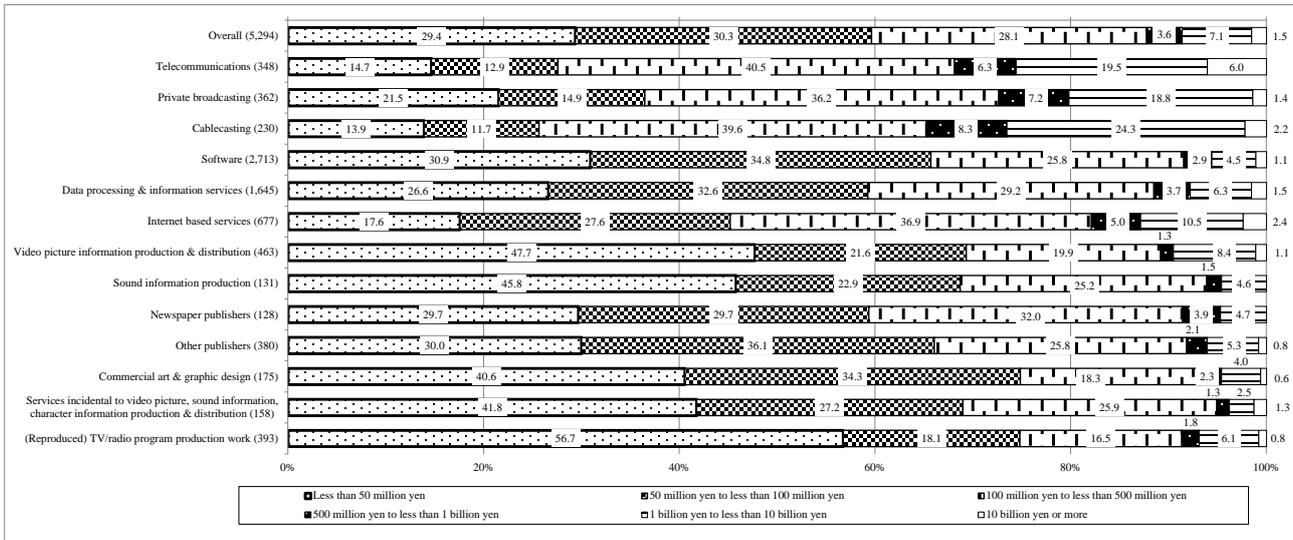


Fig. 1-1-6 Composition Ratios of Companies by Sales

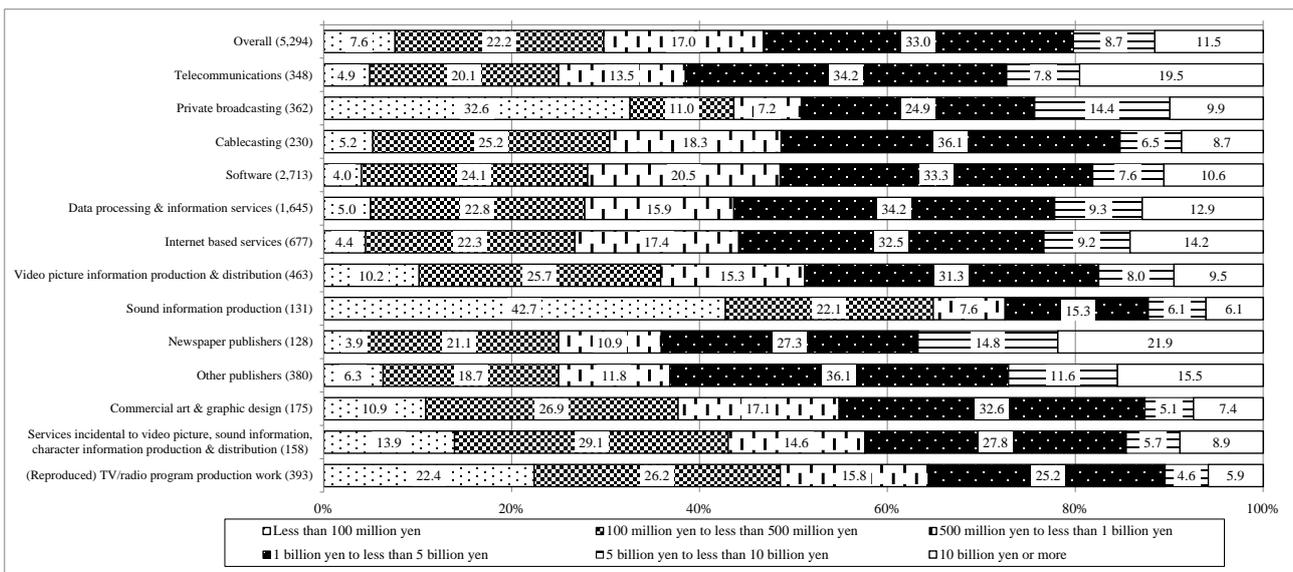


Fig. 1-1-7 Composition Ratios of Companies by Number of Workers

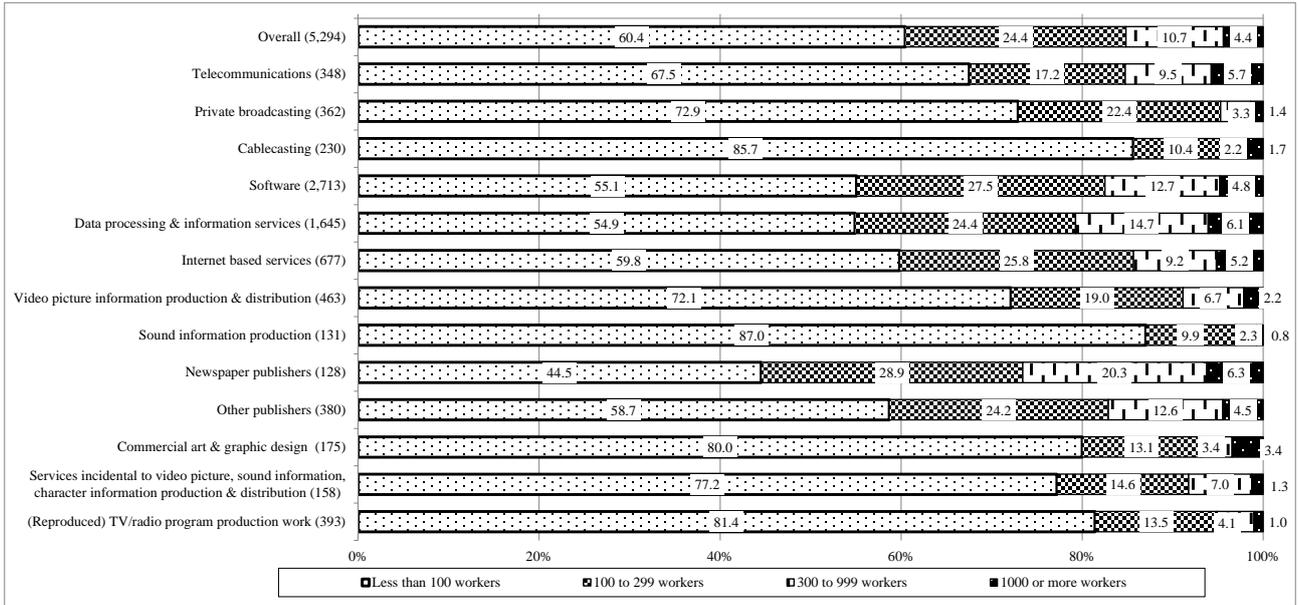
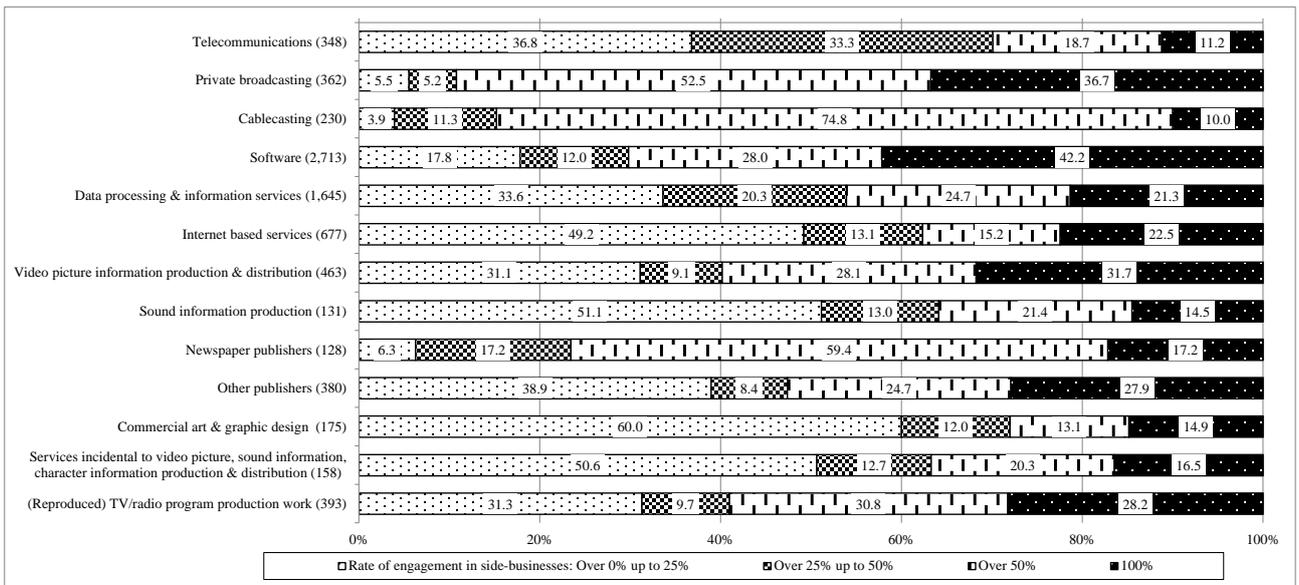


Fig. 1-1-8 Composition Ratios of Companies by Rate of Engagement in Side-Businesses



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 15.33 billion yen and the net assets per company were 6.73 billion yen. The capital adequacy ratio was 43.9%.
- The value added per company was 3.84 billion yen, the labor productivity was 14.112 million yen/person, the labor share was 39.1%, and the labor equipment ratio was 21.118 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 (%)		
	FY2011	FY2012	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Vs. previous fiscal year (times)	FY2011	FY2012	Vs. previous fiscal year (points)
Overall	5,592	5,294	14,396.2	15,332.8	6.5	6,140.2	6,729.8	9.6	0.80	0.81	0.02	42.7	43.9	1.2
Telecommunications	431	348	67,524.5	81,230.7	20.3	37,062.7	45,252.9	22.1	0.68	0.67	-0.01	54.9	55.7	0.8
Private broadcasting	402	362	9,887.3	11,069.6	12.0	7,202.8	8,146.6	13.1	0.71	0.66	-0.06	72.8	73.6	0.7
Cablecasting	245	230	5,518.7	6,640.1	20.3	2,534.5	2,969.3	17.2	0.80	0.69	-0.11	45.9	44.7	-1.2
Software	2,849	2,713	5,827.8	6,001.8	3.0	2,535.9	2,557.6	0.9	1.17	1.20	0.03	43.5	42.6	-0.9
Data processing & information services	1,734	1,645	7,902.8	8,570.1	8.4	3,569.4	3,756.7	5.2	1.24	1.27	0.04	45.2	43.8	-1.3
Internet based services	714	677	32,245.6	33,721.7	4.6	6,667.4	8,128.1	21.9	0.55	0.57	0.02	20.7	24.1	3.4
Video picture information production & distribution	482	463	9,259.1	7,908.2	-14.6	5,530.9	5,137.6	-7.1	0.96	0.79	-0.17	59.7	65.0	5.2
Sound information production	96	131	3,413.3	2,234.1	-34.5	2,107.9	1,366.9	-35.2	1.15	1.19	0.04	61.8	61.2	-0.6
Newspaper publishers	139	128	17,250.0	15,816.9	-8.3	8,343.2	7,892.0	-5.4	0.79	0.93	0.13	48.4	49.9	1.5
Other publishers	404	380	13,715.1	12,924.7	-5.8	8,235.7	8,323.3	1.1	0.75	0.71	-0.04	60.0	64.4	4.3
Commercial art & graphic design	169	175	7,835.2	12,025.9	53.5	3,423.5	5,617.5	64.1	1.37	0.97	-0.40	43.7	46.7	3.0
Services incidental to video picture, sound information, character information production & distribution	131	158	4,181.3	3,358.1	-19.7	2,332.6	1,851.1	-20.6	1.08	1.00	-0.08	55.8	55.1	-0.7
(Reproduced) TV/radio program production work	404	393	2,427.5	3,562.0	46.7	1,306.2	2,255.0	72.6	1.09	0.95	-0.15	53.8	63.3	9.5

(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)		
	FY2011	FY2012	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Vs. previous fiscal year (points)	FY2011	FY2012	Year-on-year (%)
Overall	5,592	5,294	3,737.9	3,842.8	2.8	1,407.2	1,411.2	0.3	40.2	39.1	-1.1	2,058.7	2,111.8	2.6
Telecommunications	431	348	16,742.8	19,467.5	16.3	3,409.2	4,057.0	19.0	17.4	14.0	-3.4	7,103.6	8,903.7	25.3
Private broadcasting	402	362	1,814.8	1,948.3	7.4	1,841.8	1,829.1	-0.7	40.8	41.3	0.5	3,249.4	3,158.8	-2.8
Cablecasting	245	230	1,876.4	2,246.3	19.7	2,096.3	2,576.6	22.9	20.7	18.4	-2.4	3,590.0	4,684.2	30.5
Software	2,849	2,713	2,471.3	2,571.3	4.0	920.3	944.3	2.6	60.9	59.1	-1.8	279.2	284.5	1.9
Data processing & information services	1,734	1,645	3,007.0	3,126.0	4.0	925.0	886.6	-4.1	55.1	55.0	-0.1	422.8	407.5	-3.6
Internet based services	714	677	5,385.7	4,825.9	-10.4	1,621.5	1,639.8	1.1	34.7	35.0	0.3	4,462.0	5,409.7	21.2
Video picture information production & distribution	482	463	1,832.9	1,654.8	-9.7	1,371.6	1,313.1	-4.3	49.3	44.4	-4.9	1,823.5	1,719.6	-5.7
Sound information production	96	131	992.2	635.4	-36.0	1,110.9	1,148.3	3.4	48.6	48.0	-0.6	337.0	535.0	58.8
Newspaper publishers	139	128	4,737.1	6,566.2	38.6	1,443.2	1,938.4	34.3	56.2	37.8	-18.4	2,291.7	2,047.7	-10.6
Other publishers	404	380	3,091.2	2,578.8	-16.6	1,296.9	1,156.4	-10.8	50.3	55.3	4.9	1,481.6	1,609.2	8.6
Commercial art & graphic design	169	175	1,501.6	1,802.7	20.0	1,202.7	1,241.0	3.2	58.6	57.4	-1.1	1,208.0	1,396.2	15.6
Services incidental to video picture, sound information, character information production & distribution	131	158	1,351.5	1,053.7	-22.0	1,075.9	964.4	-10.4	49.8	56.2	6.4	846.3	855.7	1.1
(Reproduced) TV/radio program production work	404	393	783.4	972.9	24.2	1,063.1	1,287.4	21.1	52.2	46.9	-5.3	768.7	1,314.8	71.0

(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 for information and communication business was 1,441,643, out of which full-time workers/regular staff members (hereinafter referred to as “full-time workers”) were 1,210,290. The number of part-timers was 141,636 and that of dispatched workers was 116,354.
- The number of workers per company was 272, out of which 229 were full-time workers and 27 were part-timers.
- The composition ratio of regular workers was 84.5% (down 2.0 points) for full-time workers and 9.9% (up 1.5 points) for part-timers.

Fig. 1-1-11 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	
	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012
	Year-on-year (%)															
Overall	5,592	5,294	1,485,357	1,441,643	1,477,290	1,431,884	1,277,695	1,210,290	124,545	141,636	75,050	79,958	126,434	116,354		
	-5.3		-2.9		-3.1		-5.3		13.7		6.5		-8.0			
Telecommunications	431	348	211,667	166,989	211,099	165,966	169,257	129,708	18,394	13,753	23,448	22,505	25,758	14,174		
Private broadcasting	402	362	39,610	38,559	39,085	37,991	28,052	26,594	7,120	6,767	3,913	4,630	6,293	6,179		
Cablecasting	245	230	21,930	20,052	21,717	20,020	16,408	15,731	1,663	2,054	3,646	2,235	2,548	2,300		
Software	2,849	2,713	765,053	738,774	763,599	734,927	712,674	680,933	31,153	24,186	19,772	29,808	66,113	66,521		
Data processing & information services	1,734	1,645	563,717	579,965	561,100	576,509	468,522	454,245	70,055	97,198	22,523	25,066	56,275	55,420		
Internet based services	714	677	237,148	199,239	235,458	197,756	199,218	173,550	20,212	13,707	16,028	10,499	24,438	20,850		
Video picture information production & distribution	482	463	64,408	58,348	63,524	57,527	50,359	45,242	7,071	7,408	6,094	4,877	4,854	4,329		
Sound information production	96	131	8,574	7,249	8,475	7,151	6,762	6,177	460	536	1,253	438	422	289		
Newspaper publishers	139	128	45,623	43,358	44,850	42,580	40,386	38,259	3,495	3,417	969	904	2,102	1,573		
Other publishers	404	380	96,297	84,738	95,228	84,168	78,076	65,731	13,017	11,801	4,135	6,636	4,280	3,187		
Commercial art & graphic design	169	175	21,101	25,420	20,583	25,062	16,069	19,480	1,929	2,155	2,585	3,427	905	970		
Services incidental to video picture, sound information, character information production & distribution	131	158	16,456	17,262	16,219	17,145	13,414	14,425	1,406	1,296	1,399	1,424	1,502	1,081		
(Reproduced) TV/radio program production work	404	393	29,768	29,700	29,161	29,211	24,611	24,881	1,323	1,521	3,227	2,809	2,195	2,495		

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

Fig. 1-1-12 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	
	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012
	Year-on-year (%)															
Overall	4,603	4,603	1,291,840	1,316,054	1,284,738	1,306,720	1,122,534	1,128,141	99,873	103,772	62,331	74,807	108,523	109,619		
	-		1.9		1.7		0.5		3.9		20.0		-		1.0	

Fig. 1-1-13 Number of Workers per Company

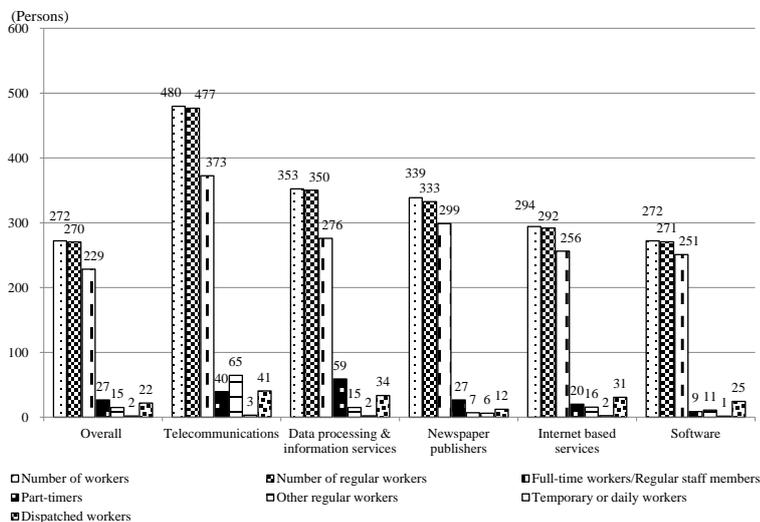
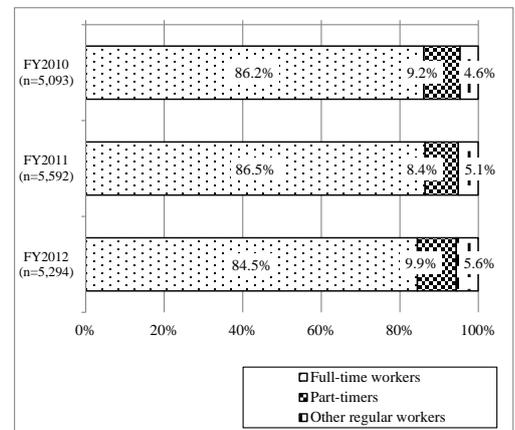


Fig. 1-1-14 Composition Ratio of Regular Workers



6. Ownership of subsidiaries and affiliated companies

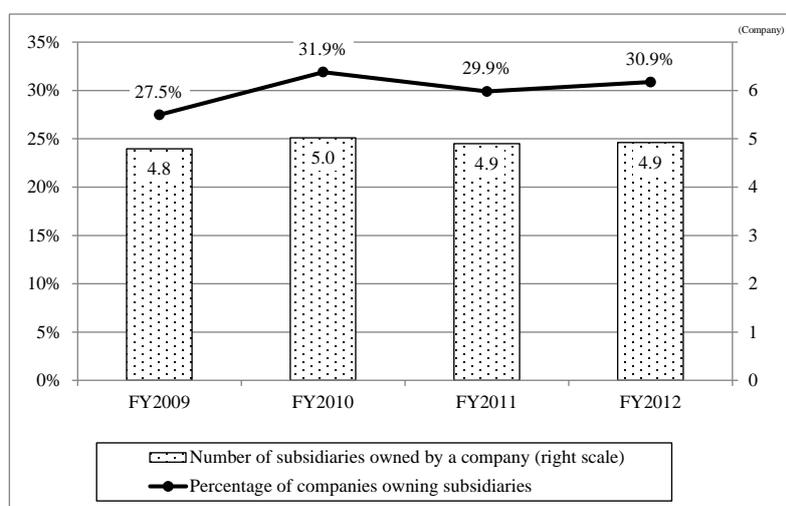
- The number of companies that own subsidiaries* of information and communication companies was 1,634, which own 8,040 subsidiaries.
- The newspaper publishers owned the largest number of subsidiaries per company (10.3), followed by the telecommunications (7.8) and the commercial art and graphic design (7.0).

(*) Subsidiaries include affiliated companies.

Fig. 1-1-15 Ownership of subsidiaries

		Number of companies	Number of companies owning subsidiaries	Percentage of companies that own subsidiaries (%)	Number of subsidiaries	Number of subsidiaries owned per company	Overseas (Unit: 1 company)		
							Number of companies that own overseas subsidiaries (A)	Number of overseas subsidiaries (B)	Number of overseas subsidiaries owned per company (B/A)
Total	FY2011	5,592	1,672	29.9	8,187	4.9	497	2,144	4.3
	FY2012	5,294	1,634	30.9	8,040	4.9	491	2,206	4.5
	Difference from previous year (pt/company)		-5.3%	-2.3%	1.0pt	-1.8%	0.0	-1.2%	2.9%
Telecommunications		348	88	25.3	683	7.8	18	137	7.6
Private broadcasting		362	136	37.6	514	3.8	7	16	2.3
Cablecasting		230	40	17.4	102	2.6	-	-	-
Software		2,713	826	30.4	3,283	4.0	304	1,199	3.9
Data processing & information services		1,645	468	28.4	2,688	5.7	142	864	6.1
Internet based services		677	256	37.8	1,269	5.0	92	300	3.3
Video picture information production & distribution		463	125	27.0	546	4.4	26	61	2.3
Sound information production		131	25	19.1	57	2.3	2	6	3.0
Newspaper publishers		128	72	56.3	745	10.3	6	18	3.0
Other publishers		380	163	42.9	912	5.6	31	88	2.8
Commercial art & graphic design		175	44	25.1	306	7.0	8	127	15.9
Services incidental to video picture, sound information, character information production & distribution		158	40	25.3	152	3.8	9	25	2.8
(Reproduced) TV/radio program production work		393	80	20.4	258	3.2	10	20	2.0

Fig. 1-1-16 Number of subsidiaries owned and percentage of companies owning subsidiaries



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 4,557 (86.1% of total number) in FY2012. The number of establishments was 15,785 and the number of regular workers was 1,014,181.
- The total sales by IC companies were 42.7021 trillion yen (64.8% of total sales), out of which 39.1252 trillion yen were the sales from the information and communications business. The operating profit was 4.1700 trillion yen and the ordinary profit was 4.0460 trillion yen. The number of subsidiaries and affiliated companies owned was 5,568.

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	FY2011	5,592	24,551	1,485,357	1,477,290	640,342	422,784	40,842	41,460	8,187
	FY2012	5,294	23,218	1,441,643	1,431,884	658,616	416,768	45,840	44,495	8,040
	Year-on-year (%)	-5.3	-5.4	-2.9	-3.1	2.9	-1.4	12.2	7.3	-1.8
IC companies	FY2011	4,834	17,091	1,094,358	1,090,074	434,698	398,794	37,633	38,746	5,713
	FY2012	4,557	15,785	1,018,791	1,014,181	427,021	391,252	41,700	40,460	5,568
	Year-on-year (%)	-5.7	-7.6	-6.9	-7.0	-1.8	-1.9	10.8	4.4	-2.6
Telecommunications	FY2011	138	813	117,491	116,983	166,230	157,937	20,557	21,304	320
	FY2012	117	838	86,798	86,105	166,024	157,233	21,342	22,775	332
	Year-on-year (%)	-15.2	3.1	-26.1	-26.4	-0.1	-0.4	3.8	6.9	3.8
Private broadcasting	FY2011	373	1,058	31,155	30,678	25,936	25,059	1,603	1,788	476
	FY2012	332	946	28,335	27,808	24,394	23,641	1,521	1,561	438
	Year-on-year (%)	-11.0	-10.6	-9.1	-9.4	-5.9	-5.7	-5.1	-12.7	-8.0
Cablecasting	FY2011	219	538	17,767	17,710	8,738	7,913	1,072	785	59
	FY2012	202	486	13,598	13,566	5,776	5,709	1,093	530	76
	Year-on-year (%)	-7.8	-9.7	-23.5	-23.4	-33.9	-27.9	2.0	-32.5	28.8
Software	FY2011	2,096	5,948	502,313	501,751	113,651	98,635	6,103	6,238	1,927
	FY2012	1,994	5,592	486,467	485,673	116,978	102,196	7,276	7,380	1,876
	Year-on-year (%)	-4.9	-6.0	-3.2	-3.2	2.9	3.6	19.2	18.3	-2.6
Data processing & information services	FY2011	934	4,157	275,521	274,726	59,632	53,019	3,718	3,793	1,035
	FY2012	851	3,653	263,636	262,545	57,895	51,081	3,780	3,951	984
	Year-on-year (%)	-8.9	-12.1	-4.3	-4.4	-2.9	-3.7	1.7	4.2	-4.9
Internet based services	FY2011	277	634	40,116	39,953	13,959	13,285	2,113	2,086	438
	FY2012	269	615	38,526	38,442	13,865	12,977	2,192	2,261	496
	Year-on-year (%)	-2.9	-3.0	-4.0	-3.8	-0.7	-2.3	3.7	8.4	13.2
Video picture information production & distribution	FY2011	310	523	22,184	21,487	8,076	7,066	490	560	378
	FY2012	298	533	23,727	23,378	8,682	7,740	623	726	276
	Year-on-year (%)	-3.9	1.9	7.0	8.8	7.5	9.5	27.1	29.6	-27.0
TV program production	FY2011	237	364	15,280	14,866	4,704	4,313	240	268	253
	FY2012	210	344	15,817	15,507	4,671	4,392	214	258	142
	Year-on-year (%)	-11.4	-5.5	3.5	4.3	-0.7	1.8	-10.8	-3.7	-43.9
Sound information production	FY2011	30	55	1,678	1,647	1,968	1,802	163	162	19
	FY2012	52	71	1,673	1,670	1,840	1,608	143	135	24
	Year-on-year (%)	73.3	29.1	-0.3	1.4	-6.5	-10.8	-12.3	-16.7	26.3
Radio program production	FY2011	19	27	406	376	57	57	3	2	-
	FY2012	40	46	578	575	76	69	2	2	3
	Year-on-year (%)	110.5	70.4	42.4	52.9	33.3	21.1	-33.3	0.0	-
Newspaper publishers	FY2011	122	2,134	43,339	42,572	18,340	16,529	565	659	631
	FY2012	107	2,005	40,422	39,656	17,761	15,912	3,330	584	700
	Year-on-year (%)	-12.3	-6.0	-6.7	-6.8	-3.2	-3.7	489.4	-11.4	10.9
Other publishers	FY2011	216	895	34,640	34,487	16,329	15,948	1,193	1,308	377
	FY2012	207	708	27,577	27,342	11,873	11,408	335	480	294
	Year-on-year (%)	-4.2	-20.9	-20.4	-20.7	-27.3	-28.5	-71.9	-63.3	-22.0
Commercial art & graphic design	FY2011	62	132	2,914	2,881	749	724	34	35	26
	FY2012	61	111	3,055	3,038	924	884	43	45	19
	Year-on-year (%)	-1.6	-15.9	4.8	5.4	23.4	22.1	26.5	28.6	-26.9
Services incidental to video picture, sound information, character information production & distribution	FY2011	57	204	5,240	5,199	1,090	876	22	28	29
	FY2012	67	227	4,977	4,958	1,009	864	21	32	53
	Year-on-year (%)	17.5	11.3	-5.0	-4.6	-7.4	-1.4	-4.5	14.3	82.8
Other (Other than IC companies)	FY2011	758	7,460	390,999	387,216	205,643	23,991	3,209	2,714	2,472
	FY2012	737	7,433	422,852	417,703	231,595	25,516	4,140	4,035	2,472
	Year-on-year (%)	-2.8	-0.4	8.1	7.9	12.6	6.4	29.0	48.7	0.0

(Note) “Sales from the IC business” refers to sales related to the information and communication business.

- The number of establishments per IC company was 3.5 (0.0 points difference), and the number of regular workers was 223 (down 1.3%).
- Sales per IC company were 9.37 billion yen (up 4.2%), out of which 8.59 billion yen (up 4.1%) were the sales from the information and communications business. The operating profit was 915 million yen (up 17.5%) and the ordinary profit was 888 million yen (up 10.8%). The number of subsidiaries and affiliated companies owned was 4.2 (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	FY2011	4.4	266	264	11,451.0	7,560.5	730.4	741.4	4.9
	FY2012	4.4	272	270	12,440.8	7,872.5	865.9	840.5	4.9
	Year-on-year (%)	0.0	2.3	2.3	8.6	4.1	18.6	13.4	0.0
IC company	FY2011	3.5	226	226	8,992.5	8,249.8	778.5	801.5	4.1
	FY2012	3.5	224	223	9,370.7	8,585.7	915.1	887.9	4.2
	Year-on-year (%)	0.0	-0.9	-1.3	4.2	4.1	17.5	10.8	0.1
Telecommunications	FY2011	5.9	851	848	120,456.4	114,447.2	14,896.3	15,437.8	10.0
	FY2012	7.2	742	736	141,900.8	134,386.8	18,241.2	19,466.1	10.4
	Year-on-year (%)	1.3	-12.8	-13.2	17.8	17.4	22.5	26.1	0.4
Private broadcasting	FY2011	2.8	84	82	6,953.4	6,718.1	429.9	479.4	3.8
	FY2012	2.8	85	84	7,347.6	7,120.8	458.3	470.1	3.4
	Year-on-year (%)	0.0	1.2	2.4	5.7	6.0	6.6	-1.9	-0.4
Cablecasting	FY2011	2.5	81	81	3,990.1	3,613.3	489.4	358.4	2.2
	FY2012	2.4	67	67	2,859.5	2,826.4	540.9	262.4	2.3
	Year-on-year (%)	-0.1	-17.3	-17.3	-28.3	-21.8	10.5	-26.8	0.1
Software	FY2011	2.8	240	239	5,422.3	4,705.9	291.2	297.6	3.1
	FY2012	2.8	244	244	5,866.5	5,125.2	364.9	370.1	3.2
	Year-on-year (%)	0.0	1.7	2.1	8.2	8.9	25.3	24.4	0.1
Data processing & information services	FY2011	4.5	295	294	6,384.6	5,676.5	398.0	406.1	4.3
	FY2012	4.3	310	309	6,803.2	6,002.5	444.2	464.3	4.7
	Year-on-year (%)	-0.2	5.1	5.1	6.6	5.7	11.6	14.3	0.4
Internet based services	FY2011	2.3	145	144	5,039.4	4,796.0	763.0	753.1	4.4
	FY2012	2.3	143	143	5,154.4	4,824.1	815.0	840.5	5.0
	Year-on-year (%)	0.0	-1.4	-0.7	2.3	0.6	6.8	11.6	0.6
Video picture information production & distribution	FY2011	1.7	72	69	2,605.0	2,279.4	158.0	180.7	6.2
	FY2012	1.8	80	78	2,913.4	2,597.2	209.1	243.5	4.2
	Year-on-year (%)	0.1	11.1	13.0	11.8	13.9	32.3	34.8	-2.0
TV program production	FY2011	1.5	64	63	1,984.8	1,819.9	101.4	112.9	5.5
	FY2012	1.6	75	74	2,224.4	2,091.6	102.1	123.1	3.2
	Year-on-year (%)	0.1	17.2	17.5	12.1	14.9	0.7	9.0	-2.3
Sound information production	FY2011	1.8	56	55	6,561.1	6,007.7	541.7	539.0	2.4
	FY2012	1.4	32	32	3,537.8	3,092.2	275.1	260.3	2.2
	Year-on-year (%)	-0.4	-42.9	-41.8	-46.1	-48.5	-49.2	-51.7	-0.2
Radio program production	FY2011	1.4	21	20	298.4	298.2	15.7	11.3	-
	FY2012	1.2	14	14	190.6	173.1	4.0	4.5	1.5
	Year-on-year (%)	-0.2	-33.3	-30.0	-36.1	-42.0	-74.5	-60.2	-
Newspaper publishers	FY2011	17.5	355	349	15,032.4	13,548.3	463.2	540.0	9.4
	FY2012	18.7	378	371	16,599.2	14,871.5	3,112.6	546.1	10.8
	Year-on-year (%)	1.2	6.5	6.3	10.4	9.8	572.0	1.1	1.4
Other publishers	FY2011	4.1	160	160	7,559.6	7,383.5	552.5	605.6	4.4
	FY2012	3.4	133	132	5,735.7	5,510.9	161.8	231.8	3.5
	Year-on-year (%)	-0.7	-16.9	-17.5	-24.1	-25.4	-70.7	-61.7	-0.9
Commercial art & graphic design	FY2011	2.1	47	46	1,208.8	1,167.6	54.9	56.4	1.7
	FY2012	1.8	50	50	1,515.3	1,448.9	69.9	73.7	1.5
	Year-on-year (%)	-0.3	6.4	8.7	25.4	24.1	27.3	30.7	-0.2
Services incidental to video picture, sound information, character information production & distribution	FY2011	3.6	92	91	1,911.9	1,537.3	38.8	49.7	2.6
	FY2012	3.4	74	74	1,505.3	1,289.4	31.2	47.9	3.5
	Year-on-year (%)	-0.2	-19.6	-18.7	-21.3	-16.1	-19.6	-3.6	0.9
Other (Other than IC company)	FY2011	9.8	516	511	27,129.7	3,165.0	423.4	358.0	8.6
	FY2012	10.1	574	567	31,424.1	3,462.1	561.8	547.4	8.4
	Year-on-year (%)	0.3	11.2	11.0	15.8	9.4	32.7	52.9	-0.2

(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 60.0% (up 1.3 points).
- By sales, companies with “Less than 1 billion yen” accounted for 50.0% (down 0.7 points).
- By number of regular workers, companies with “Less than 100 workers” accounted for 63.4% (0.0 points difference).

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

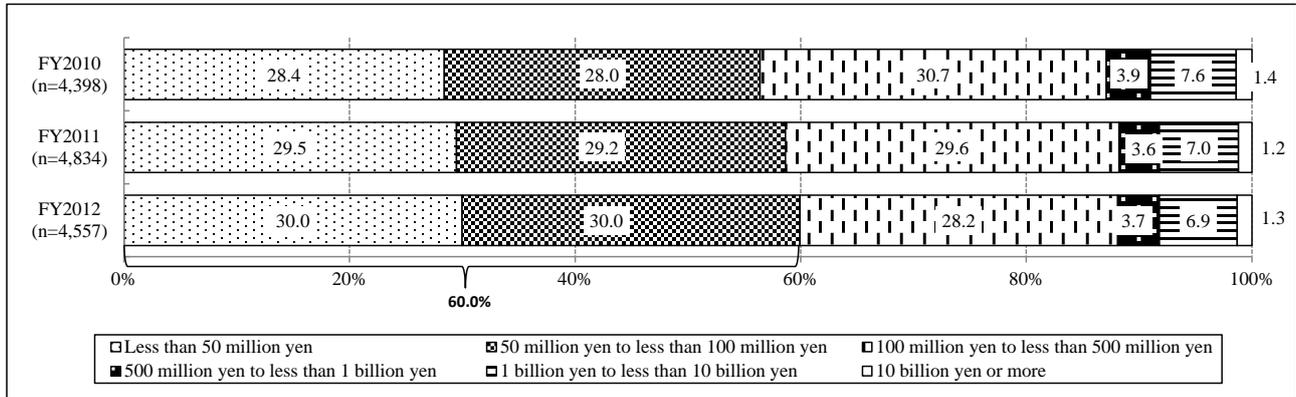


Fig. 1-2-4 Composition Ratios of IC Companies by Sales

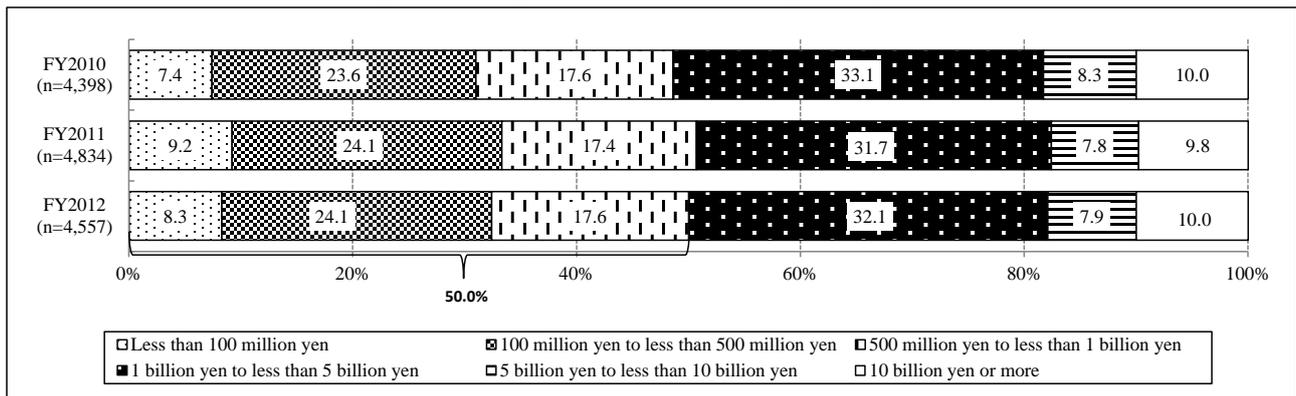
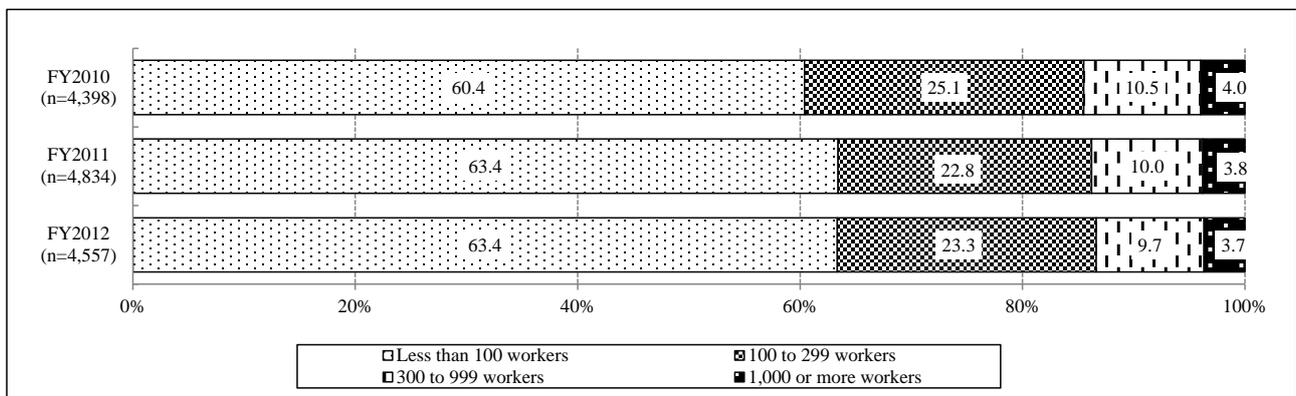


Fig. 1-2-5 Composition Ratios of IC Companies by Number of Regular Workers

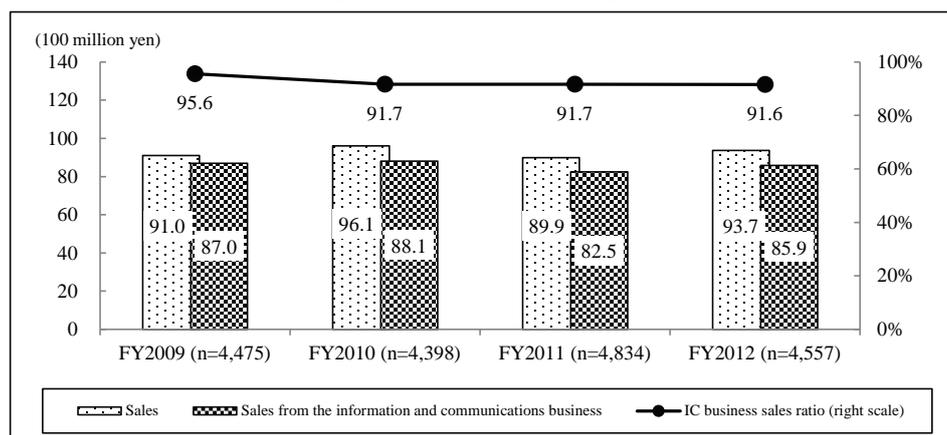


3. Sales and profits

- The sales per IC company were 9.37 billion yen (up 4.2%^(Note)). The sales from the information and communications business were 8.59 billion yen (up 4.1%^(Note)), making up 91.6% of sales (down 0.1 points).
- The operating profit per IC company was 915 million yen (up 17.5%^(Note)), and ordinary profit per IC company was 888 million yen (up 10.8%^(Note)). Current net income per IC company was 470 million yen (up 6.2%^(Note)).
- The operating margin was 9.8% (up 1.1 points), the operating profit on sales was 9.5% (up 0.6 points), and the income margin was 5.0% (up 0.1 points).

(Note) Calculated in 1 million yen units.

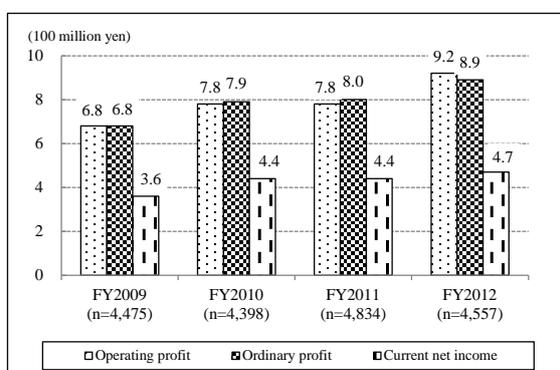
Fig. 1-2-6 Sales per IC Company



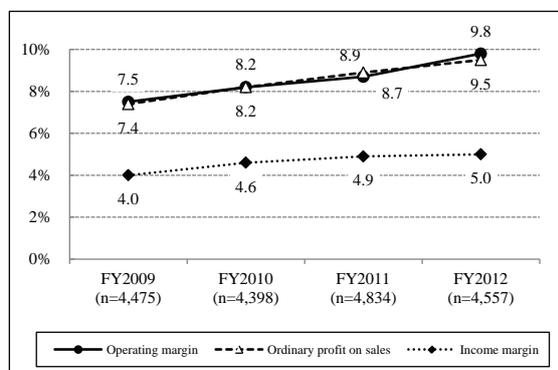
(Note) IC business sales ratio = IC business sales ÷ sales × 100. Calculated in 1 million yen units.

Fig. 1-2-7 Profits of IC companies

[Profits per Company]



[Profit Margin]



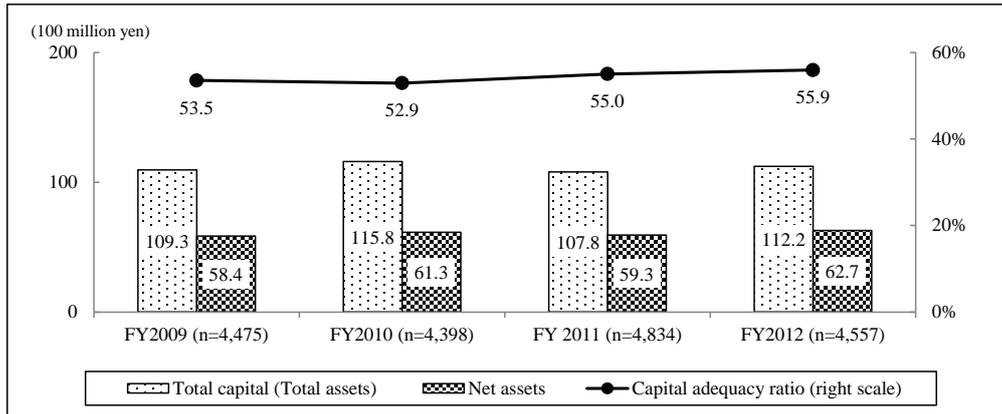
(Notes) Operating margin = Operating profit / Sales × 100 (Profitability index to ascertain how much profit was obtained from operation activities related to the main business from among total sales)
 Ordinary profit on sales = Ordinary profit / Sales × 100 (Profitability index to ascertain how much 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, ordinary 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 11.22 billion yen (up 4.1%^(Note)) and net assets per IC company were 6.27 billion yen (up 5.8%^(Note)). The capital adequacy ratio was 55.9% (up 0.9 points).
- The added value per IC company was 3.45 billion yen (up 3.4%^(Note)). The value added ratio was 36.8% (down 0.3 points) and labor productivity was 15.483 million yen/person (up 4.8%). The labor equipment ratio was 17.352 million yen/person (up 6.2%).

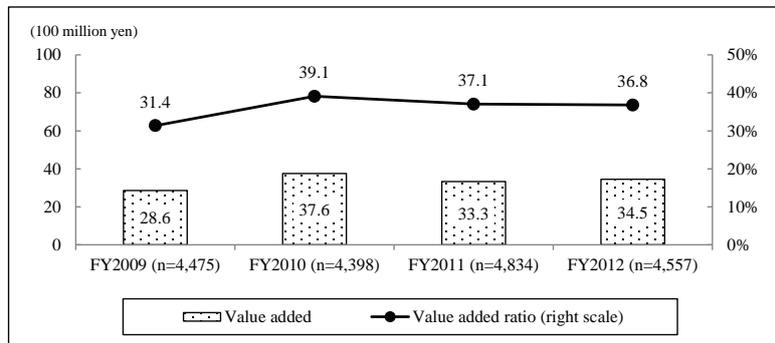
(Note) Calculated in of 1 million yen units

Fig. 1-2-8 Assets per IC Company



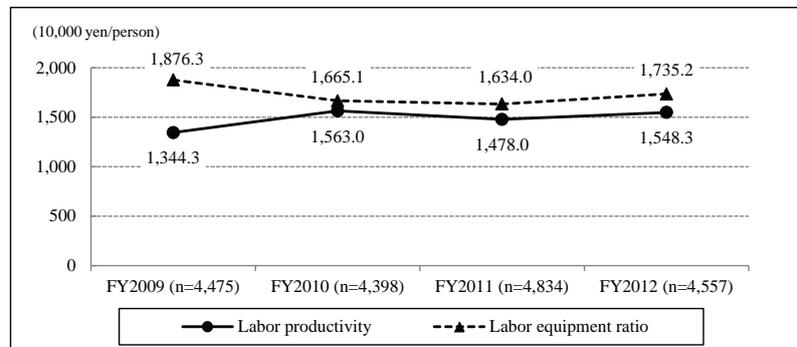
(Note) Capital adequacy ratio = Net assets / Total capital (total assets) × 100. Index to show the percentage of own capital among the total capital and thereby indicate the financial security. Calculated in 1 million yen units.

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. Calculated in 1 million yen units.

Fig.1-2-10 Labor Productivity and Labor 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 1,014,181, out of which 886,662 were full-time workers. The number of part-timers was 69,514 and the number of dispatched workers was 98,884.
- The number of regular workers per IC company was 223 (down 1.3%), out of which 195 was full-time workers (down 2.0%). The number of part-timers was 15 (down 6.3%) and the number of dispatched workers was 22 (0.0 points difference).
- Looking at the composition ratio of regular workers, full-time workers represented 87.4% (down 0.8 points), and the ratio was on a yearly downward trend. Part-timers represented 6.9% (down 0.1 points).

Fig. 1-2-11 Workers at IC Companies

	Number of workers (persons)			Number of Workers per IC Company (persons)		
	FY2011 (n=4,834)	FY2012 (n=4,557)	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)
Workers	1,094,358	1,018,791	-6.9	226	224	-0.9
Regular workers	1,090,074	1,014,181	-7.0	226	223	-1.3
Full-time workers/ Regular staff members	961,662	886,662	-7.8	199	195	-2.0
Part-timers	76,203	69,514	-8.8	16	15	-6.3
Other regular workers	52,209	58,005	11.1	11	13	18.2
Temporary or daily workers	4,284	4,610	7.6	1	1	0.0
Dispatched workers	107,797	98,884	-8.3	22	22	0.0

(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

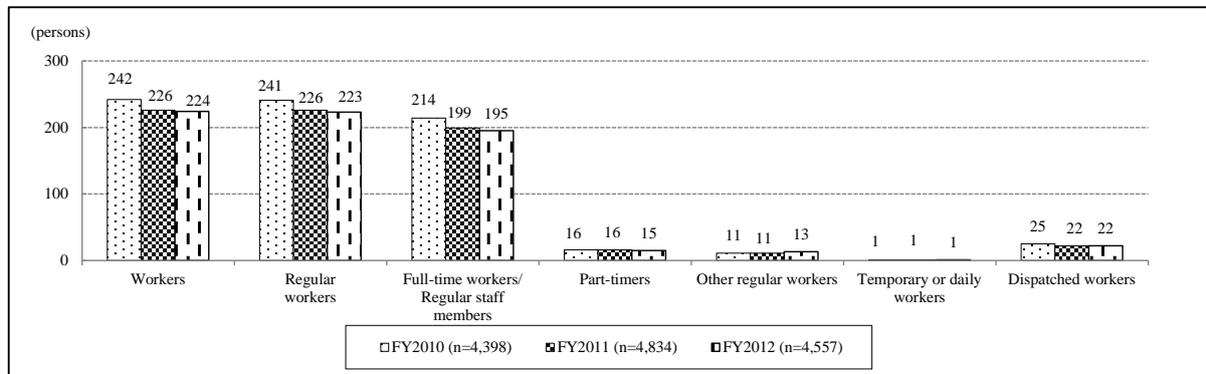
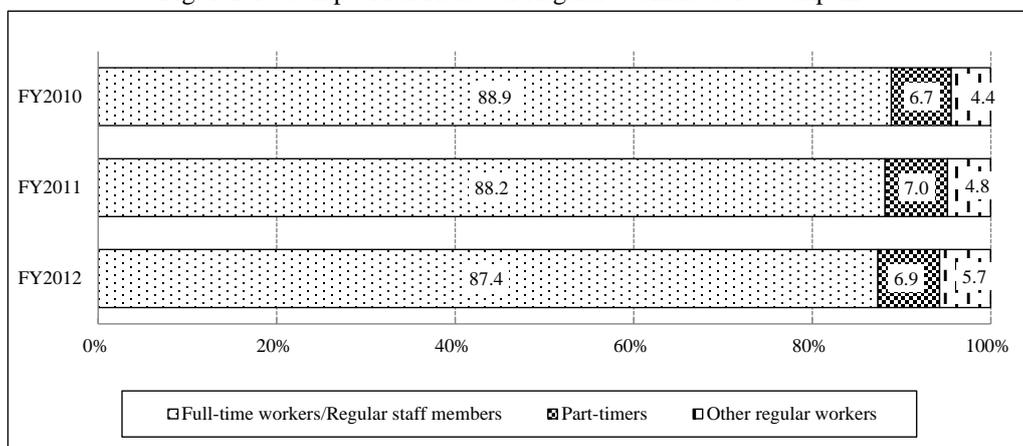


Fig. 1-2-13 Composition Ratios of Regular Workers at IC Companies



6. Subsidiaries and affiliated companies

- The ratio of IC companies that own subsidiaries ^(Note) was 29.4% (up 0.8 points). The ratio of IC companies which own domestic subsidiaries was 25.9% (up 0.9 points), and the ratio of IC companies which own overseas subsidiaries was 8.5% (up 0.2 points).
- The number of subsidiaries was 5,568. Of which, the number of domestic subsidiaries was 4,181 and the number of overseas subsidiaries was 1,387.
- The number of subsidiaries owned per IC company was 4.2 (up 0.1 companies). The number of domestic subsidiaries owned was 3.5 (down 0.1 companies) and the number of overseas subsidiaries owned was 3.6 (up 0.2 companies).
- Looking at overseas subsidiaries by region, Asia accounted for 825 companies (up 25 companies), or 59.5% in terms of the composition ratio (down 0.4 points). Of which, the composition ratio of Asia (excluding China) increased (up 1.7 points).

(Note) Subsidiaries include affiliated companies.

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

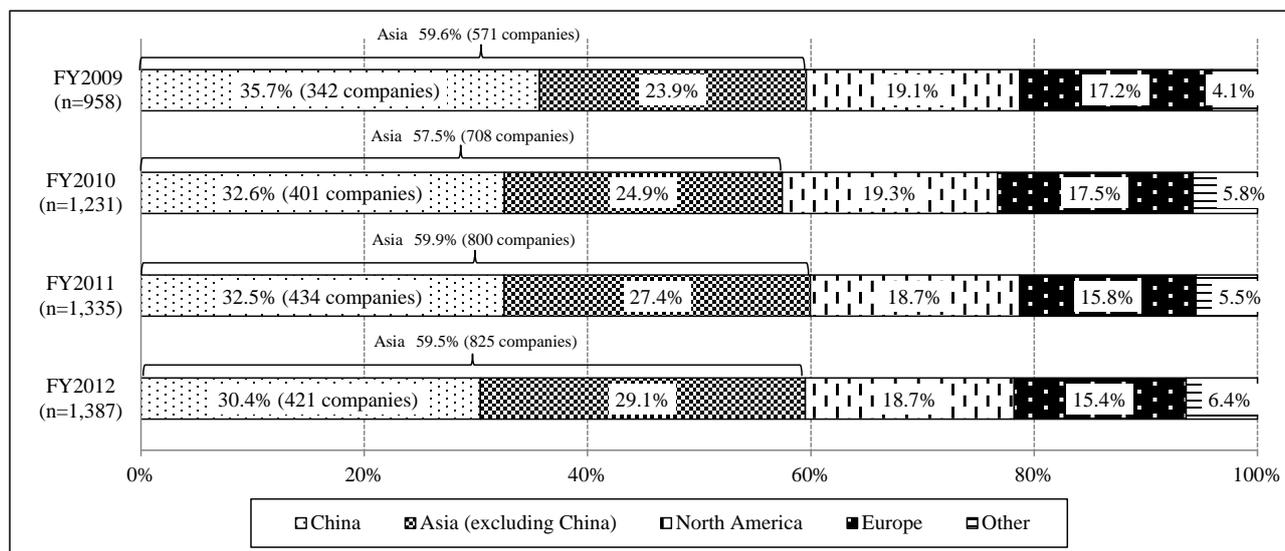
	Number of companies owning subsidiaries		Ratio of companies owning subsidiaries (%)			Number of subsidiaries		Number of subsidiaries owned per IC company		
	FY2011 (n=4,834)	FY2012 (n=4,557)	FY2011	FY2012	Vs. previous fiscal year (points)	FY2011	FY2012	FY2011	FY2012	Vs. previous fiscal year (companies)
IC companies	1,384	1,340	28.6	29.4	0.8	5,715	5,568	4.1	4.2	0.1
Owning domestic subsidiaries	1,208	1,180	25.0	25.9	0.9	4,375	4,181	3.6	3.5	-0.1
Owning overseas subsidiaries	400	386	8.3	8.5	0.2	1,340	1,387	3.4	3.6	0.2

(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

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 795 companies (1,033 companies on a business basis).

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

- By capital, in the total telecommunications and broadcasting business, business operators with capital of “300 million yen to less than 500 million yen” were the largest in number, accounting for 19.9%, followed by those with capital of “100 million yen to less than 300 million yen,” accounting for 18.0%, and those with capital of “1 billion yen to less than 5 billion yen,” accounting for 17.8%. 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 (19.6% and 26.6%), and those with capital of “less than 50 million yen” accounted for the majority in private broadcasting (20.6%).
- By sales of the whole telecommunications and broadcasting business, business operators with sales of “less than 100 million yen,” “100 million yen to less than 1 billion yen” and “1 billion yen to less than 10 billion yen” accounted for approximately 30% each (29.4%, 34.0% and 28.9%, 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 (39.5% and 55.0%, respectively), and those with sales of “less than 100 million yen” accounted for the majority in private broadcasting (41.0%).
- By the number of workers, business operators with “One to 29 workers” accounted for the majority, or 61.5%, followed by those with “30 to 99 workers,” accounting for 22.1%. The same trend is also evident when looking by business type.

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

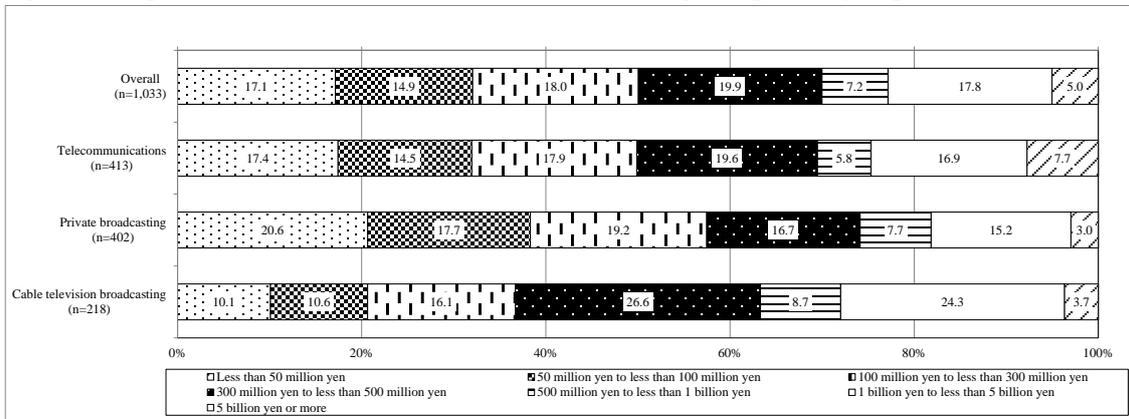


Fig. 2-2 Composition of Telecommunications and Broadcasting Companies by Sales (Business Basis)

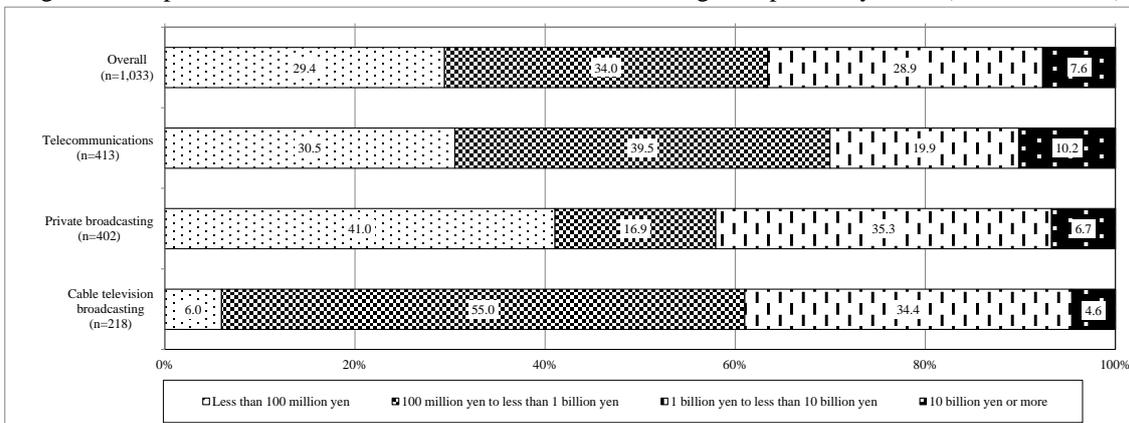
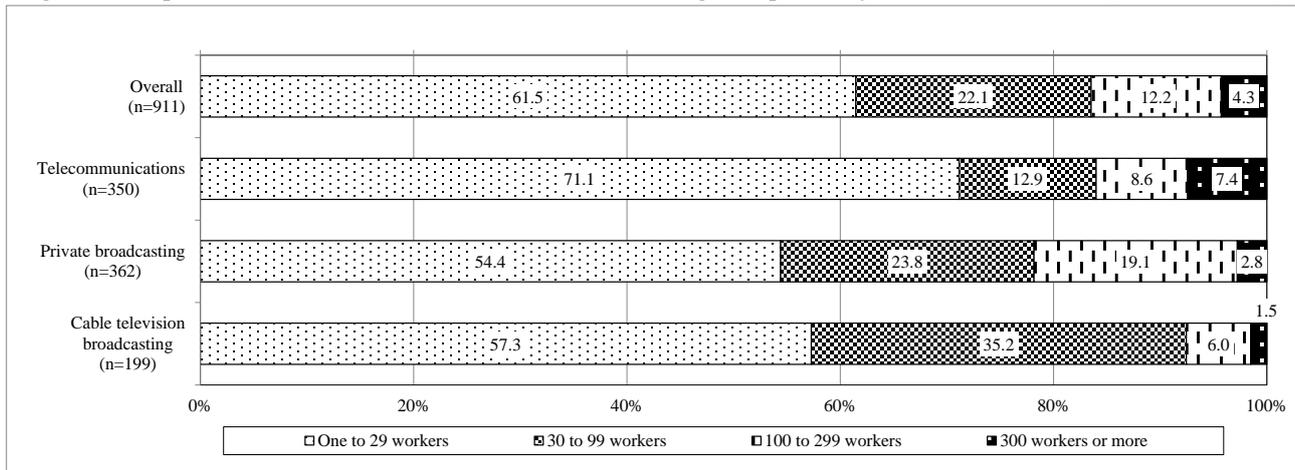


Fig. 2-3 Composition of Telecommunications and Broadcasting Companies by Number of Workers (Business Basis)



2. Sales

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

- The total sales of the telecommunications and broadcasting business in FY2012 (on a business basis) were 15.97 trillion yen.
- The total sales of companies that responded to the survey for the second consecutive year were 15.2982 trillion yen (down 0.6%).
- 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	FY2010		FY2011		FY2012	
	Number of companies	Sales (Composition ratio)	Number of companies	Sales (Composition ratio)	Number of companies	Sales (Composition ratio)
Overall	980	167,525 (100.0%)	970	163,332 (100.0%)	1,034	159,700 (100.0%)
Telecommunications	380	133,682 (79.8%)	373	132,713 (81.3%)	413	129,545 (81.1%)
Broadcasting	600	33,842 (20.2%)	597	30,619 (18.7%)	621	30,155 (18.9%)
Private broadcasting	380	22,835 (13.6%)	371	19,092 (11.7%)	402	19,250 (12.1%)
Cable television broadcasting	219	4,168 (2.5%)	225	4,530 (2.8%)	218	4,300 (2.7%)
NHK	1	6,840 (4.1%)	1	6,997 (4.3%)	1	6,604 (4.1%)

*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	FY2011		FY2012		Year-on-year (%)
	Number of companies	Sales (Composition ratio)	Number of companies	Sales (Composition ratio)	
Overall	730	153,947 (100.0%)	730	152,982 (100.0%)	-0.6
Telecommunications	263	125,799 (81.7%)	263	125,743 (82.2%)	0.0
Broadcasting	467	28,147 (18.3%)	467	27,239 (17.8%)	-3.2
Private broadcasting	301	17,415 (11.3%)	301	17,012 (11.1%)	-2.3
Cable television broadcasting	165	3,735 (2.4%)	165	3,623 (2.4%)	-3.0
NHK	1	6,997 (4.5%)	1	6,604 (4.3%)	-5.6

*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	413	129,545				
Private broadcasting			402	19,250		
Cable television broadcasting					218	4,300
(Other businesses)						
Private broadcasting	38	2,880				
Telecommunications			33	586		
Cable television broadcasting	204	3,944			27	166

* "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 FY2012 by sound or data transmission, sales from data transmission used for such purposes as an Internet connection continued to increase, accounting for 50.5% (up 4.3 points). Looking at fixed/mobile communications, mobile communications accounted for 56.4% (up 5.1 points).
- With regard to the breakdown of sales for FY2012 in the private broadcasting business, 74.1% of the total sales were from terrestrial television broadcasting services (up 1.9 points) and 6.4% were from terrestrial radio broadcasting services (down 0.7 points).
- Of the total sales of the cable television broadcasting business in FY2012, 82.0% were from basic services (up 3.5 points), and 5.0% from pay services (down 2.8 points).

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

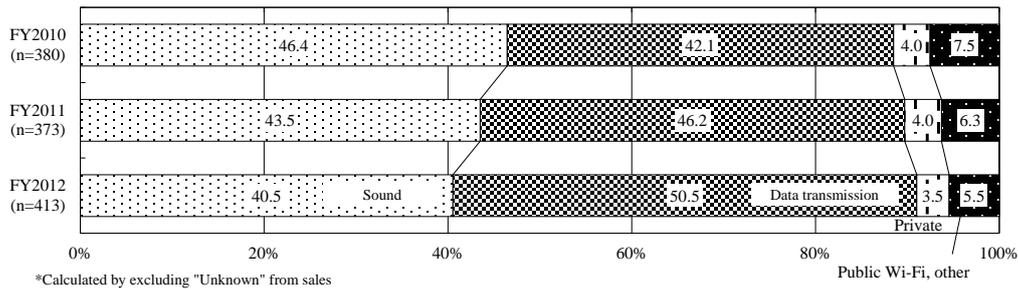


Fig. 2-8 Changes in the Breakdown of Sales of the Telecommunications Business (By Fixed/Mobile)

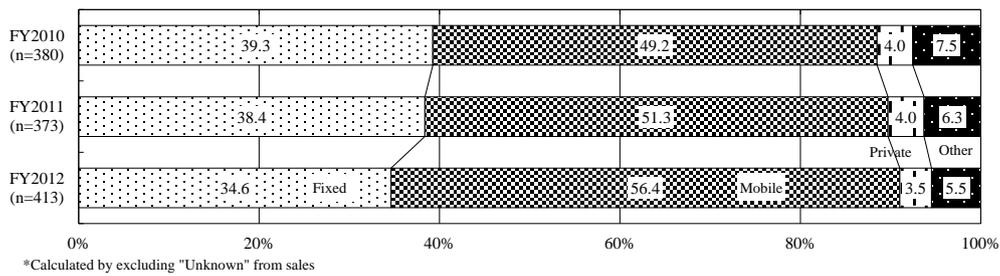


Fig. 2-9 Changes in the Breakdown of Sales of the Private Broadcasting Business

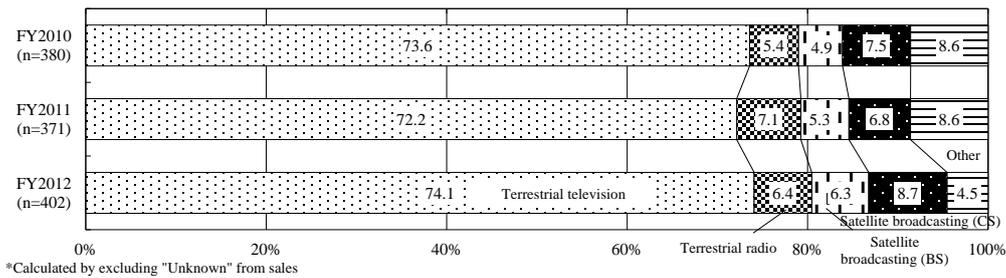
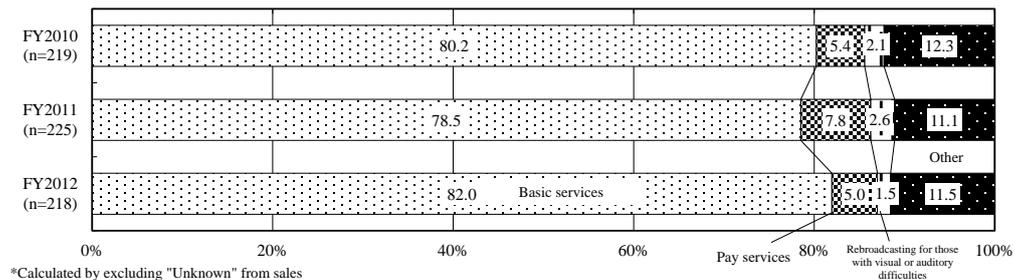


Fig. 2-10 Changes in the Breakdown of Sales of the Cable Television Broadcasting Business



3. Capital investment

- The amount of acquisition and capital investment for the telecommunications and broadcasting business in FY2012 was 1.5424 trillion yen (down 1.9%).
- The amount of acquisition and capital investment in FY2012 for companies that responded to the survey for the second consecutive year was 1.4285 trillion yen (down 0.3%).

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

(Unit: companies, 100 million yen, %)

Classification	FY2010		FY2011		FY2012	
	Number of companies	Capital investment (composition ratio)	Number of companies	Capital investment (composition ratio)	Number of companies	Capital investment (composition ratio)
Overall	621	16,636 (100.0%)	623	15,718 (100.0%)	680	15,424 (100.0%)
Telecommunications	223	14,866 (89.4%)	233	14,352 (91.3%)	258	14,348 (93.0%)
Broadcasting	398	1,770 (10.6%)	390	1,366 (8.7%)	422	1,076 (7.0%)
Private broadcasting	209	817 (4.9%)	194	717 (4.6%)	234	660 (4.3%)
Cable television broadcasting	189	952 (5.7%)	196	649 (4.1%)	188	416 (2.7%)

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	FY2011 performance		Outlook for FY2012		FY2012 performance		Outlook for FY2013	
	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	491	1,432,714 (100.0)	429	1,006,924 (100.0)	503	1,428,509 (100.0)	423	908,843 (100.0)
Telecommunications	171	1,309,921 (91.4)	141	900,007 (89.4)	177	1,337,873 (93.7)	146	829,645 (91.3)
Broadcasting	320	122,793 (8.6)	288	106,917 (10.6)	326	90,636 (6.3)	277	79,198 (8.7)
Private broadcasting	168	65,841 (4.6)	162	56,986 (5.7)	183	56,533 (4.0)	158	49,232 (5.4)
Cable television broadcasting	152	56,952 (4.0)	126	49,931 (5.0)	143	34,103 (2.4)	119	29,966 (3.3)

4. Workers

- The number of workers engaged in the telecommunications and broadcasting business was 115,318, and the number of workers per company was 125.
- 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	
	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012
Number of companies	870	920	311	354	559	566	353	363	206	203
Number of workers	113,822	115,318	81,473	82,136	32,349	33,182	23,651	24,270	8,698	8,912
Number of regular workers	113,164	114,693	81,274	82,124	31,890	32,569	23,244	23,672	8,646	8,897
Full-time worker/Regular staff member	89,759	87,782	65,085	61,623	24,674	26,159	18,937	18,592	5,737	7,567
Part-timers	8,522	7,846	6,433	5,709	2,089	2,137	1,497	1,515	592	622
Workers transferred to other	7,119	12,502	6,459	11,521	660	981	569	835	91	146
Temporary or daily workers	658	625	199	12	459	613	407	598	52	15
Dispatched workers	19,205	14,240	12,638	7,348	6,567	6,892	5,423	5,728	1,144	1,164
Number of workers per company	131	125	262	232	58	59	67	67	42	44

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

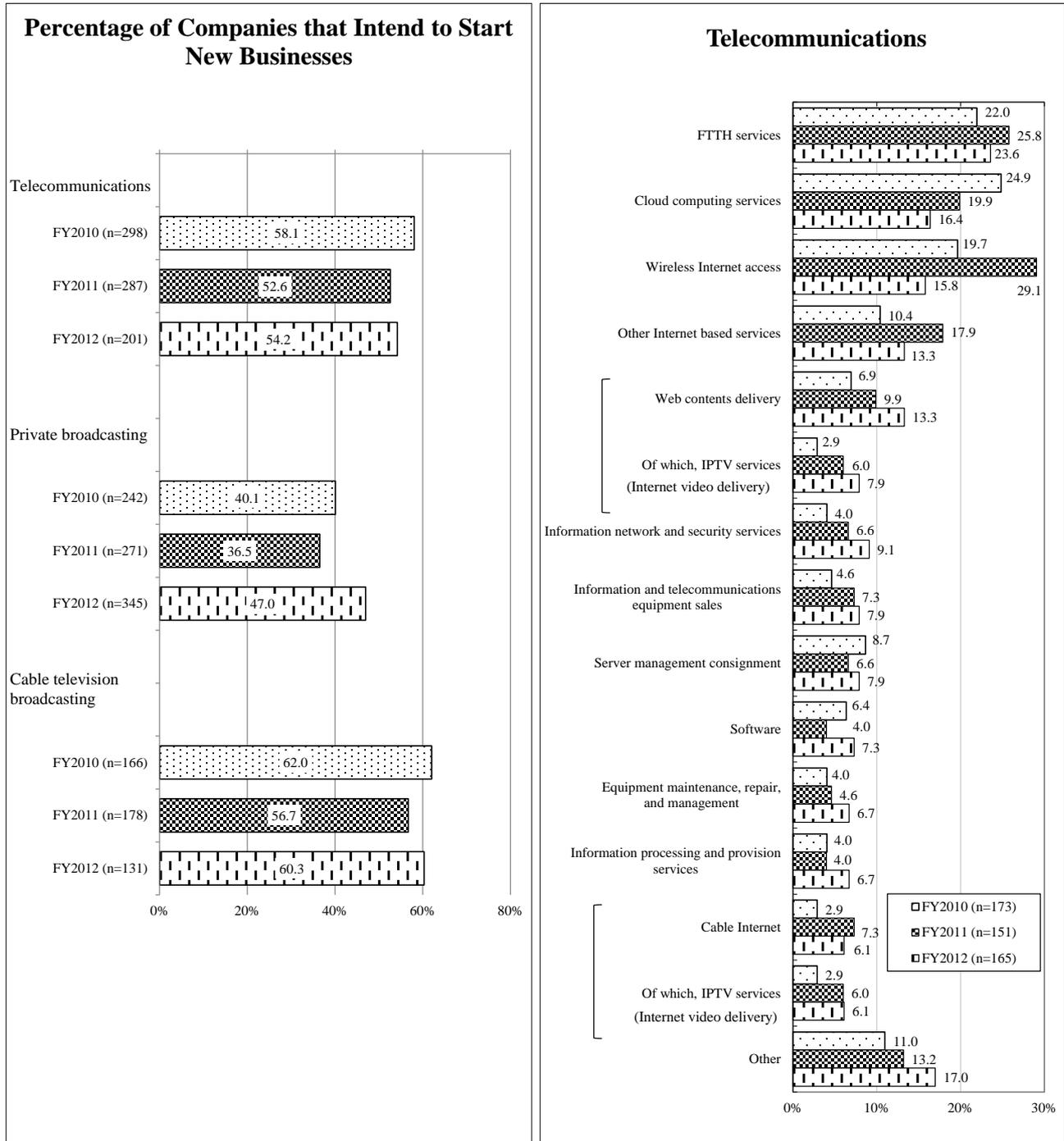
(Unit: companies, persons)

	Telecommunications/ Broadcasting		Telecommunications		Broadcasting		Private broadcasting		Cable television broadcasting	
	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012
Number of companies	664	661	223	224	441	437	289	287	152	150
Number of workers	91,697	94,406	63,167	67,378	28,530	27,028	21,441	20,133	7,089	6,895
Number of regular workers	91,163	93,956	63,015	67,373	28,148	26,583	21,098	19,701	7,050	6,882
Full-time worker/Regular staff member	74,160	70,616	52,927	49,367	21,683	21,249	17,295	15,430	4,388	5,819
Part-timers	4,325	5,774	2,466	4,080	1,859	1,694	1,383	1,248	476	446
Workers transferred to other	6,683	11,912	6,077	11,090	606	822	545	701	61	121
Temporary or daily workers	534	450	152	5	382	445	343	432	39	13
Dispatched workers	13,537	11,231	7,443	5,385	6,094	5,846	5,146	4,864	948	982
Number of workers per company	138	143	283	301	65	62	74	70	47	46

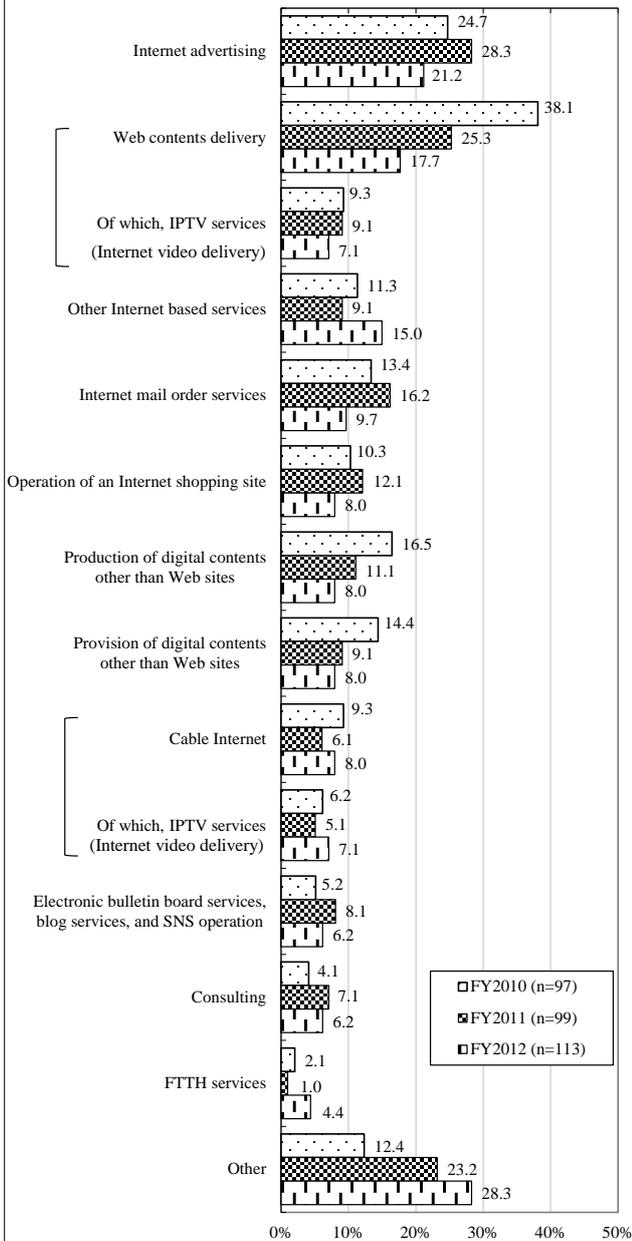
5. Future business operation

- The number of companies that intend to start new businesses within one year has shifted toward an increase in all businesses.
- Regarding new business fields that companies intend to start, the most common answers were “FTTH services” (23.6% and 37.0%, respectively) in the telecommunications business and the cable television broadcasting business, and “internet advertising” (21.2%) in the private broadcasting business.

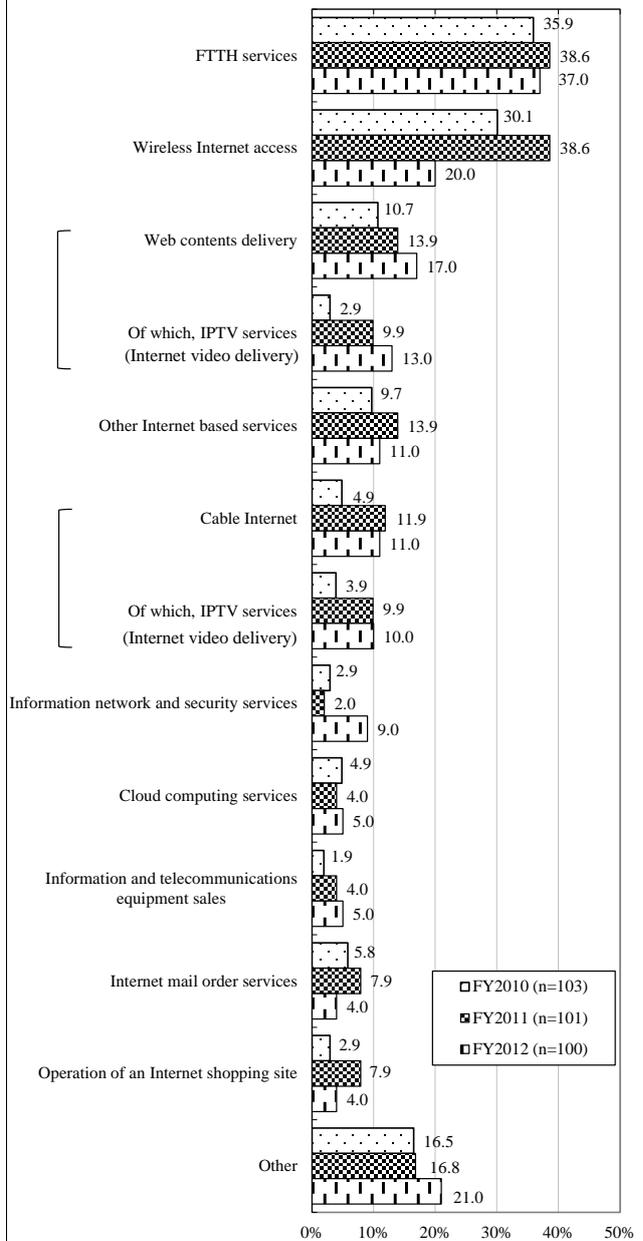
Fig. 2-15 New Businesses that Companies Intend to Start within One Year (multiple answers allowed)



Private broadcasting



Cable television broadcasting



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

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 372 companies.

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

The number of companies engaged in the broadcast program production business was 372.

- Businesses with capital of less than 50 million yen accounted for 63.7% (down 8.4 points), and those with less than 100 workers accounted for 90.8% (down 1.1 points). Most of the companies engaged in this business were small and medium-sized.
- By sales, businesses with sales of “100 million yen to less than 300 million yen” were the largest in number, accounting for 23.7% (down 6.5 points), followed by those with sales of “Less than 50 million yen” (23.4% (up 2.4 points)) and those with sales of “1 billion yen or more” (19.1% (up 2.4 points)).

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

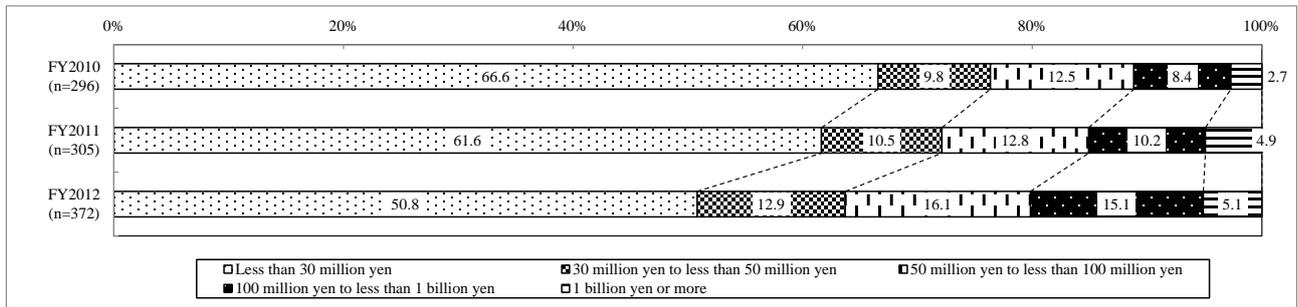


Fig. 3-2 Composition of Broadcast Program Production Companies by Number of Workers

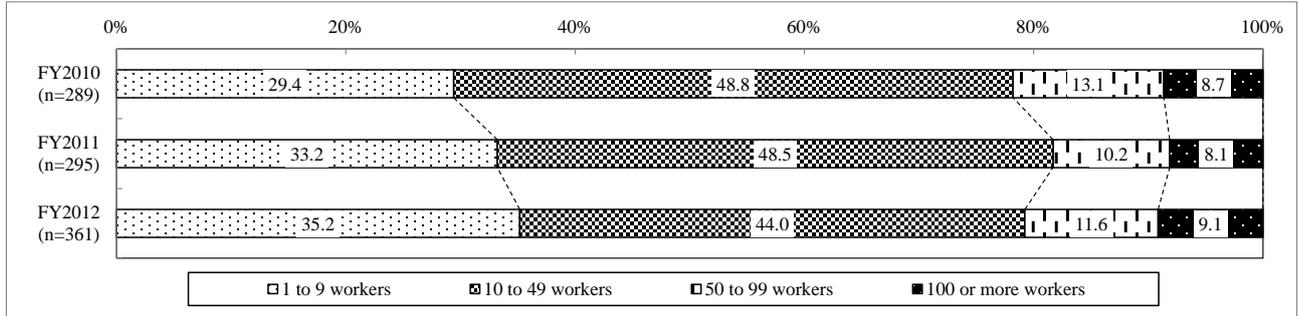
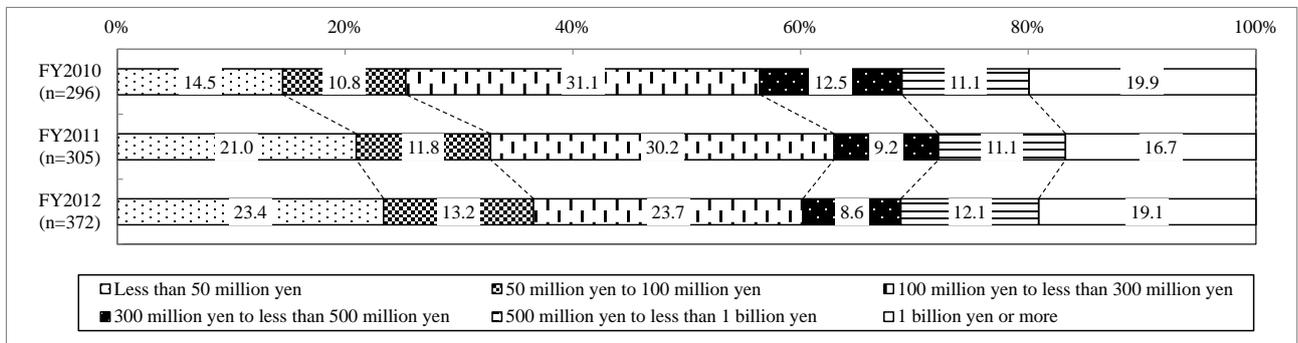


Fig. 3-3 Composition of Broadcast Program Production Companies by Sales



2. Sales

- Sales of the broadcast program production business in FY2012 were 324.1 billion yen (up 10.7%). Sales per company were 870 million yen (down 9.2%).
- Looking at sales of companies that responded to the survey for the second consecutive year, the amount increased from 183.2 billion yen in FY2011 to 199.6 billion yen in FY2012 (up 9.0%).

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

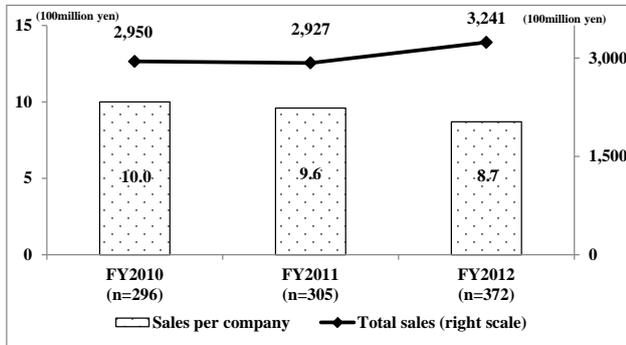
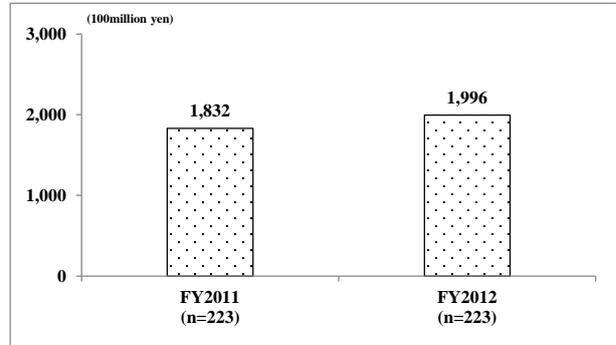


Fig. 3-5 Changes in Sales of Companies that Responded to the Survey for the Second Consecutive Year



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 use was 85.2% (up 6.5 points).
- Looking at the types of secondary usage, "rebroadcasting the program" accounting for 61.7% (down 7.5 points), "making the program into a video (incl. DVDs, BDs, and CD-ROMs)" accounting for 45.5% (up 0.4 points), and "delivering the program via the Internet" accounting for 32.9% (up 5.1 points).

Fig. 3-6 Secondary Usage of Television Broadcast Programs

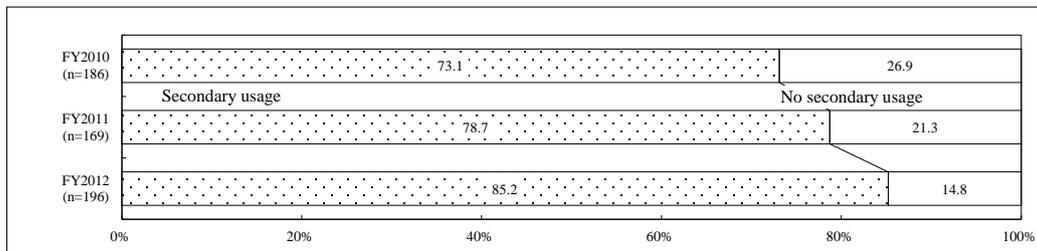
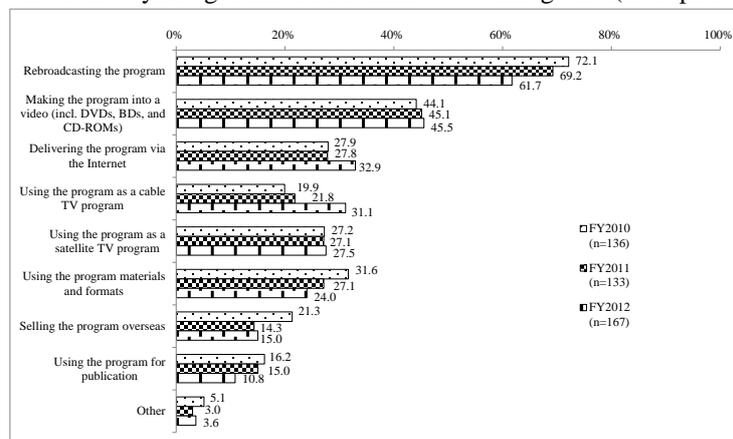


Fig. 3-7 Types of Secondary Usage of Television Broadcast Programs (multiple answers allowed)



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 FY2012 was 6.70 billion yen (up 46.7%) and the ratio of capital investment to sales was 3.1% (up 0.4 points).

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

	Full-time workers/regular staff members		Contract workers	
	FY2011	FY2012	FY2011	FY2012
Number of those newly hired/contract workers	3,622	3,695	1,999	449
Number of new graduates	1,336	1,197	18	4
Number of mid-career employees/contract workers	2,286	2,498	1,981	445
Number of resignees/those with cancelled contracts	2,876	2,820	1,671	304

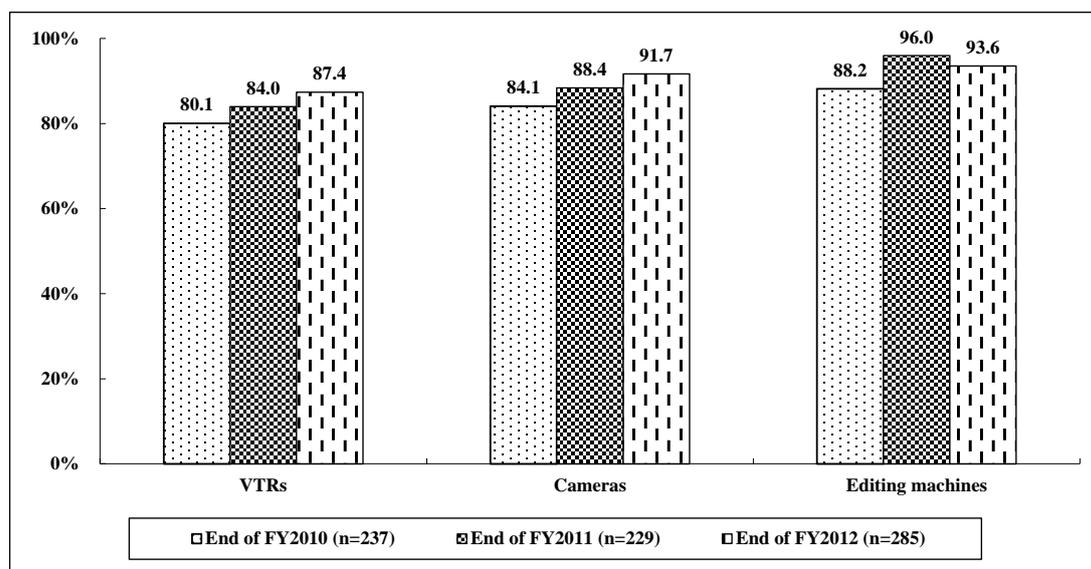
(Note)

Number of mid-career employees, contract workers = Number of those newly hired/contrast workers - Number of new graduates

(2) Digitalization of instruments

- Looking at the digitalization of instruments used for broadcast program production, 87.4% of VTRs (up 3.4 points), 91.7% of cameras (up 3.3 points), and 93.6% of editing machines (down 2.4 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 13,413 (up 24.5%), out of which 13,236 were regular workers (up 26.0%).
- The number of workers per company was 37 (0.0 points difference).

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

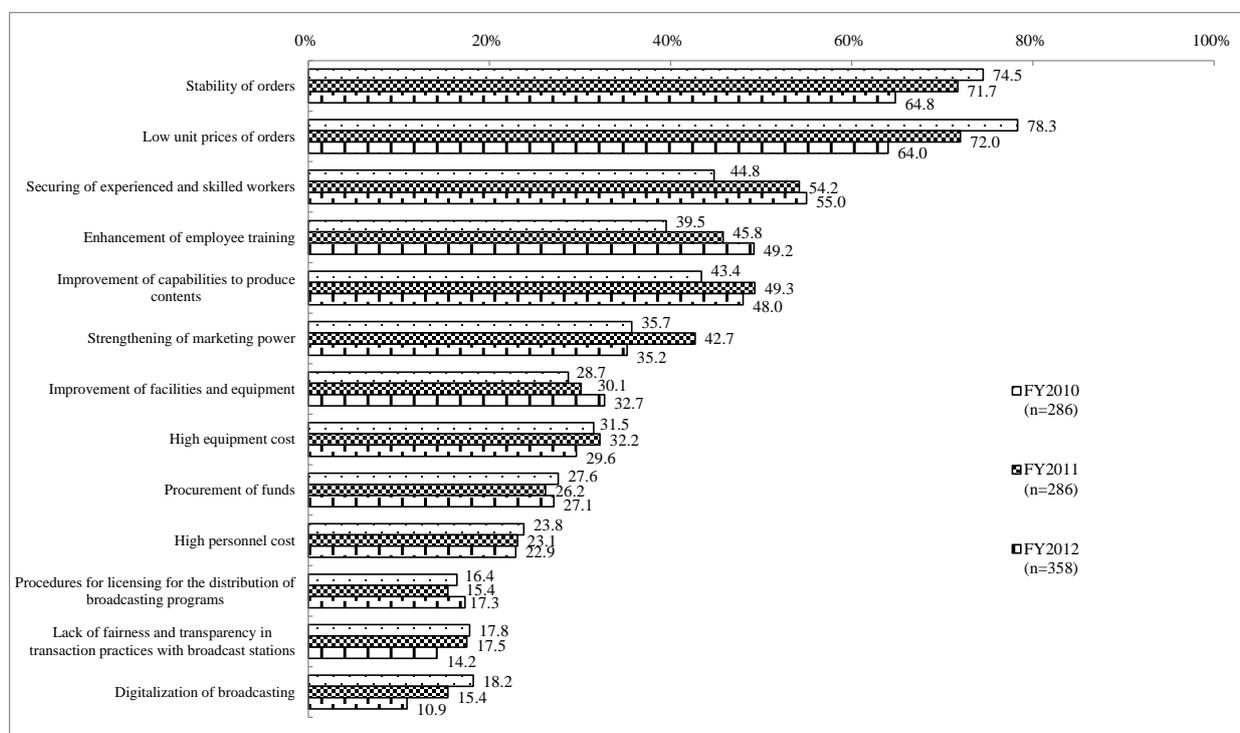
(Unit: companies, persons)

	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	
	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012	FY2011	FY2012
Number of companies	295	361	186	184	29	47	38	58	29	53	13	19
Number of workers	10,773	13,413	4,917	5,014	1,253	2,020	1,282	2,169	1,962	3,077	1,359	1,133
Regular workers	10,504	13,236	4,858	4,952	1,217	1,988	1,235	2,160	1,907	3,003	1,287	1,133
Full-time workers/Regular staff members	8,606	10,487	3,921	3,850	1,094	1,672	903	1,583	1,565	2,557	1,123	825
Part-timers	674	863	313	312	79	129	56	38	183	312	43	72
Workers transferred to other companies	438	297	226	169	42	41	32	45	37	37	101	5
Temporary or daily workers	269	177	59	62	36	32	47	9	55	74	72	-
Dispatched workers	419	742	79	120	88	272	54	81	142	202	56	67
Number of workers per company	37	37	26	27	43	43	34	37	68	58	105	60

6. Management problems

- As management problems in the broadcast program production business, approximately 60% of businesses answered stability of orders (64.8% (down 6.9 points)) and low unit prices of orders (64.0% (down 8.0 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 541 companies.

1. Number of companies and sales

- Sales per company engaged in the Internet Based Service business were 2.59 billion yen in FY2012 (down 5.9%). Sales per company that responded to the survey for the second consecutive year were 3.01 billion yen (down 0.6%).
- Looking at the composition ratios of the number of companies by capital, companies with capital of less than 100 million yen accounted for 45.5% of the total (up 1.7 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 94.9% of the total revenue (up 0.4 points).

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

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)
Total	541	541	0.0	1,489,504	1,400,920	-5.9	2,753.2	2,589.5	-5.9
Web information search services	57	64	12.3	101,577	140,374	38.2	1,782.1	2,193.3	23.1
Shopping site operation and auction site operation	72	80	11.1	157,343	178,270	13.3	2,185.3	2,228.4	2.0
Electronic bulletin board services, blog services, and SNS operation	21	22	4.8	169,835	166,691	-1.9	8,087.4	7,576.9	-6.3
Web contents delivery services	153	152	-0.7	205,904	233,647	13.5	1,345.8	1,537.2	14.2
Revenue from IPTV services	11	13	18.2	5,465	6,694	22.5	496.8	514.9	3.6
Cloud computing services	117	119	1.7	76,160	80,092	5.2	650.9	673.0	3.4
Electronic authentication services	13	13	0.0	12,228	11,804	-3.5	940.6	908.0	-3.5
Information network security services	59	59	0.0	41,399	55,728	34.6	701.7	944.5	34.6
Charging/settlement agent services	16	21	31.3	121,386	126,601	4.3	7,586.6	6,028.6	-20.5
Server management consignment	112	101	-9.8	44,194	49,844	12.8	394.6	493.5	25.1
Other Internet based services	170	157	-7.6	428,245	350,612	-18.1	2,519.1	2,233.2	-11.3
(Special tabulation) Companies that responded to the survey for the second consecutive year	395	395	-	1,195,266	1,188,383	-0.6	3,026.0	3,008.6	-0.6

(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

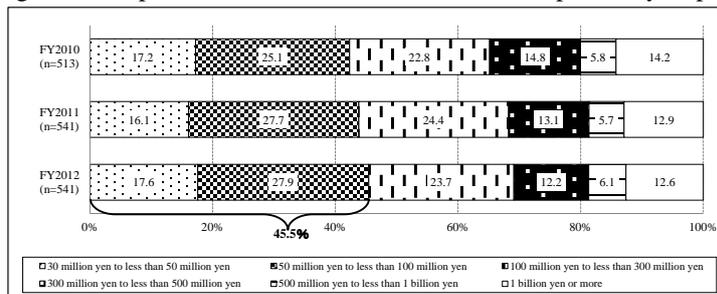
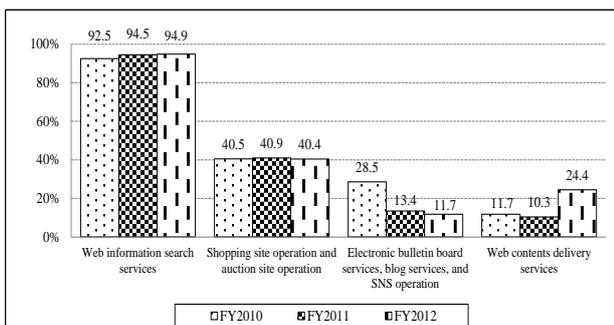
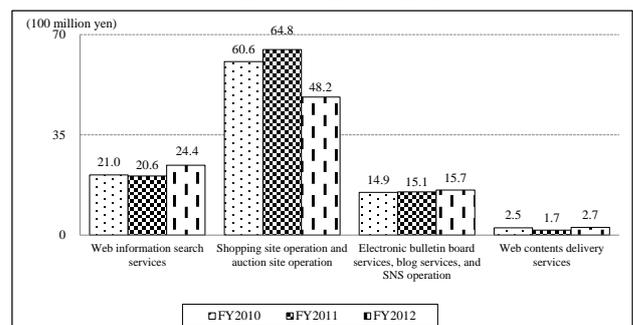


Fig. 4-3 Advertising Revenue by Service Type

[Percentage of advertising revenue]



[Advertising revenue per company]



(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 352 million yen in FY2012 (up 9.7%). The outlook for the next fiscal year (FY2013) is 228 million yen (up 6.4%).
- The ratio of capital investment to sales was 9.3% in FY2012 (up 0.8 points).

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

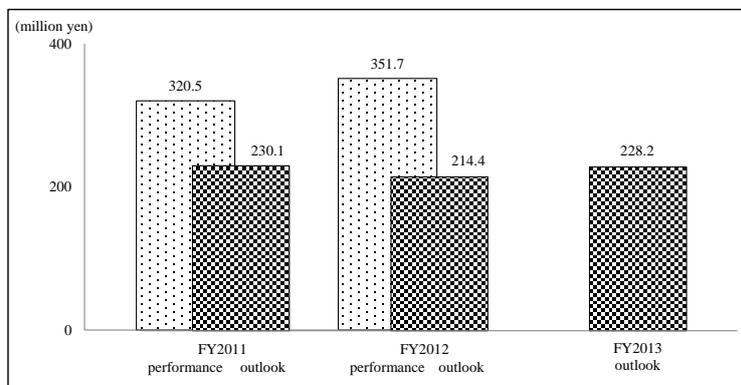


Fig. 4-5 Ratios of Capital Investment to Sales

	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 (%)
FY2011 performance	305	3,764.8	320.5	8.5	387.7	8.8
FY2012 performance	305	3,792.3	351.7	9.3	449.2	9.9
Year-on-year (%)	0.0	0.7	9.7	0.8	15.9	1.1

(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

- 57.0% of companies implemented outsourcing (up 2.1 points).
- The outsourcing cost per company was 388 million yen (down 18.5%).

Fig 4-6 Percentages of Companies Implementing Outsourcing

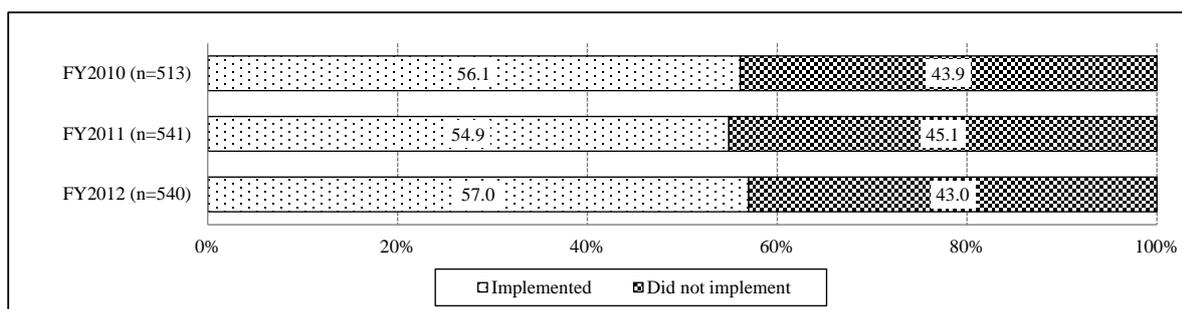


Fig 4-7 Outsourcing by Capital

		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)	FY2011	289	35	73	77	37	21	46
	FY2012	298	43	73	79	35	20	48
	Year-on-year (%)	3.1	22.9	0.0	2.6	-5.4	-4.8	4.3
Outsourcing cost per company (million yen)	FY2011	475.2	61.0	119.4	139.7	216.9	479.9	2,121.9
	FY2012	387.5	37.7	91.8	164.7	216.6	270.1	1,690.6
	Year-on-year (%)	-18.5	-38.2	-23.1	17.9	-0.1	-43.7	-20.3

4. Workers

- The number of regular workers per company was 87 (down 3.3%), out of which 67 were full-time workers (down 2.9%).
- Looking at new hires and resignees, the rate of those newly hired and that of resignees for full-time workers were 9.4% (up 0.4 points) and 7.2% (up 0.1 points), respectively. The rate of contract workers newly hired and that of those with cancelled contracts were 18.3% (down 11.3 points) and 12.4% (down 12.3 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		FY2012	
		Per company		Per company		Per company		Per company
Number of companies that provided valid answers (companies)	286	-	513	-	541	-	541	-
Number of workers (persons)	22,726	79	36,610	71	49,385	91	47,365	88
Number of regular workers	22,707	79	36,373	71	48,916	90	47,146	87
Full-time workers/regular staff members	19,509	68	30,025	59	37,433	69	36,473	67
Part-timers	772	3	1,405	3	3,121	6	3,041	6
Workers transferred to other companies	281	1	1,286	3	1,535	3	1,839	3
Contract workers	1,110	4	1,690	3	5,083	9	2,150	4
Temporary or daily workers	19	0	237	0	469	1	219	0
Dispatched workers (persons)	2,638	9	4,808	9	4,707	9	5,089	9

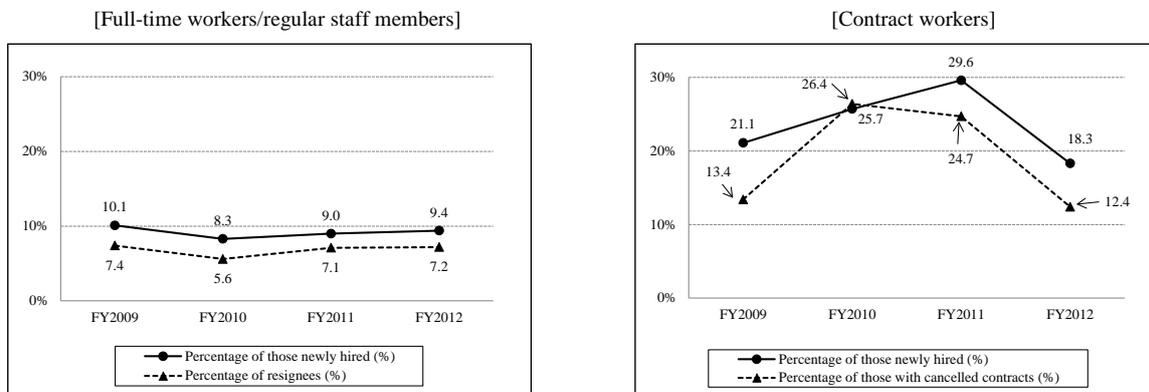
Fig. 4-9 Number of Newly Hired/Contract Workers and Resignees/Those with Cancelled Contracts

	Full-time workers/regular staff members		Contract workers	
	FY2011	FY2012	FY2011	FY2012
Number of those newly hired/contract workers	3,622	3,695	1,999	449
Number of new graduates	1,336	1,197	18	4
Number of mid-career employees/contract workers	2,286	2,498	1,981	445
Number of resignees/those with cancelled contracts	2,876	2,820	1,671	304

(Note)

Number of mid-career employees, contract workers = Number of those newly hired/contrast workers - Number of new graduates

Fig. 4-10 New Hires and Resignees



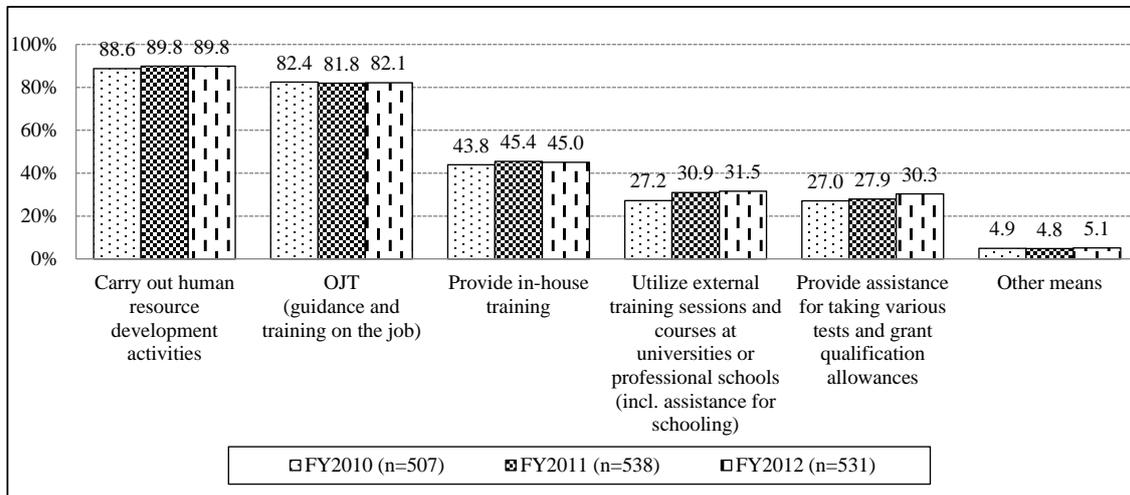
(Notes) Percentage of those newly hired = Number of those newly hired / (Number of full-time workers + Number of resignees) × 100
 Percentage of resignees = Number of resignees / (Number of full-time workers + Number of resignees) × 100

(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

5. Human resource development

- The percentage of companies that carried out human resource development activities accounted for 89.8% (0.0 points difference). Of these, 82.1% provided OJT (guidance and training on the job) (up 0.3 points).

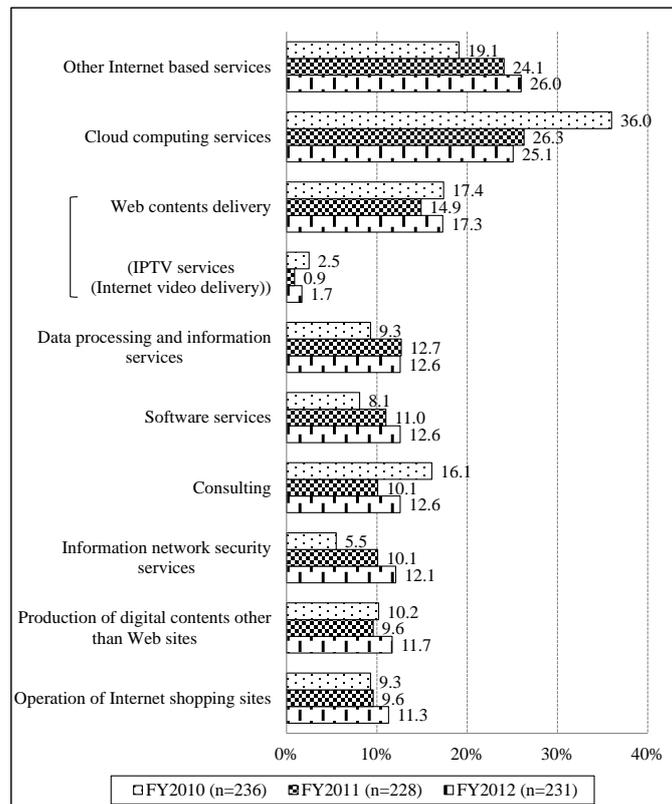
Fig. 4-11 Percentage of Companies that Carried Out Human Resource Development Activities (Multiple answers allowed)



6. New business fields

- Regarding new business fields that companies intend to start within one year, the most common answer was “Cloud computing services” accounting for 25.1% (down 1.2 points), followed by “Web contents delivery” accounting for 17.3% (up 2.4 points).

Fig. 4-12 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.

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 3,329 companies.

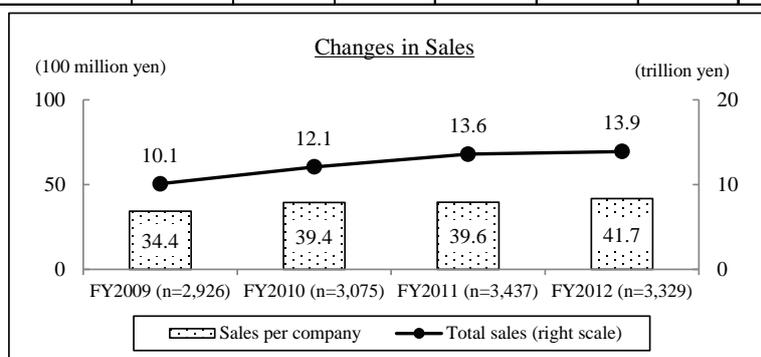
1. Number of companies and sales

- The sales per company engaged in the information services business was 4.17 billion yen in FY2012 (up 5.3%), with an increase in sales by game software service companies (up 69.0%) and custom software service companies (up 8.8%).
- 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 represent 60%. By sector, in research & information service companies, package software service companies, and data processing service companies, those with less than 1 billion yen in sales represent 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)		
	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)
Total	3,437	3,329	-3.1	13,622,118	13,888,689	2.0	3,963.4	4,172.0	5.3
Custom software service companies	1,702	1,626	-4.5	6,627,421	6,887,830	3.9	3,893.9	4,236.1	8.8
Embedded software service companies	117	107	-8.5	193,975	180,682	-6.9	1,657.9	1,688.6	1.9
Package software service companies	270	274	1.5	348,249	360,896	3.6	1,289.8	1,317.1	2.1
Game software service companies	63	60	-4.8	297,005	478,029	60.9	4,714.4	7,967.2	69.0
Data processing service companies	641	637	-0.6	3,019,653	2,884,841	-4.5	4,710.8	4,528.8	-3.9
Research & information service companies	146	116	-20.5	278,648	216,443	-22.3	1,908.5	1,865.9	-2.2
Miscellaneous information service companies	498	509	2.2	2,857,167	2,879,968	0.8	5,737.3	5,658.1	-1.4
(Special tabulation) Companies that responded to the survey for the second consecutive year	2,835	2,835	-	12,511,351	12,938,209	3.4	4,413.2	4,563.7	3.4



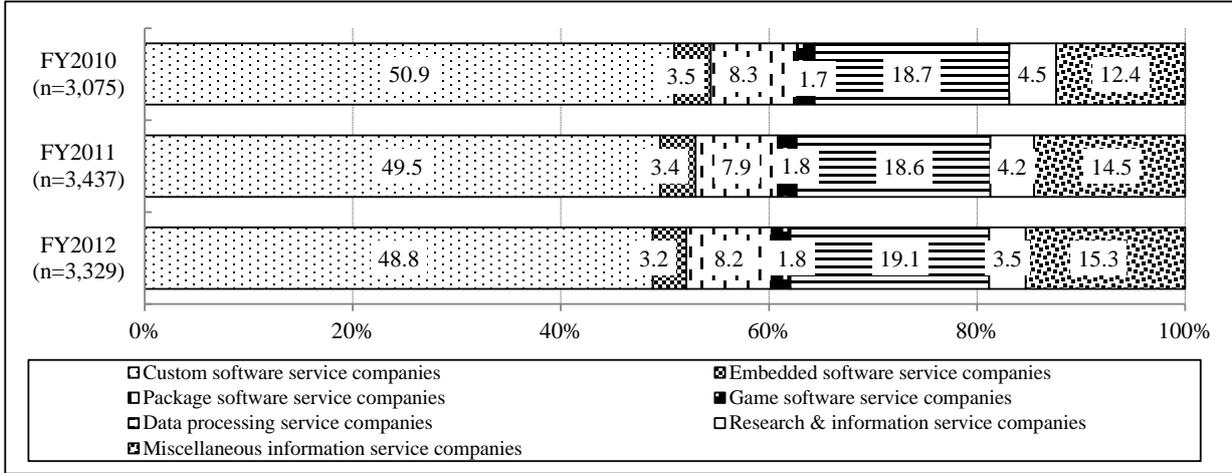
(Reference: Based on Companies' Activities)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)
Total	3,437	3,329	-3.1	13,622,118	13,888,689	2.0	3,963.4	4,172.0	5.3
Custom software service	2,334	2,254	-3.4	6,120,315	6,271,765	2.5	2,622.2	2,782.5	6.1
Embedded software service	327	282	-13.8	315,392	259,976	-17.6	964.5	921.9	-4.4
Package software service	706	687	-2.7	671,324	701,060	4.4	950.9	1,020.5	7.3
Game software service	92	81	-12.0	283,922	468,333	65.0	3,086.1	5,781.9	87.4
Data processing service	1,095	1,054	-3.7	3,041,793	3,050,142	0.3	2,777.9	2,893.9	4.2
Research & information service	250	217	-13.2	296,035	244,983	-17.2	1,184.1	1,129.0	-4.7
Miscellaneous information service	1,086	1,057	-2.7	2,893,337	2,892,430	0.0	2,664.2	2,736.5	2.7

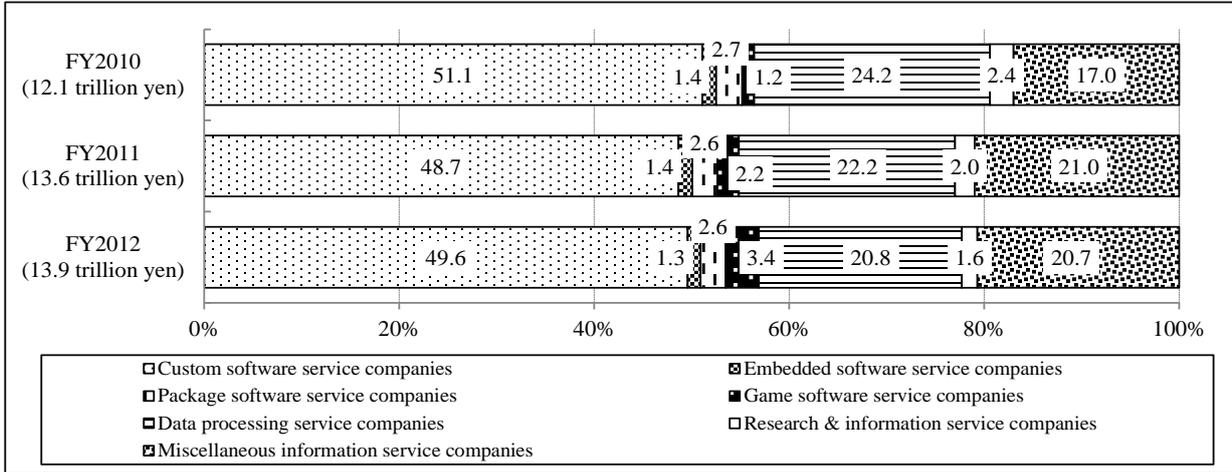
(Note) The number of companies represents the number of companies that are operating relevant businesses even at the very minimum, and thus, the total and the sum of the breakdown do not match.

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

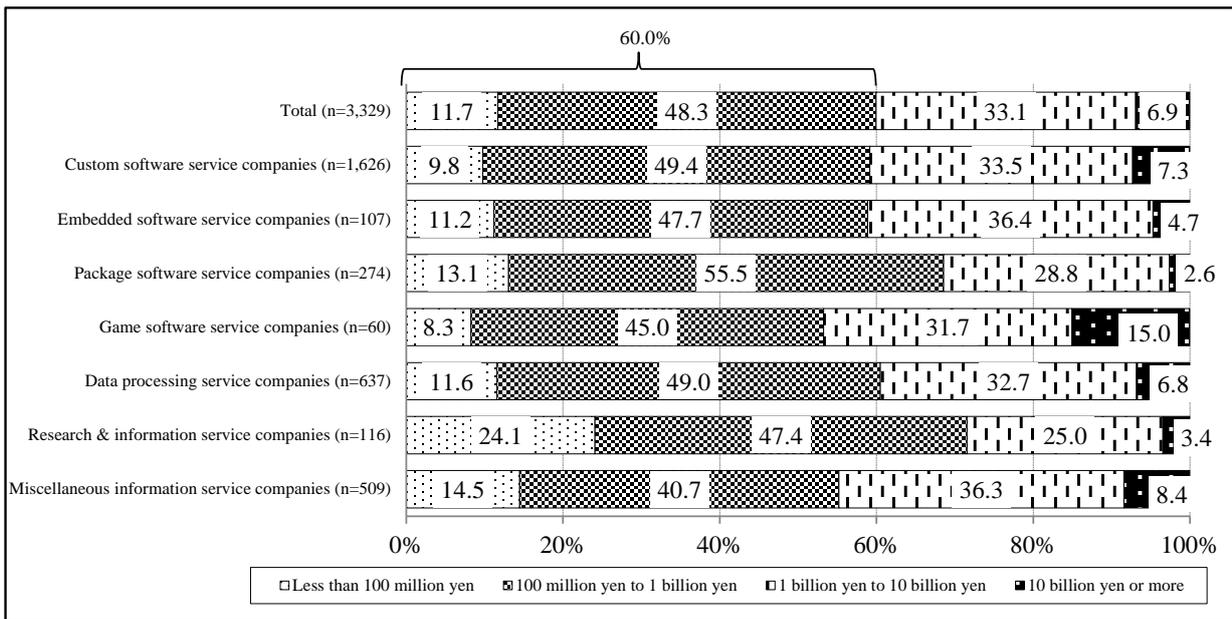
[Composition Ratio of the Number of Companies by Sector]



[Composition Ratio of Sales by Sector]



[Composition Ratio of the Number of Companies by Sales]

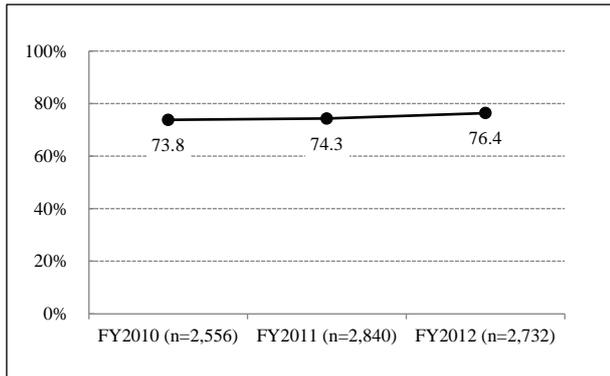


2. Outsourcing in the development and production section

- The percentage of companies that outsourced work was 76.4% (up 2.1 points).
- The outsourcing cost per company was 1.31 billion yen (up 12.9%).
- 4.2% of the total was outsourced overseas (up 1.2 points).
- Per company, 254 pieces of work were outsourced (down 23.8%). Of these, there were sales-based payments for 53.6 pieces of work (down 12.3%). Sales-based payment was adopted in 21.1% (up 2.8 points).

Fig. 5-3 Outsourcing

[Percentage of companies that implemented outsourcing]



[Outsourcing cost per company]

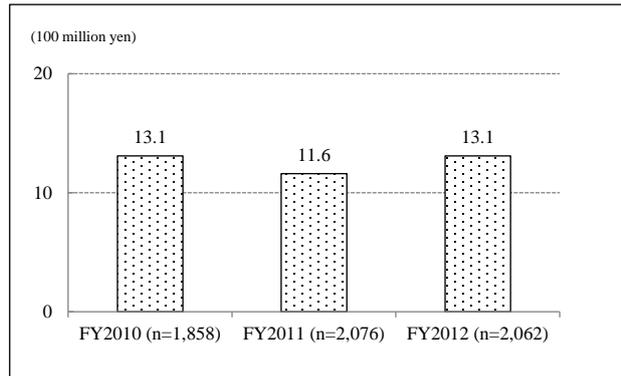
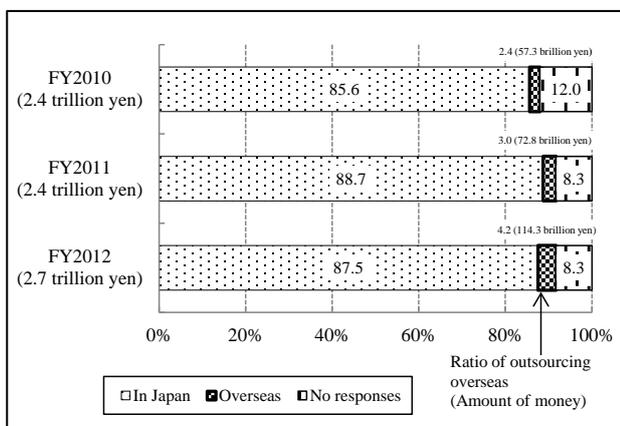
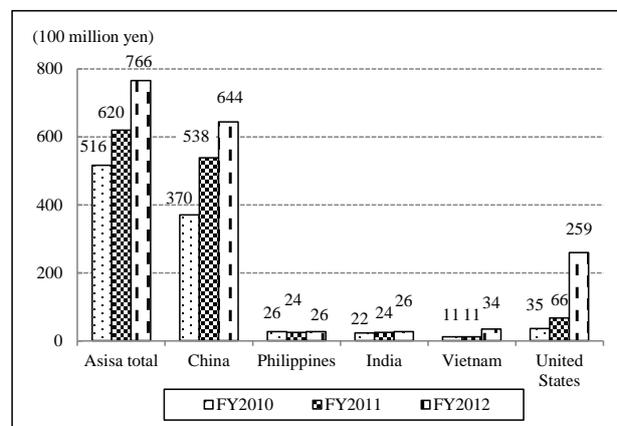


Fig. 5-4 Outsourcing Overseas

[Composition ratios in Japan and overseas]



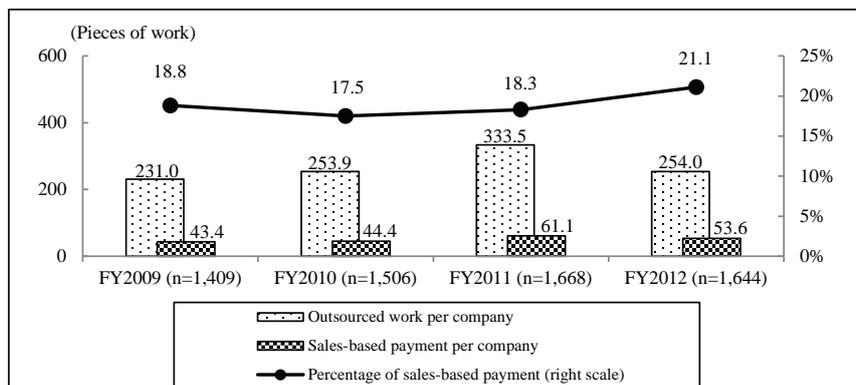
[Outsourcing costs overseas by region]



(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 89.9% (down 0.2 points).
- The amount of accepted commissioned work per company was 2.58 billion yen (up 2.0%).
- Of the total, 3.9% was commissioned from overseas (up 0.4 points).
- Looking at the percentages of the number of companies according to primary contractors and subcontractors, the percentage of primary contractors accounted for 86.4% (up 0.1 points), and first subcontractors accounted for 56.3% (down 0.3 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]

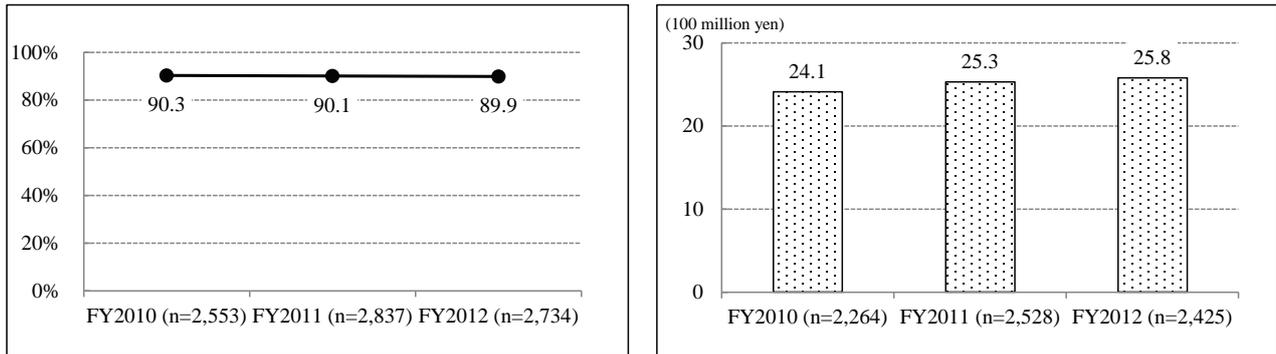
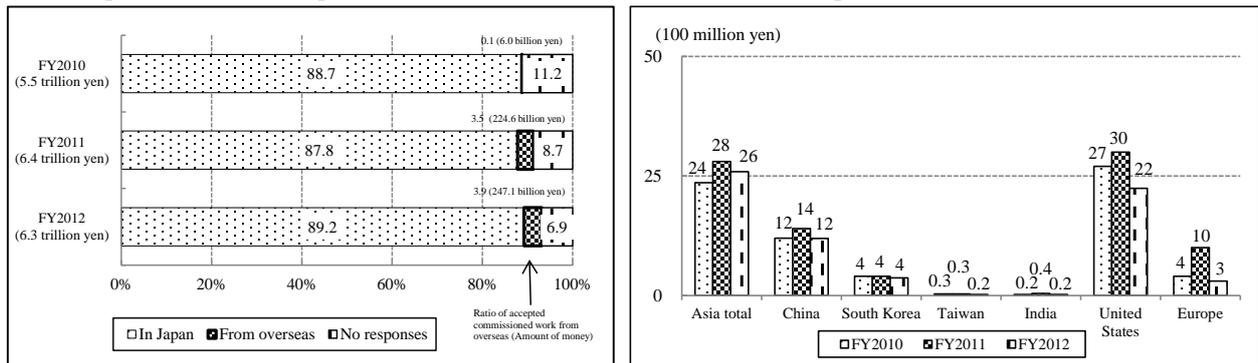


Fig. 5-7 Acceptance of Commissioned Work from Overseas

[Composition ratios in Japan and overseas]

[Amount of accepted commissioned work from overseas]



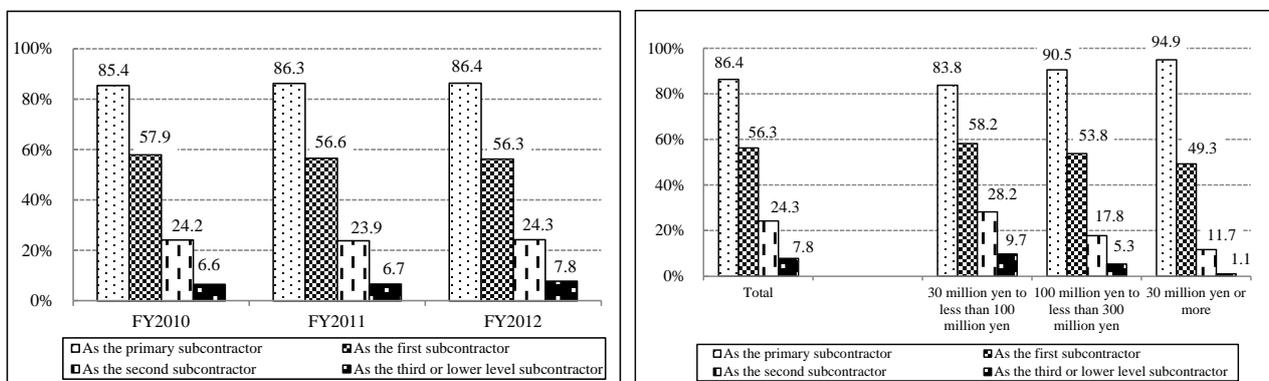
(Note) Includes companies that gave no responses regarding from where they accepted commissioned work.

(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 170 (down 2.9%), 156 were full-time workers (up 1.3%), three were part-time workers (down 25.0%) and 14 were dispatched workers (0.0 points difference). Looking at composition ratios of regular workers, full-time workers accounted for 91.9% (up 3.8 points).
- The number of foreign full-time workers was 5,152. Its composition ratio of regular workers was 1.1% (down 0.1 points). By region, the number of full-time workers from Philippines and the United States has decreased. The number of foreign contract workers was 443. Vietnamese and Indian numbers have decreased.
- The percentage of full-time workers newly hired fell below that of resignees. In comparing to full-time workers, there has been a greater change in the percentage of newly hired and cancelled contracts worker.

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

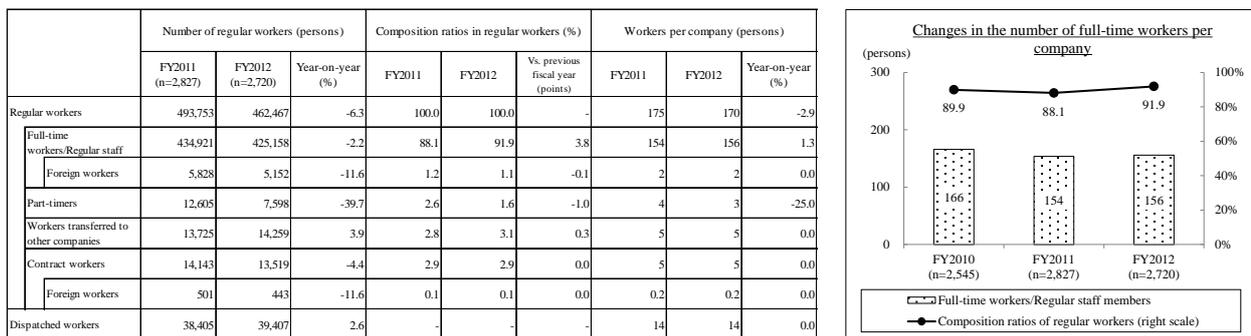


Fig.5-10 Number of Foreign Workers by Region

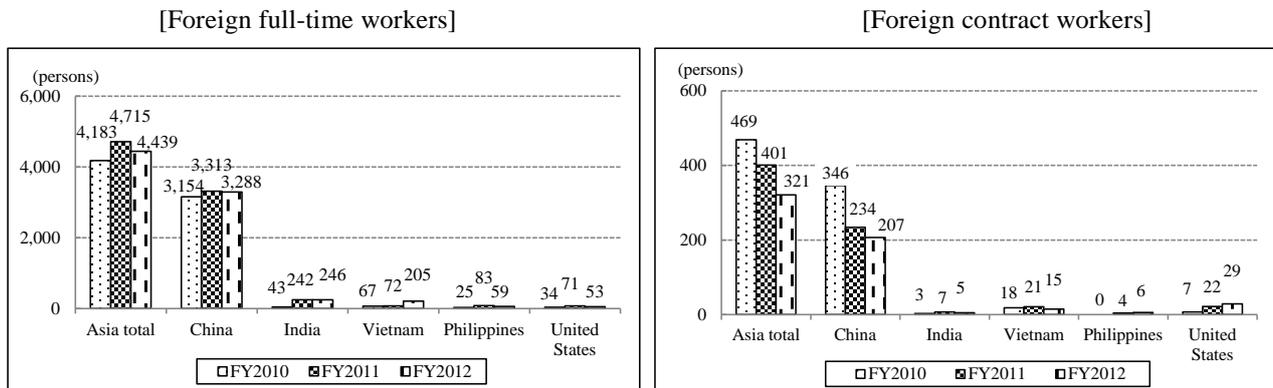
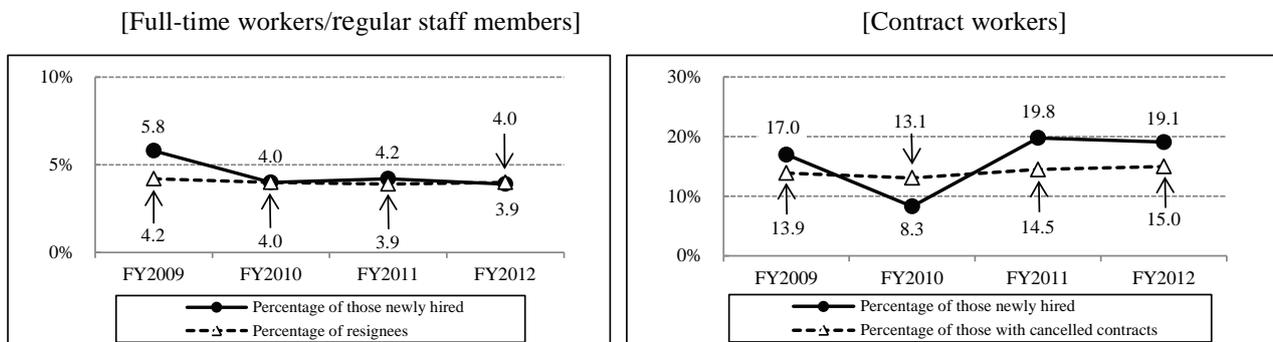


Fig. 5-11 New Hires and Resignees



(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 97.4% (up 0.3 points). Of them, 93.2% provided OJT (guidance and training on the job) (up 0.8 points), 71.6% provided in-house training (up 1.4 points) and 64.3% provided assistance for taking the Information Technology Engineers Examination and grant qualification allowances (up 1.8 points).
- The percentage of companies using IT skill standards (ITSS) was 30.1% (0.0 points difference). The percentage of companies using the Embedded Technology Skill Standards (ETSS) was 6.4% (down 0.2 points). The percentage of companies using the Users' Information Systems Skill Standards (UISS) was 5.0% (down 0.4 points).
- The percentage of companies carried out business-academia collaborations was 14.3% (down 0.2 points). The percentage of companies provided employee training by utilizing universities was 4.2% (up 0.2 points). The percentage of companies offered cooperation for university education was 25.0% (up 0.4 points).

Fig. 5-12 Percentage of Companies that Carried Out Human Resource Development Activities (Multiple answers allowed)

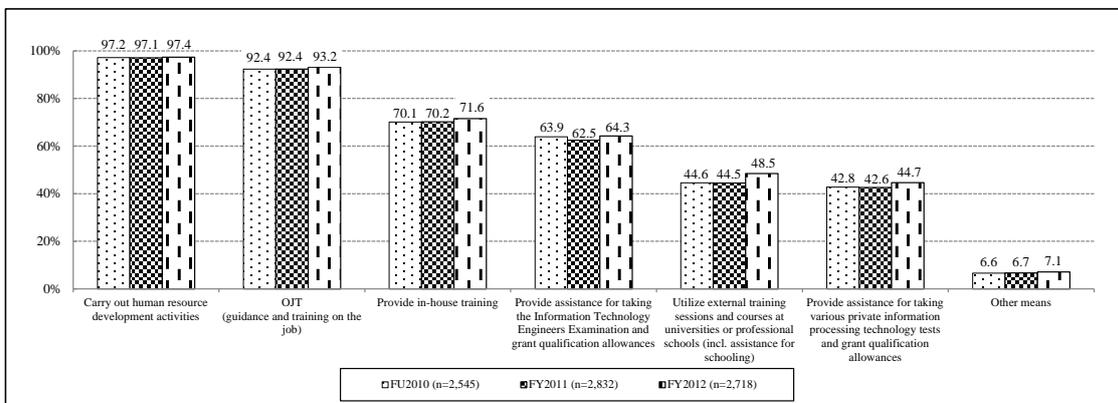


Fig. 5-13 Percentage of Companies Using Skill Standards

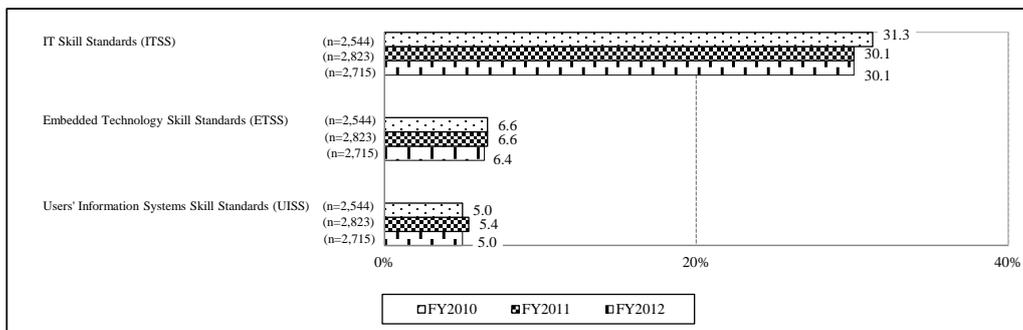
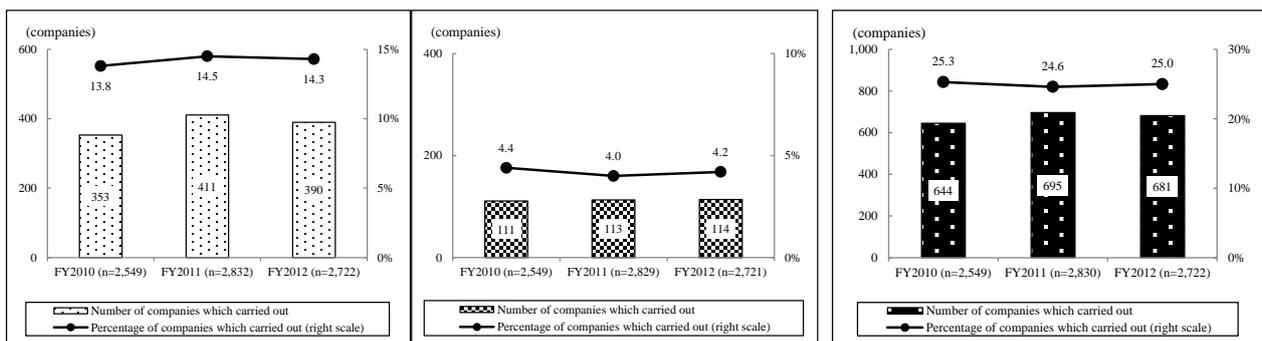


Fig. 5-14 University-related Business Operations

[Business-academia collaboration] [Employee training by utilizing universities] [Cooperation for university education]



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 698 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 FY2012 was 4.1 billion yen (down 0.7%).
- Looking at the composition ratios of the number of companies by sales, companies with less than 1 billion yen decreased.
- Looking at the composition ratios of the number of companies by sector, other publishers accounted for the majority, at 34.4% (down 1.7 points), followed by the number of commercial art and graphic design companies, at 17.6% (down 0.8 points).
- Looking at the composition ratios of sales by sector, sales by newspaper publishers accounted for the majority, at 35.5% (down 3.0 points), followed by sales by other publishers, at 32.1% (down 0.4 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)		
	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)
Total	645	698	8.2	2,662,068	2,860,881	7.5	4,127.2	4,098.7	-0.7
Motion picture & video production companies	56	64	14.3	89,052	90,878	2.1	1,590.2	1,420.0	-10.7
Animation production companies	19	24	26.3	46,973	84,283	79.4	2,472.3	3,511.8	42.0
Recording and disk production companies	14	19	35.7	45,047	92,791	106.0	3,217.6	4,883.7	51.8
Newspaper publishers	100	100	0.0	1,024,092	1,016,402	-0.8	10,240.9	10,164.0	-0.8
Other publishers	233	240	3.0	863,854	917,852	6.3	3,707.5	3,824.4	3.2
Commercial art and graphic design companies	119	123	3.4	416,509	431,114	3.5	3,500.1	3,505.0	0.1
Motion picture, video & TV program distribution companies	12	21	75.0	65,050	114,208	75.6	5,420.8	5,438.5	0.3
Service companies incidental to video picture, sound information, character information production & distribution	92	107	16.3	111,491	113,353	1.7	1,211.9	1,059.4	-12.6
(Special tabulation) Companies that responded to the survey for the second consecutive year	527	527	-	2,280,049	2,298,123	0.8	4,326.5	4,360.8	0.8

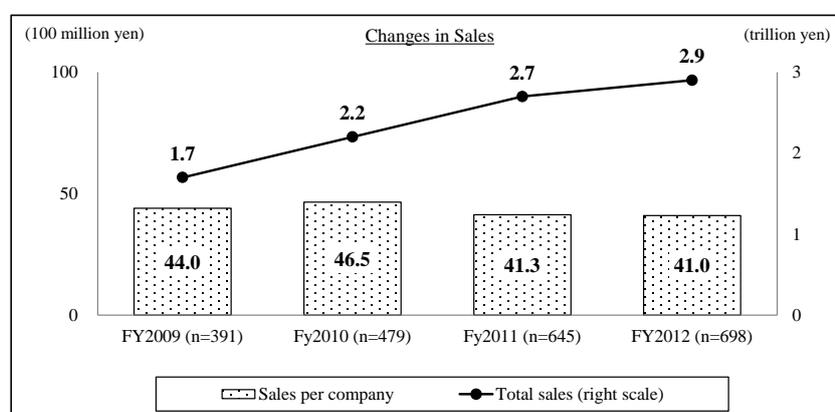


Fig.6-2 Composition Ratios of the Number of Companies by Sales

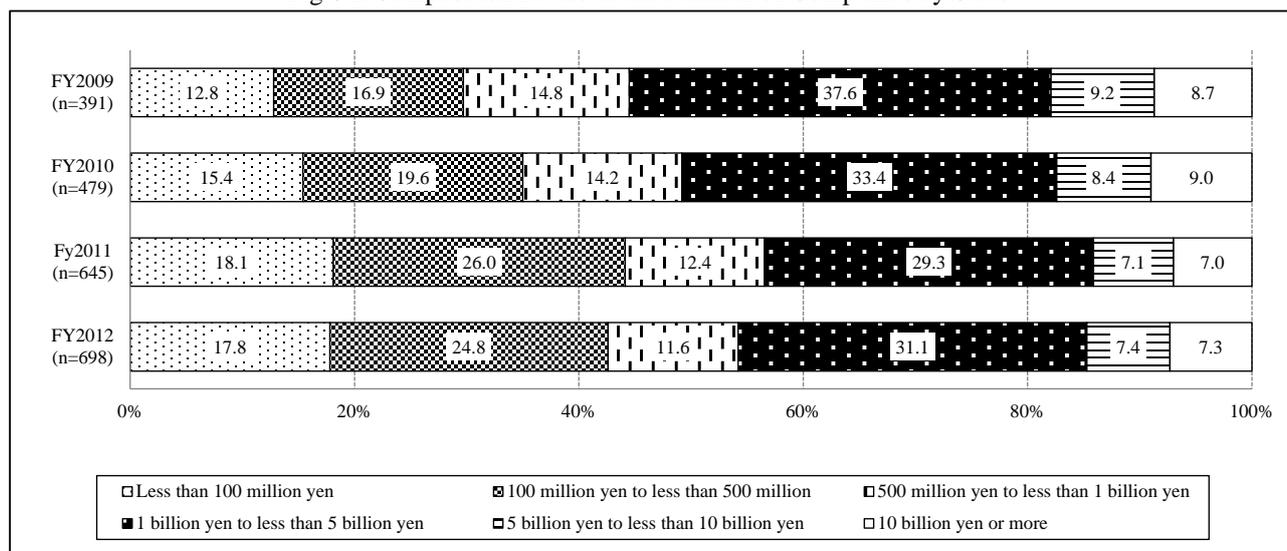
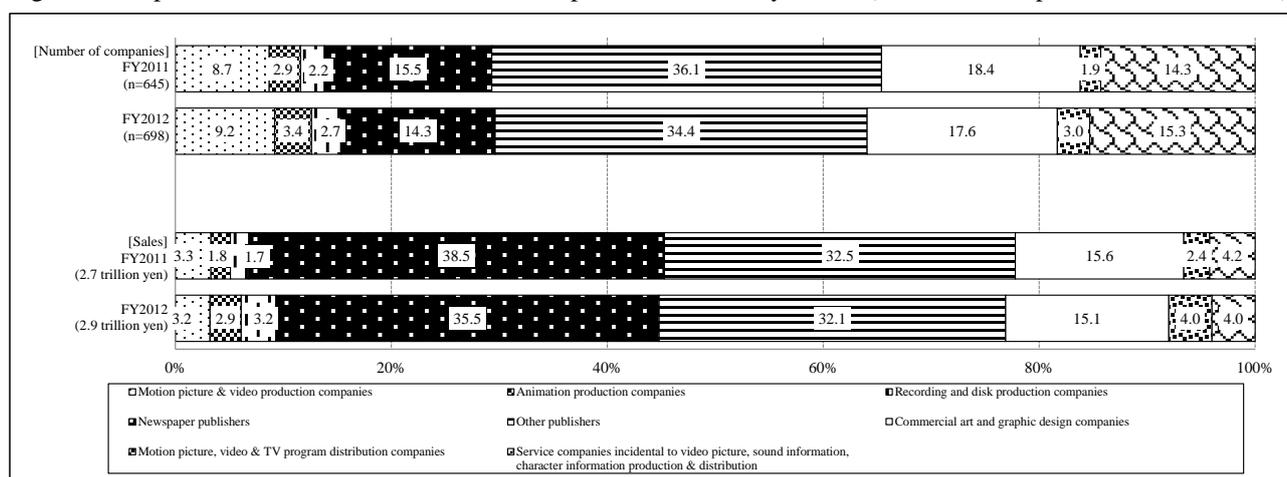


Fig. 6-3 Composition Ratios of the Number of Companies and Sales by Sector (Based on Companies' Main Business)



(Reference: Based on Companies' Activities)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)	FY2011	FY2012	Year-on-year (%)
Total	645	698	8.2	2,662,068	2,860,881	7.5	4,127.2	4,098.7	-0.7
Motion picture & video production service	91	109	19.8	73,663	93,490	26.9	809.5	857.7	6.0
Animation production service	27	32	18.5	47,572	85,282	79.3	1,761.9	2,665.1	51.3
Recording and disk production service	24	26	8.3	47,562	77,018	61.9	1,981.8	2,962.2	49.5
Newspaper publishers	113	112	-0.9	1,015,414	1,004,480	-1.1	8,986.0	8,968.6	-0.2
Other publishers	304	319	4.9	872,384	920,060	5.5	2,869.7	2,884.2	0.5
Commercial art and graphic design service	168	180	7.1	414,944	433,882	4.6	2,469.9	2,410.5	-2.4
Motion picture, video & TV program distribution service	28	39	39.3	66,288	116,165	75.2	2,367.4	2,978.6	25.8
Service incidental to video picture, sound information, character information production & distribution	148	173	16.9	124,241	130,504	5.0	839.5	754.4	-10.1

(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, 59.4% of the companies (up 0.1 points) were already engaged in publication (magazines, newspapers, e-publishing, etc.), and 35.4% (up 1.5 points) in commercial message production, and commercial art and graphic design.
- Of the total number of companies, 43.2% (up 20.7 points) expressed their intention to start delivery through the Internet within one year, and 27.0% (down 10.5 points) expressed their intention to start delivery to mobile devices (mobile phones, mobile AV equipment, etc.).

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

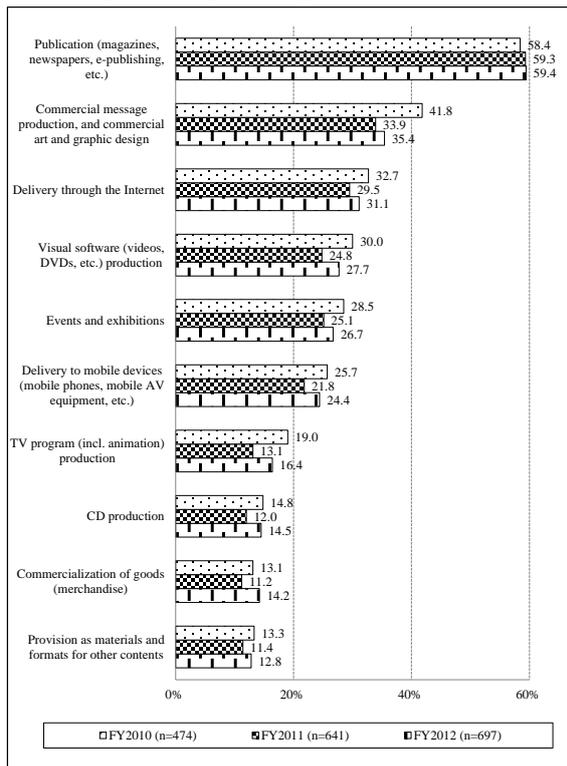
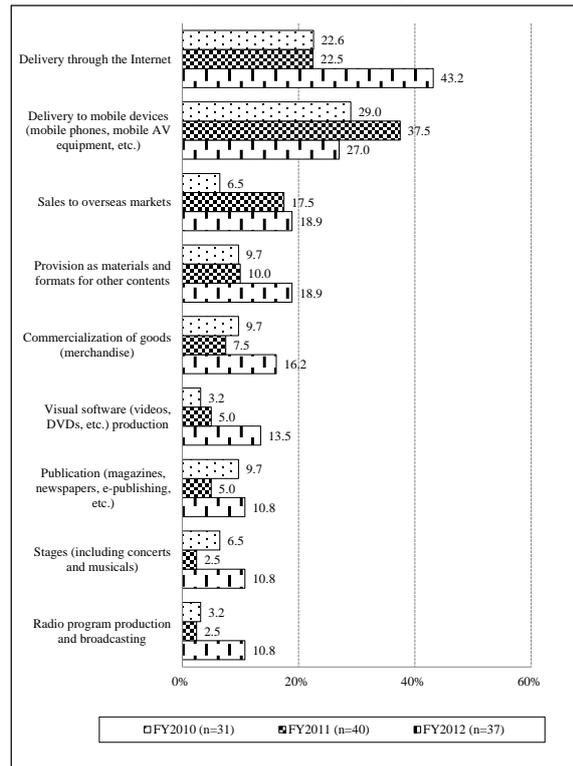


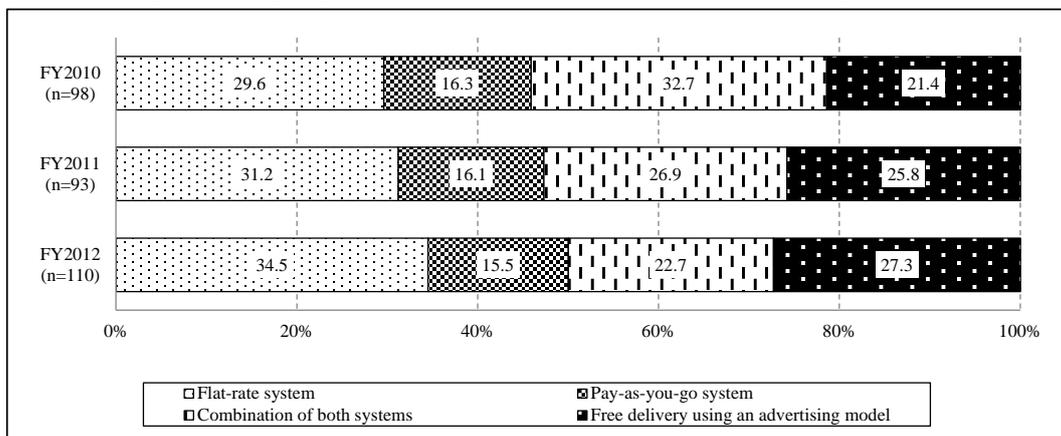
Fig.6-5 Business Operation (Plan to Start Within One Year) (high-ranking) (multiple answers allowed)



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 34.5% (up 3.3 points), followed by free delivery using an advertising model at 27.3% (up 1.5 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 161.4 pieces of contents (up 25.8%).
- Looking at the rights held concerning produced contents, 63.4% of the companies held the full right for primary use, and 61.4% 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 (97.8%), while the percentage of motion picture & video production companies that held the full right for the primary and secondary use was lower than other sectors (10.8% and 22.1%, respectively).

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

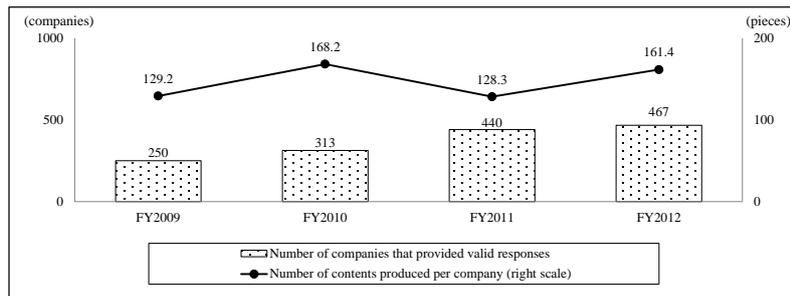
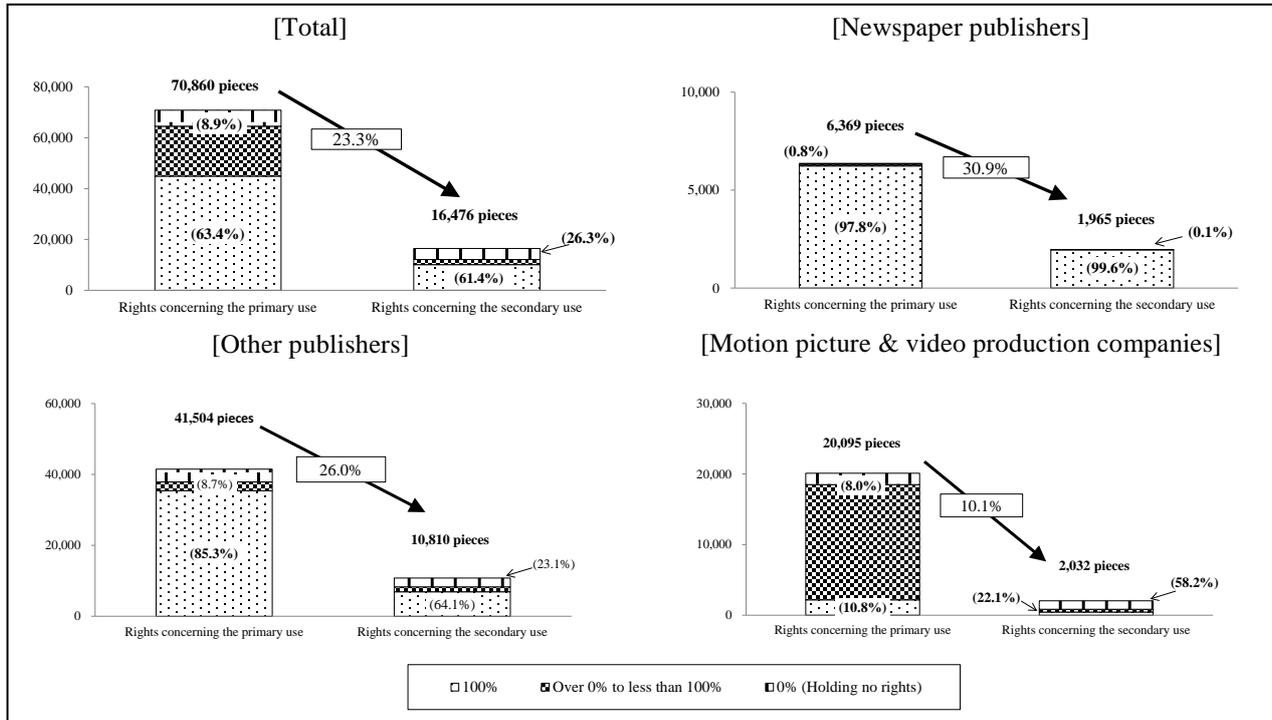


Fig. 6-8 Holding of Rights for Produced Contents

	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)	44,941	2,956	16,649	6,314	70,860
Composition ratios (%)	63.4	4.2	23.5	8.9	100.0
Rights concerning the secondary use (pieces)	10,117	1,129	897	4,333	16,476
Composition ratios (%)	61.4	6.9	5.4	26.3	100.0

(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)



(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 53.4% (down 2.6 points).
- The outsourcing cost per company was 625 million yen (up 14.8%).
- The number of outsourced contents was 29,499 pieces. Among the number of contents outsourced, sales-based payments were adopted in 10.5% of the payments.
- By major sector, newspaper publisher sales-based payments represented 0.2%, which was less than that of other sectors.

Fig. 6-10 Percentages of Companies Implementing Outsourcing

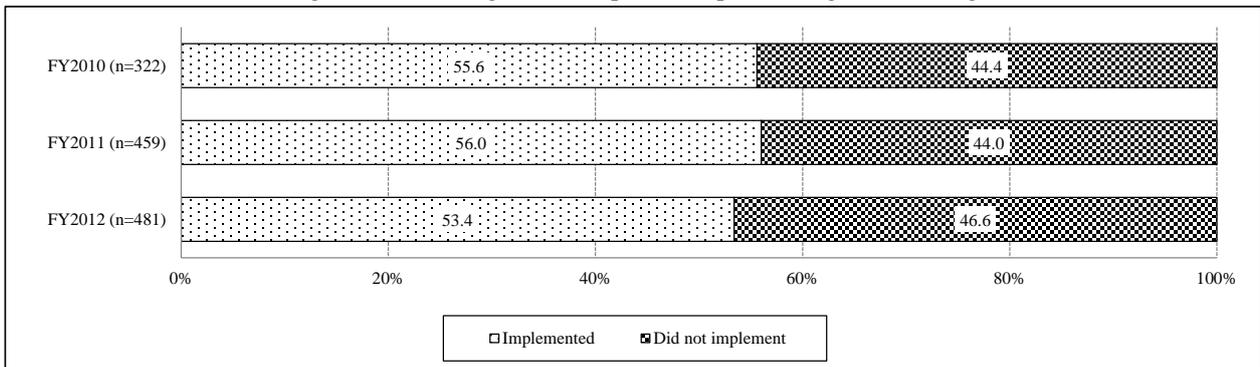


Fig. 6-11 Amount Outsourced Per Company (Major Sectors)

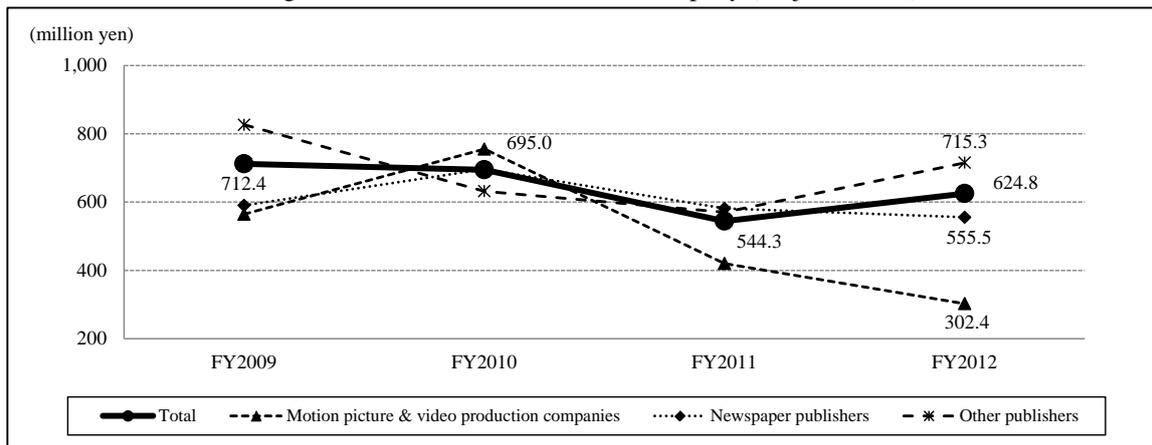
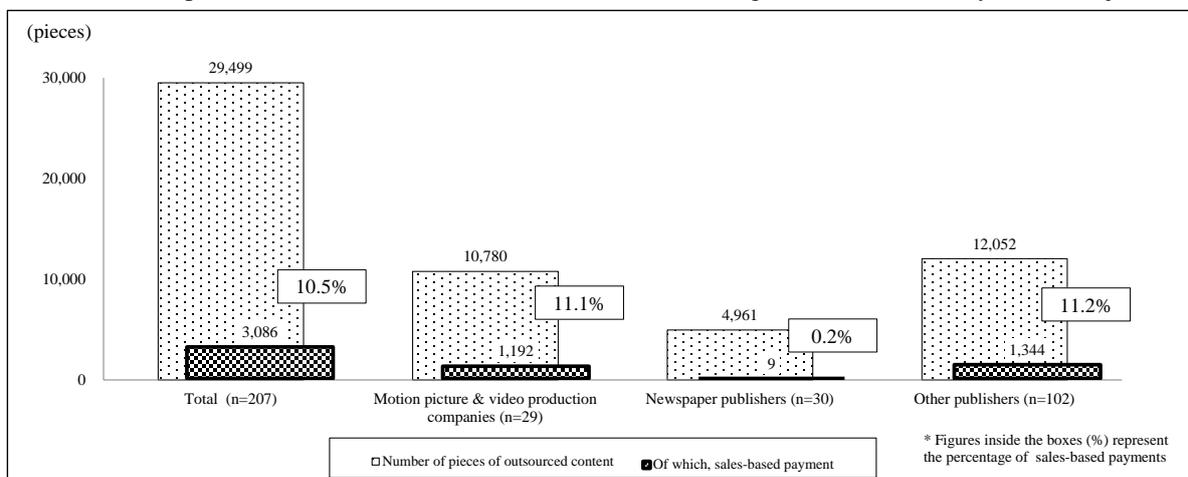


Fig. 6-12 Number of pieces of Outsourced Content and Number/Percentage of Sales-Based Payments (Major Sectors)



(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 84 (down 8.7%). The number of full-time workers was 64 (down 5.9%).
- Looking at the rate of those newly hired and that of resignees for full-time workers were, 2.5% (down 0.2 points) and 3.0% (down 0.2 points), respectively. The rate of contract workers newly hired was 9.5% (down 13.2 points), and that of those with cancelled contracts was 11.4% (down 9.0 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)

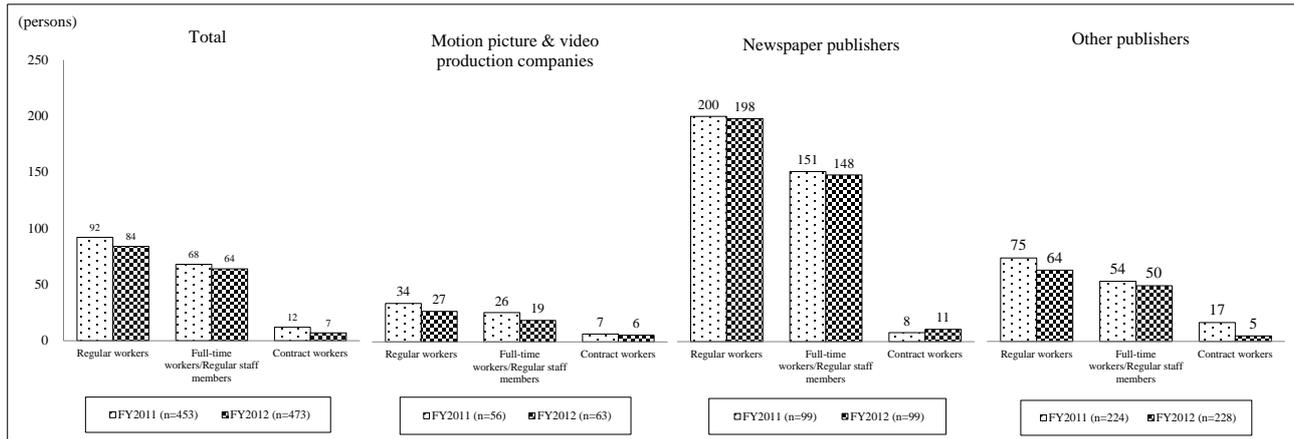
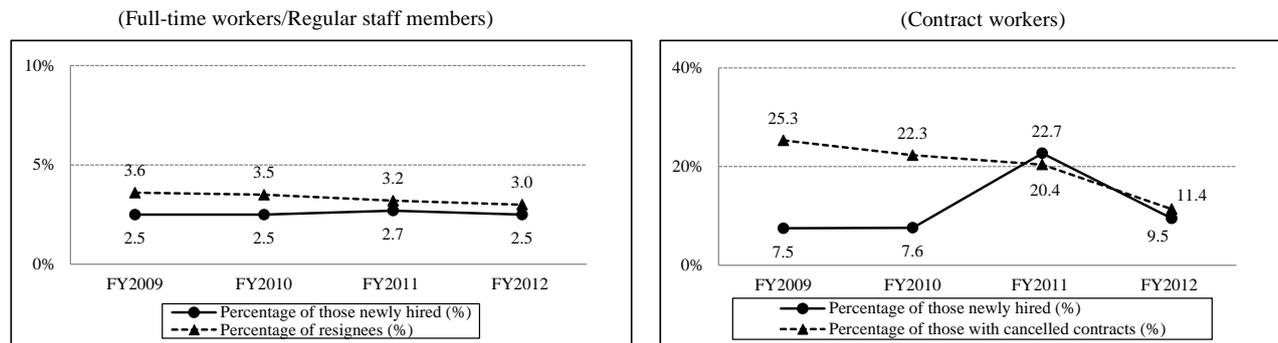


Fig. 6-14 New Hires and Resignees



(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

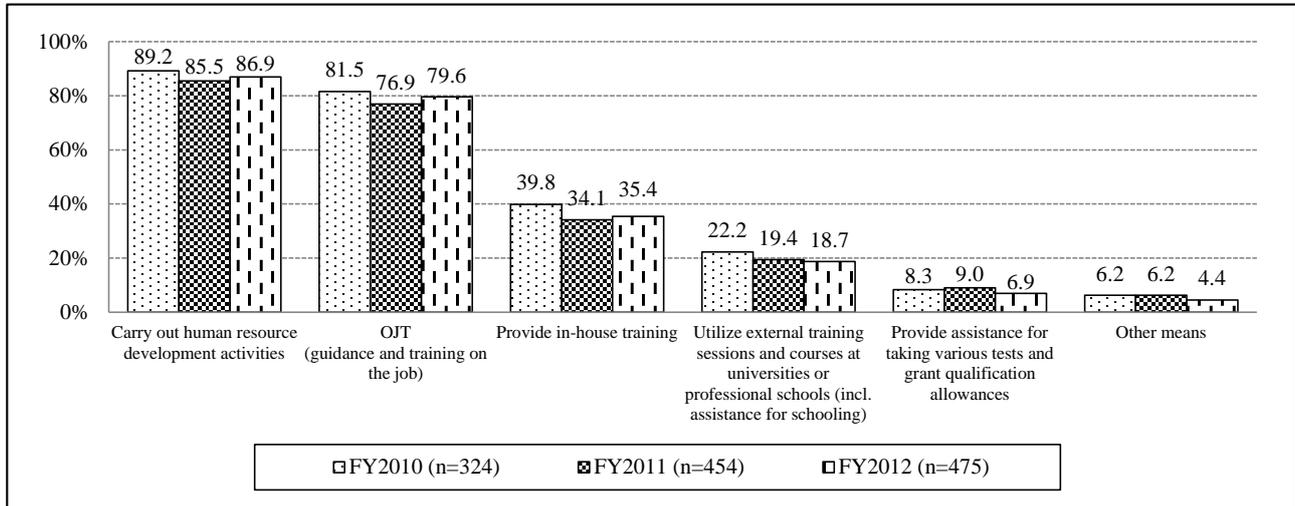
Fig. 6-15 Number of Workers in the Development and Production Section

	FY2009		FY2010		FY2011		FY2012	
		Per company		Per company		Per company		Per company
Number of companies that provided valid responses (companies)	259	-	322	-	453	-	473	-
Number of regular workers (persons)	29,851	115	36,093	112	41,677	92	39,635	84
Full-time workers/Regular staff members	22,524	87	25,127	78	30,726	68	30,061	64
Part-timers	1,198	5	1,149	4	1,777	4	3,124	7
Workers transferred to other companies	583	2	1,111	3	1,429	3	1,000	2
Contract workers	5,257	20	5,832	18	5,614	12	3,305	7
Temporary or daily workers (persons)	263	1	91	0	217	0	160	0
Dispatched workers (persons)	720	3	1,320	4	1,429	3	1,228	3

7. Human resource development in the development and production section

- The percentage of companies that carried out human resource development activities accounted for 86.9% (up 1.4 points). Of them, 79.6% provided OJT (guidance and training on the job) (up 2.7 points).

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



2 Business Organization and Number of Workers

2013 Survey

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

(As of the end of FY2012)

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		
Classification			Number of establishments	Number of regular workers	
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

2013 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 FY2012)

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			

(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.

(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 FY2012)

Percentage of voting rights ownership	Industry classification no.	Number of subsidiaries and affiliates						
		Domestic	Overseas	Overseas			North America	Other areas
				Asia	China (including Hong Kong)	Europe		
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.

(FY2012)

(FY2012)

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.

(1) Assets, liabilities and net assets

(As of the end of FY2012)

Accounting item		million yen				Accounting item		million yen			
ASSETS	Current assets	0400			LIABILITIES AND NET ASSETS	Current liabilities	0401				
	Inventory asset	0402				Payable and account payable	0402				
	Fixed assets	0403				Short-term borrowing (bank and financial institutions)	0403				
	Tangible fixed assets	0404				Short-term borrowing (other than financial institutions)	0404				
	Other than land	0405				Fixed liabilities	0405				
	Intangible fixed assets	0406				Capital bonds (including convertible bonds)	0406				
	Buildings	0407				Long-term borrowing (financial institutions)	0407				
	Investment and other assets	0408				Long-term borrowing (other than financial institutions)	0408				
	Deferred assets	0409				Capital	0409				
	Total assets	0410				Capital surplus	0420				
				Earned surplus	0421						
				Other assets	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 FY2012)

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

(FY2012)

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

(FY2012)

Classification		million yen			
Dividends (excluding interim dividends)	0501				

5 Business Performance

(1) Sales and expenses, etc.

(FY2012)

Accounting item		million yen			
Sales	0501				
Cost of sales	0502				
Sales and general administrative expenses	0503				
Non-operating income	0504				
Non-operating expenses	0505				
Interest expenses, etc.	0506				
Pre-tax 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

(FY2012)

Accounting item		million yen			
Advertising expenses	0511				
Packaging and transportation expenses	0512				
Depreciation costs	0513				
Total amount of special fees (lease payments)	0514				
Printing expenses (incl. management charges)	0515				
Research and development expenses (incl. research fees)	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

(FY2012)

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

(FY2012)

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 control of 50% or more are to be submitted by the Ministry of Finance. Financial Statements Analysis of Corporations by Industry - annual survey form do not need to enter the related survey items (0401-0403, 0431-0433, 0441-0443, and 0514-0517)

6 Business Conditions

2013 Survey

(1) Sales conditions

(FY2012)

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

(FY2012)

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)
 0701 2. Implemented outsourcing other than manufacturing. ⇒ Enter (3) and (4)
 3. Did not implement outsourcing. ⇒ Go to 8

(2) Cost of manufacturing outsourcing at your company

(FY2012)

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)
 0704 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)

Of which, enter information regarding those that are recorded as subcontract cost, agent service fee, etc., in (4).

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

(FY2012)

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

2013 Survey

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

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)
 3. Did not conduct research and development (including commissioned and consigned). ⇒ Go to (3)

(2) Research and development expenses and investment

(FY2012)

Classification		Research and development expenses and investment					
		million yen			Commissioned and consigned with affiliates		
					Domestic		Overseas
million yen			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 Research survey form, do not need to enter the colored survey items (0802~0805).

(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

(FY2012)

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 FY2012)

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

(FY2012)

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 the fiscal year in question, 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

(FY2012)

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



2013 Basic Survey on the Information and Communications Industry (II)

(Telecommunications and Broadcasting)

(As of March 31, 2013)

- ☆ 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, 2013, for this survey and **enter the settlement results for fiscal 2012. 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, 2013.**

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
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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 2013 Basic Survey on the Information and Communications Industry (II) (Telecommunications and Broadcasting)").

< On the whole-company basis >

Category		FY2012 Performance					FY2013 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, FTTH 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	BWA data transmission								
9	Private								
	International								
10	Public WiFi								
11	IDC (Internet Data Center)								
12	Other telecommunication services ()								
13	Total for FY2012								

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

		million yen							
Total forecast sales in the telecommunications business for FY2013									

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 FY2012								

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

(Note 2) Sales of the cable television broadcasting business should be filled in the form "③ Sales by service for the cable television broadcasting business" on the following page.

Total forecast sales in the broadcasting business for FY2013									
--	--	--	--	--	--	--	--	--	--

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 FY2012								

(Note 1) 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 FY2013									

(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

<FY2012>

Category	million yen							
Connection fees, etc.								

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

② Broadcasting business

<FY2012>

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

<FY2012>

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	FY2012 Performance					FY2013 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	FY2012 Performance					FY2013 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	FY2012 Performance					FY2013 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 FY2012 >

(persons)

Classification	Regular workers (excl. temporary or daily workers)				Temporary or daily workers	Dispatched workers
	Full-time workers (excl. workers transferred to other companies)	Part-timers	Workers transferred to other companies			
Telecommunications business						
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 FY2012 ⇒ Enter (2)
 2. Did not implement outsourcing ⇒ Go to 7

② Broadcasting business

1. Implemented outsourcing in FY2012 ⇒ Enter (2)
 2. Did not implement outsourcing ⇒ Go to 7

③ Cable television broadcasting business

1. Implemented outsourcing in FY2012 ⇒ 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

< FY2012 >

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

< FY2012 >

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

<FY2012>

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 (Public WiFi)	25	Server management consignment
4	IDC (Internet Data Center)	26	Other Internet based services
5	ISP (Internet connection service)	27	Software services
6	Satellite communications	28	Data processing and information services
7	International communications	29	Production of digital contents other than websites
8	Terrestrial broadcasting	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

2013 Basic Survey on the Information and Communications Industry (III)

(Broadcast Program Production)

(As of March 31, 2013)

- ☆ 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, 2013, for this survey and **enter the settlement results for fiscal 2012. 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, 2013.**

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

(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	FY2012 Performance				FY2013 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 (FY2012 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 (FY2012 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	FY2012 Performance					FY2013 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 FY2012)			
	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 FY2012 >

(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 FY2012 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 FY2012, 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 FY2012, 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 FY2012				
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 FY2012.

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 FY2012?

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 FY2012 ⇒ 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.

< FY2012 >

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

This is the end of this survey.



2013 Basic Survey on the Information and Communications Industry (IV)

(Internet Based Services)

(As of March 31, 2013)

- ☆ 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, 2013, for this survey and **enter the settlement results for fiscal 2012. 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, 2013.**

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 FY2012							

(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 FY2013	

3 Number of Registered Tenants and Customers

Enter the number of registered tenants and customers as of March 31, 2013.

< As of the end of FY2012 >

	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	FY2012 Performance					FY2013 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 FY2012 ⇒ 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.

< FY2012 >

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 FY2012.

Internet based service business	Number of workers (As of the end of FY2012)	Newly hired full-time workers and contract workers (FY2012)		Resignees and those with cancelled contracts (FY2012)
			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 FY2012 >

	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)					
ISO22301, 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) "ISO22301", "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 (Public WiFi)	25	Server management consignment
4	IDC (Internet Data Center)	26	Other Internet based services
5	ISP (Internet connection service)	27	Software services
6	Satellite communications	28	Data processing and information services
7	International communications	29	Production of digital contents other than websites
8	Terrestrial broadcasting	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



2013 Basic Survey on the Information and Communications Industry (V)

(Information Services)

(As of March 31, 2013)

- ☆ 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, 2013, for this survey and **enter the settlement results for fiscal 2012. 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, 2013.**

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 FY2012	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.

< FY2012 >

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%.

< FY2012 >

		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 FY2012 >

		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					
ISO22301, 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) "ISO22301", "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 FY2012	⇒	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.

<FY2012>

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).

<FY2012>

		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 FY2012 | ⇒ | 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.

<FY2012>

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.

<FY2012>

		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 FY2012.

(persons)

Development and production section (incl. foreigners)		Number of workers (As of the end of FY2012)	Newly hired full-time workers and contract workers		Resignees and those with cancelled contracts (FY2012)
			(FY2012)	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 FY2012)	Newly hired full-time workers and contract workers (FY2012)	Resignees and those with cancelled contracts (FY2012)
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 | <ol 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) | <ol 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.

<FY2012>

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 FY2012.

<FY2012>

		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, 2013.

<As of the end of FY2012>

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.

	Yes	To some extent	Neutral	Not really	No
5807	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.

	Yes	To some extent	Neutral	Not really	No
5808	1	2	3	4	5



2013 Basic Survey on the Information and Communications Industry (VI)

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

(As of March 31, 2013)

- ☆ 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, 2013, for this survey and **enter the settlement results for fiscal 2012. 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, 2013**.

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 FY2012	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 FY2012 >

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

2. Pay-as-you-go system

3. Combination of both systems

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 (production of one of the following contents: Motion picture and video production, except television program and animation production, Animation production, Recording and disk production, Newspaper publishers, Publishers, except newspapers" 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 FY2012.
Count all series with the same title as one.

< FY2012 >

	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, 2013.

< As of the end of FY2012 >

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.

	Close to A	Closer to A than B	Neutral	Closer to B than A	Close to B
5203	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.

< FY2012 >

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%.

< FY2012 >

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

(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 FY2012 ⇒ 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.

< FY2012 >

Category	Outsourcing cost	Percentage of long-term outsourcing partners	Percentage of completely outsourced work
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).

< FY2012 >

Number of outsourced projects, products and contents	Number	Percentage of sales-based payment
		%
	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 FY2012.

(person)

Content production section	Number of workers (As of the end of FY2012)	Newly hired full-time workers and contract workers (FY2012)		Resignees and those with cancelled contracts (FY2012)
			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.

< FY2012 >

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 FY2012 >

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