

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

**2014 Basic Survey on the Information and
Communications Industry
(Performance in FY2013)**

October 28, 2014

**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 2014 Basic Survey on the Information and Communications Industry

Points

- The number of companies engaged in the information and communications business was 5,408, out of which 4,632 companies were operating this as their main business.
- The total sales of these 5,408 companies from the information and communications business were 43.1822 trillion yen. The total sales of the 4,632 companies primarily engaged in this business were 40.6264 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 5,408 and the total sales from this business were 43.1822 trillion yen (the total sales of these 5,408 companies were 70.2851 trillion yen) in FY2013. Sales from this business for companies that responded to the survey for the second consecutive year were 41.4970 trillion yen (up 2.2% 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 78.8% of the total.

The total number of workers was 1,559,912 (up 3.9%) and the productivity was 14.329 million yen/person (up 3.5%).

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 information and communications companies (IC companies) (meaning companies which earn more sales from the IC business than from any other) was 4,632 and their total sales in FY2013 were 44.2390 trillion yen (sales from this business were 40.6264 trillion yen).

The average sales per IC company were 9.55 billion yen (up 3.6%). The average sales per IC company were the largest for telecommunications companies, followed by newspaper publishers and software companies.

Chapter 2: Telecommunications and Broadcasting Business

→ p.4, p.25

The number of companies engaged in the telecommunications and broadcasting business was 1,073 and the total sales in FY2013 were 16.8598 trillion yen. Sales by companies that responded to the survey for the second consecutive year were 15.9218 trillion yen (up 1.3%). By business type, sales were 13.5874 trillion yen for the telecommunications business, 2.1592 trillion yen for the private broadcasting business and 456.2 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 421 and the total sales in FY2013 were 379.1 billion yen. Sales by companies that responded to the survey for the second consecutive year were 273.7 billion yen (up 2.2%).

The average sales per company were 900 million yen (up 4.7%).

Chapter 4: Business of Services Incidental to Internet

→ p.6, p.35

The number of companies engaged in the services incidental to Internet was 577. The total sales in FY2013 were 1.7256 trillion yen (up 23.0%). Sales by companies that responded to the survey for the second consecutive year were 1.4927 trillion yen (up 19.2%).

The average sales per company were 2.99 billion yen (up 17.7%), the first increase in two years.

Chapter 5: Information Service Business

→ p.7, p.39

The number of companies engaged in the information service business was 3,366. The total sales in FY2013 were 14.1443 trillion yen (up 1.0%), for the fourth consecutive year of increase. Sales by companies that responded to the survey for the second consecutive year were 13.1243 trillion yen (up 3.4%). By sector, custom software service companies accounted for the majority.

The average sales per company were 4.20 billion yen (up 1.5%), for the fourth consecutive year of increase.

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

→ p.8, p.45

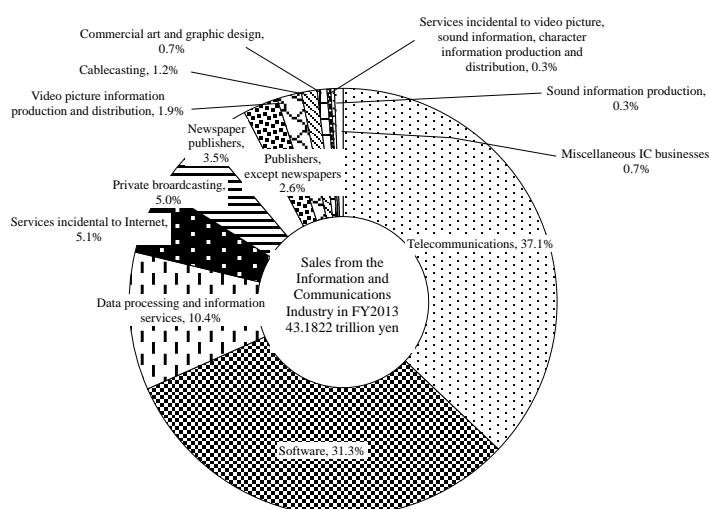
The number of companies engaged in the video picture information, sound information, character information production and distribution business was 708. The total sales in FY2013 were 2.8677 trillion yen (0.0 points difference). Sales by companies that responded to the survey for the second consecutive year were 2.5689 trillion yen (down 1.3%). By sector, newspaper publishers accounted for the majority.

The average sales per company were 4.05 billion yen (down 0.5%) and decreased for motion picture, video and television program distribution.

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

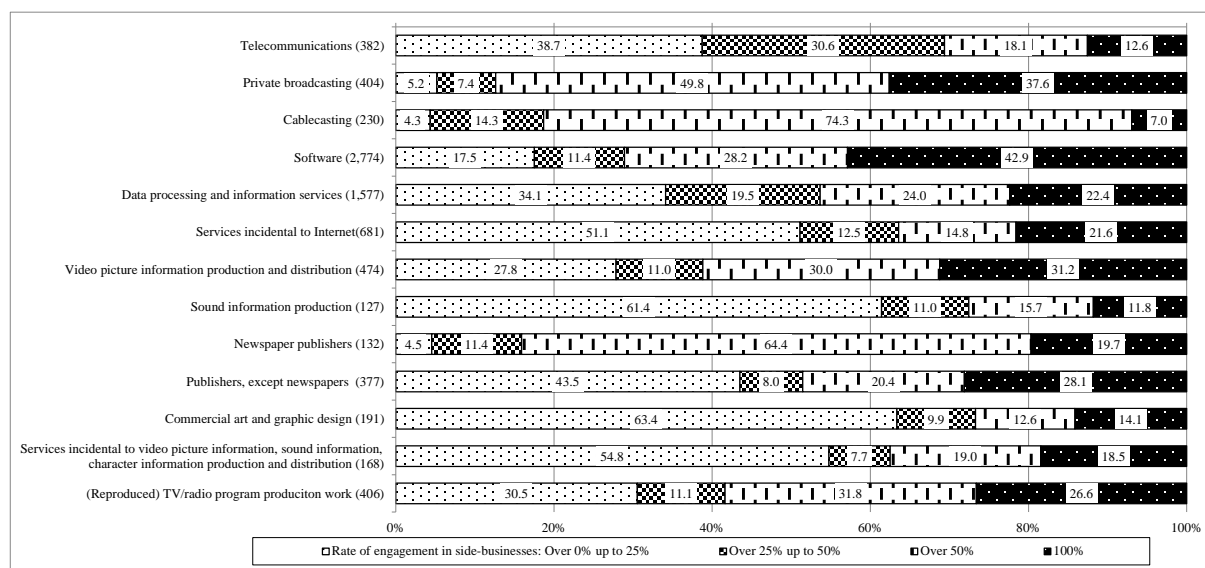
- The total number of companies engaged in the information and communications business (meaning companies that engage in this business, whether as their main business or not) was 5,408 and the total sales from this business were 43.1822 trillion yen (the total sales of these 5,408 companies were 70.2851 trillion yen) in FY2013.
- Sales were the largest for the telecommunications business, followed by the software business, and the data processing and information services business. These three businesses accounted for 78.8% of the total.
- Looking at the 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, 93.0% of cablecasting companies, and 88.2% of sound information production companies were engaged in side-businesses.

Sales from the Information and Communications Business in FY2013



| | Number of companies | Sales from the relevant business Sales (100 million yen) | Composition ratio (%) |
|--|---------------------|--|-----------------------|
| Overall | 5,408 | 431,822 | 100.0 |
| Telecommunications | 382 | 160,088 | 37.1 |
| Software | 2,774 | 135,056 | 31.3 |
| Data processing and information services | 1,577 | 44,999 | 10.4 |
| Services incidental to Internet | 681 | 22,030 | 5.1 |
| Private broadcasting | 404 | 21,446 | 5.0 |
| Newspaper publishers | 132 | 15,259 | 3.5 |
| Publishers, except newspapers | 377 | 11,400 | 2.6 |
| Video picture information production and distribution | 474 | 8,025 | 1.9 |
| Cablecasting | 230 | 5,129 | 1.2 |
| Commercial art and graphic design | 191 | 3,164 | 0.7 |
| Services incidental to video picture information, sound information, character information production and distribution | 168 | 1,259 | 0.3 |
| Sound information production | 127 | 1,157 | 0.3 |
| Miscellaneous IC businesses | - | 2,809 | 0.7 |

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

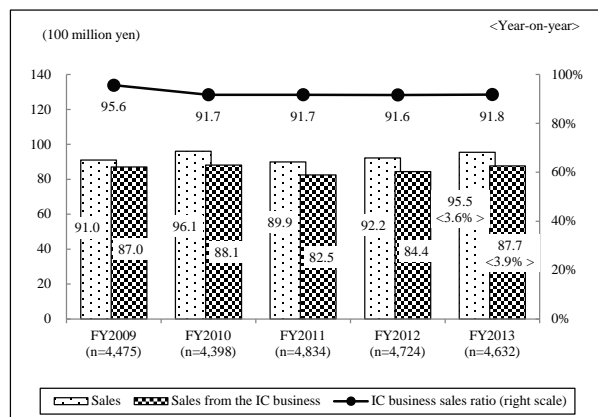
- Looking at companies rated as information and communications companies (IC companies) (meaning companies which earn more sales from the IC business than from any other), per IC company, the average number of establishments was 3.6 (up 0.2 establishments), the number of regular workers was 231 (up 3.6%).
- The average sales per IC company were 9.55 billion yen (up 3.6%). Of the total sales, those from the information and communications business averaged 8.77 billion yen (up 3.9%), making up 91.8% of sales (up 0.2 points).
- The average operating profit per IC company was 910 million yen (up 9.5%), and ordinary profit per IC company was 950 million yen (up 9.3%). Average current net income per IC company was 480 million yen (up 2.1%).

Outline of IC Companies (Per Company)

| | | Number of establishments | Number of workers (persons) | Number of regular workers (persons) | Sales (million yen) | Sales from the IC business (million yen) | Operating profit (million yen) | Ordinary profit (million yen) |
|--|------------------|--------------------------|--------------------------------|--|------------------------|---|-----------------------------------|----------------------------------|
| | | | | | | | | |
| IC companies | FY2012 | 3.4 | 224 | 223 | 9,217.9 | 8,440.0 | 830.6 | 873.6 |
| | FY2013 | 3.6 | 232 | 231 | 9,550.7 | 8,770.8 | 909.9 | 954.9 |
| | Year-on-year (%) | 0.2 | 3.6 | 3.6 | 3.6 | 3.9 | 9.5 | 9.3 |
| Telecommunications | FY2012 | 7.1 | 736 | 730 | 140,702.2 | 133,251.2 | 18,086.8 | 19,301.3 |
| | FY2013 | 8.3 | 681 | 679 | 129,859.4 | 121,484.4 | 17,399.3 | 18,240.6 |
| | Year-on-year (%) | 1.2 | -7.5 | -7.0 | -7.7 | -8.8 | -3.8 | -5.5 |
| Private broadcasting | FY2012 | 2.8 | 85 | 83 | 7,326.8 | 7,102.9 | 456.2 | 466.2 |
| | FY2013 | 2.8 | 76 | 75 | 6,162.4 | 5,887.0 | 379.7 | 406.2 |
| | Year-on-year (%) | 0.0 | -10.6 | -9.6 | -15.9 | -17.1 | -16.8 | -12.9 |
| Cablecasting | FY2012 | 2.4 | 67 | 67 | 2,847.6 | 2,814.7 | 538.4 | 261.0 |
| | FY2013 | 2.6 | 75 | 75 | 3,552.9 | 3,504.8 | 587.5 | 407.4 |
| | Year-on-year (%) | 0.2 | 11.9 | 11.9 | 24.8 | 24.5 | 9.1 | 56.1 |
| Software | FY2012 | 2.8 | 247 | 247 | 5,902.9 | 5,150.7 | 347.0 | 372.3 |
| | FY2013 | 2.8 | 262 | 262 | 6,810.6 | 6,041.8 | 410.7 | 442.1 |
| | Year-on-year (%) | 0.0 | 6.1 | 6.1 | 15.4 | 17.3 | 18.4 | 18.7 |
| Data processing and information services | FY2012 | 4.2 | 308 | 307 | 6,646.3 | 5,869.8 | 436.8 | 456.8 |
| | FY2013 | 4.8 | 313 | 311 | 5,328.2 | 4,837.8 | 373.8 | 371.9 |
| | Year-on-year (%) | 0.6 | 1.6 | 1.3 | -19.8 | -17.6 | -14.4 | -18.6 |
| Services incidental to Internet | FY2012 | 2.3 | 144 | 144 | 5,037.3 | 4,726.8 | 822.2 | 846.5 |
| | FY2013 | 2.7 | 177 | 177 | 6,498.1 | 6,265.3 | 1,293.9 | 1,365.6 |
| | Year-on-year (%) | 0.4 | 22.9 | 22.9 | 29.0 | 32.5 | 57.4 | 61.3 |
| Video picture information production and distribution | FY2012 | 1.8 | 80 | 78 | 2,916.3 | 2,588.4 | 207.3 | 241.1 |
| | FY2013 | 1.6 | 73 | 72 | 2,643.5 | 2,355.2 | 191.4 | 220.8 |
| | Year-on-year (%) | -0.2 | -8.8 | -7.7 | -9.4 | -9.0 | -7.7 | -8.4 |
| TV program production | FY2012 | 1.6 | 75 | 74 | 2,212.8 | 2,082.4 | 100.8 | 121.5 |
| | FY2013 | 1.5 | 70 | 69 | 1,878.0 | 1,793.9 | 90.2 | 109.0 |
| | Year-on-year (%) | -0.1 | -6.7 | -6.8 | -15.1 | -13.9 | -10.5 | -10.3 |
| Sound information production | FY2012 | 1.4 | 32 | 32 | 3,472.0 | 3,034.8 | 269.9 | 255.4 |
| | FY2013 | 1.3 | 26 | 26 | 2,884.4 | 2,492.8 | 238.4 | 245.5 |
| | Year-on-year (%) | -0.1 | -18.8 | -18.8 | -16.9 | -17.9 | -11.7 | -3.9 |
| Radio program production | FY2012 | 1.1 | 14 | 14 | 187.1 | 170.1 | 3.9 | 4.4 |
| | FY2013 | 1.1 | 11 | 11 | 105.5 | 98.1 | 3.2 | 3.2 |
| | Year-on-year (%) | 0.0 | -21.4 | -21.4 | -43.6 | -42.3 | -17.9 | -27.3 |
| Newspaper publishers | FY2012 | 18.6 | 377 | 369 | 16,462.4 | 14,766.3 | 560.3 | 651.4 |
| | FY2013 | 17.1 | 344 | 338 | 14,911.4 | 13,330.3 | 562.3 | 666.4 |
| | Year-on-year (%) | -1.5 | -8.8 | -8.4 | -9.4 | -9.7 | 0.4 | 2.3 |
| Publishers, except newspapers | FY2012 | 3.4 | 132 | 131 | 5,704.9 | 5,486.5 | 163.3 | 233.1 |
| | FY2013 | 3.3 | 134 | 133 | 5,661.1 | 5,496.8 | 150.3 | 243.6 |
| | Year-on-year (%) | -0.1 | 1.5 | 1.5 | -0.8 | 0.2 | -8.0 | 4.5 |
| Commercial art and graphic design | FY2012 | 1.8 | 52 | 52 | 1,526.8 | 1,462.6 | 71.2 | 75.5 |
| | FY2013 | 2.2 | 48 | 48 | 1,368.3 | 1,345.5 | 68.9 | 71.3 |
| | Year-on-year (%) | 0.4 | -7.7 | -7.7 | -10.4 | -8.0 | -3.2 | -5.6 |
| Services incidental to video picture information, sound information, character information production and distribution | FY2012 | 3.4 | 75 | 75 | 1,512.0 | 1,301.3 | 32.2 | 48.4 |
| | FY2013 | 3.5 | 103 | 97 | 1,744.3 | 1,459.9 | 34.9 | 51.3 |
| | Year-on-year (%) | 0.1 | 37.3 | 29.3 | 15.4 | 12.2 | 8.4 | 6.0 |

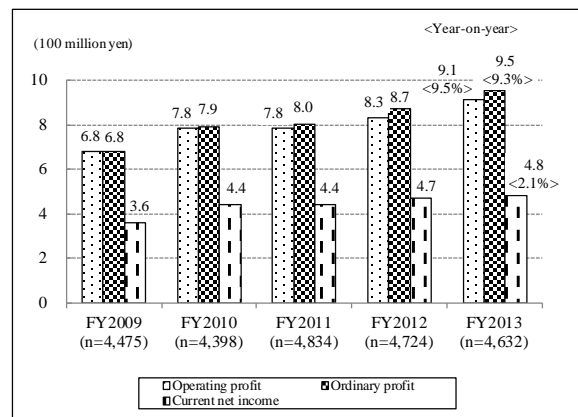
(Note) The year-on-year comparison for the number of establishments per company represents the difference as compared to the previous fiscal year.

Sales per IC Company



(Note) Year-on-year comparison is calculated in 1 million yen units.

Profit per IC Company



(Note) Year-on-year comparison is calculated in 1 million yen units.

Points of Chapter 2: Telecommunications and Broadcasting

- The total sales in the telecommunications and broadcasting business were 16.8598 trillion yen in FY2013. Among this, sales by companies that responded to the survey for the second consecutive year were 15.9218 trillion yen (up 1.3%). Looking at sales in FY2013 by business type, sales were 13.5874 trillion yen for the telecommunications business, 2.1592 trillion yen for the private broadcasting business, and 456.2 billion yen for the cable television broadcasting business.
- In terms of the 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 23.0% and 34.0% respectively. Private broadcasting businesses intending to start “Internet advertising” were the highest, at 21.4%.

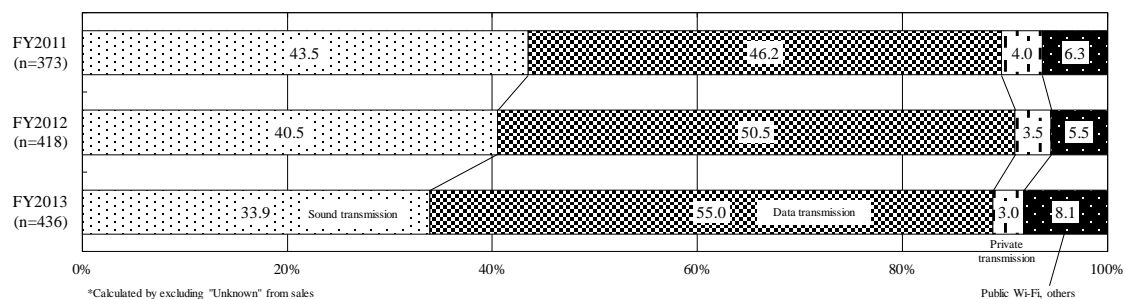
Sales of Telecommunications and Broadcasting Business by Business Type

(unit: companies, 100 million yen)

| Classification | FY2013 | | (Special tabulation) Companies that responded to the survey for the second consecutive year | | | | |
|-------------------------------|---------------------|---------|---|---------|---------------------|---------|------------------|
| | Number of companies | Sales | FY2012 | | FY2013 | | |
| | | | Number of companies | Sales | Number of companies | Sales | Year-on-year (%) |
| Overall | 1,073 | 168,598 | 866 | 157,161 | 866 | 159,218 | 1.3 |
| Telecommunications | 436 | 135,874 | 340 | 128,115 | 340 | 128,748 | 0.5 |
| Broadcasting | 637 | 32,724 | 526 | 29,047 | 526 | 30,470 | 4.9 |
| Private broadcasting | 412 | 21,592 | 337 | 18,606 | 337 | 19,731 | 6.0 |
| Cable television broadcasting | 224 | 4,562 | 188 | 3,837 | 188 | 4,169 | 8.6 |
| NHK | 1 | 6,570 | 1 | 6,604 | 1 | 6,570 | -0.5 |

*Data for NHK are based on publicized materials.

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



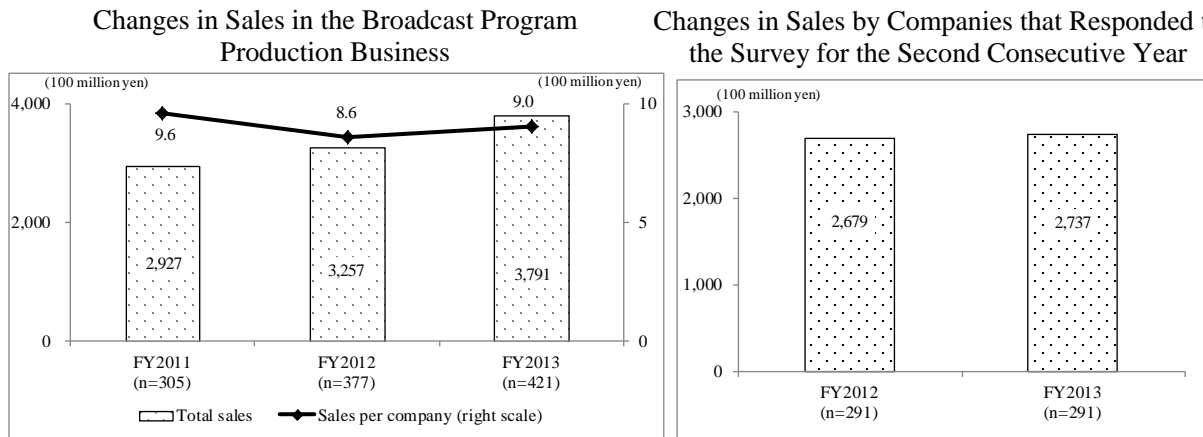
New Businesses that Companies Intend to Start within One Year (Multiple answers allowed)

| Telecommunications | | | Private broadcasting | | | Cable television broadcasting | | |
|---|----------------|----------------|---|----------------|----------------|---|----------------|----------------|
| New businesses that companies intend to start within one year | FY2012 (n=167) | FY2013 (n=161) | New businesses that companies intend to start within one year | FY2012 (n=114) | FY2013 (n=103) | New businesses that companies intend to start within one year | FY2012 (n=100) | FY2013 (n=103) |
| FTTH services | 23.4 | 23.0 | Internet advertising | 21.1 | 21.4 | FTTH services | 37.0 | 34.0 |
| Other services incidental to Internet | 13.2 | 16.8 | Web contents delivery | 17.5 | 19.4 | Wireless Internet access (public Wi-Fi) | 20.0 | 16.5 |
| Wireless Internet access (public Wi-Fi) | 15.6 | 13.0 | Of which, IPTV services | | | Other services incidental to Internet | 11.0 | 11.7 |
| Information network and security services | 9.0 | 12.4 | (Internet video delivery) | 7.0 | 3.9 | Cable Internet | 11.0 | 11.7 |
| Cloud computing services | 16.2 | 11.8 | Other services incidental to Internet | 14.9 | 11.7 | Of which, IPTV services | | |
| Other | 17.4 | 16.1 | Production of digital contents other than Web sites | 7.9 | 10.7 | (Internet video delivery) | 10.0 | 9.7 |
| | | | Other | 28.9 | 25.2 | Other | 21.0 | 20.4 |

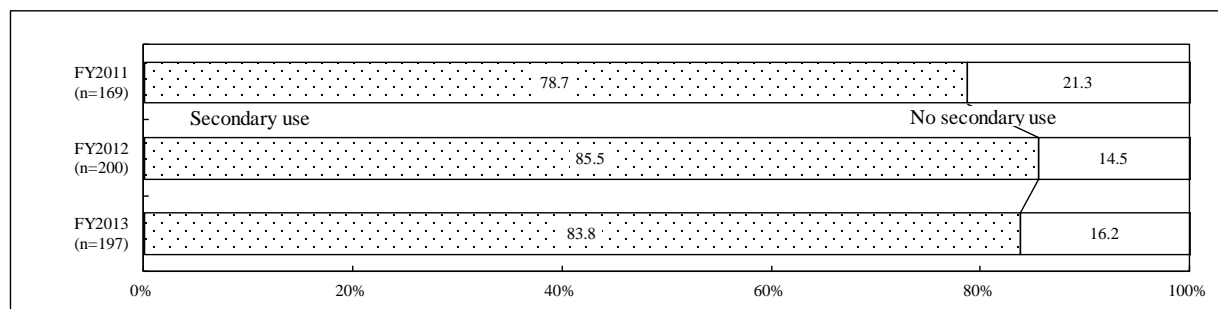
(Note) Values represent the ratio of companies that responded that they were intending to start new businesses within one year.

Points of Chapter 3: Broadcast Program production

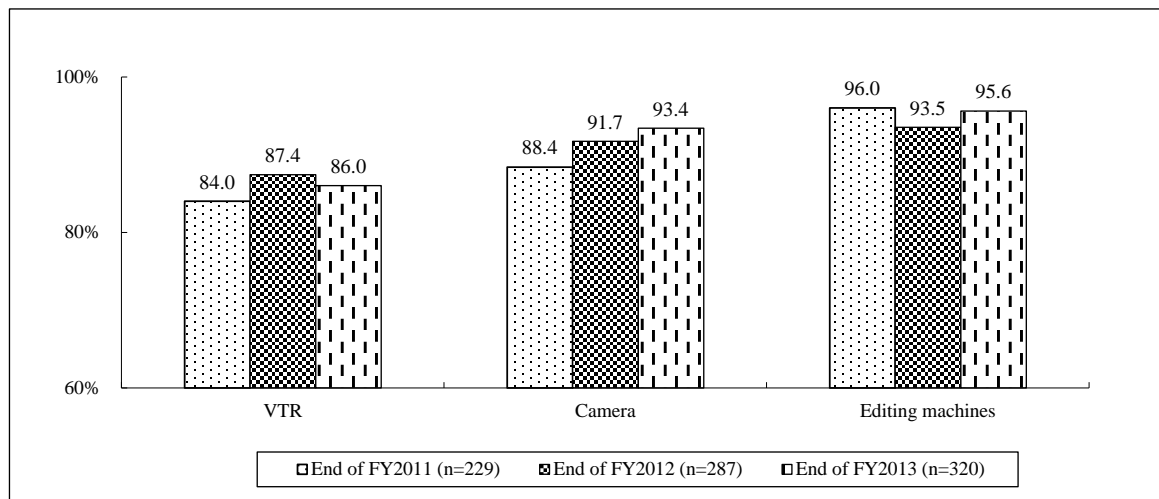
- The total sales in FY2013 were 379.1 billion yen, among which the total sales by companies that responded to the survey for the second consecutive year were 273.7 billion yen (up 2.2%). The average sales per company were 900 million yen (up 4.7%)
- With regard to broadcast programs for which secondary use is possible based on a company's own intent, the percentage of broadcast program producers that are actually carrying out secondary use decreased to 83.8% (down 1.7 points).
- The rate of digitalization of equipment used for the broadcast program production business exceeded 80% for VTRs, cameras and editing machines. Cameras and editing machines also accounted for over 90% of digitalization.



Secondary Use of Television Broadcast Programs



Changes in Digitalization Ratios of equipment Used for the Broadcast Program Production Business



Points of Chapter 4: Business of Services Incidental to Internet

- The total sales in FY2013 were 1.7256 trillion yen (up 23.0%), the largest since the start of the survey.
- The sales per company were 2.99 billion yen (up 17.7%). By Service type, sales increased mainly in web content delivery services, shopping site operation and auction site operation.
- Regarding new business fields that companies intend to start within one year, “Cloud computing services” and “Web contents delivery services” were mentioned by many companies (23.8% and 18.5%, respectively).

Number of Companies and Sales by Service Type (Based on Companies' Activities)

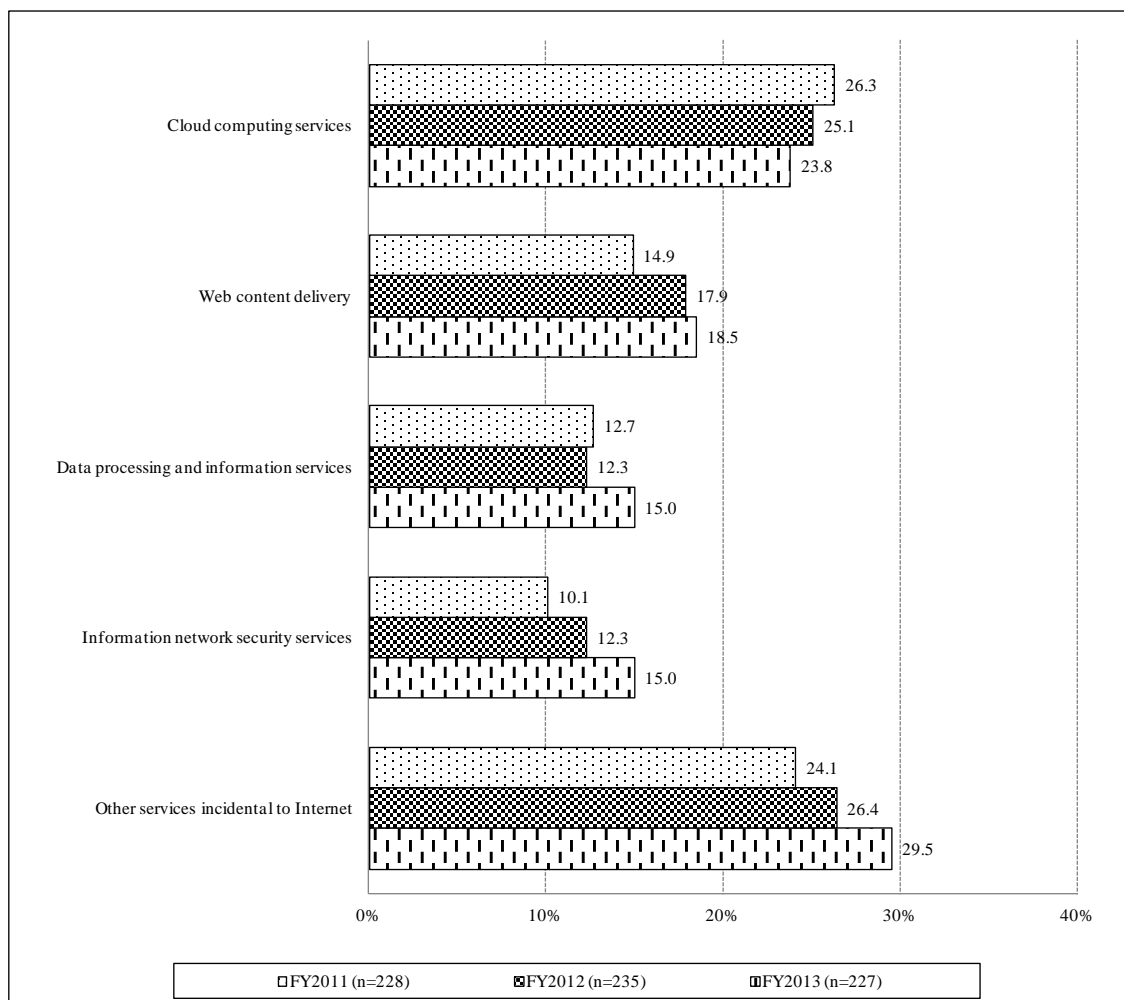
| | Number of companies | | | Sales (million yen) | | | Sales per company (million yen) | | |
|---|---------------------|--------|------------------|---------------------|-----------|------------------|---------------------------------|---------|------------------|
| | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) |
| Total | 552 | 577 | 4.5 | 1,402,557 | 1,725,641 | 23.0 | 2,540.9 | 2,990.7 | 17.7 |
| Web information search services | 65 | 66 | 1.5 | 140,428 | 147,435 | 5.0 | 2,160.4 | 2,233.9 | 3.4 |
| Shopping site operation and auction site operation | 82 | 80 | -2.4 | 178,373 | 201,235 | 12.8 | 2,175.3 | 2,515.4 | 15.6 |
| Electronic bulletin board services, blog services, and SNS operation | 22 | 25 | 13.6 | 166,691 | 160,058 | -4.0 | 7,576.9 | 6,402.3 | -15.5 |
| Web content delivery services | 155 | 149 | -3.9 | 234,891 | 419,268 | 78.5 | 1,515.4 | 2,813.9 | 85.7 |
| Revenue from IPTV services | 14 | 16 | 14.3 | 6,942 | 54,761 | 688.8 | 495.9 | 3,422.6 | 590.2 |
| Cloud computing services | 123 | 139 | 13.0 | 80,214 | 94,314 | 17.6 | 652.1 | 678.5 | 4.0 |
| Electronic authentication services | 13 | 10 | -23.1 | 11,804 | 4,345 | -63.2 | 908.0 | 434.5 | -52.1 |
| Information network security services | 60 | 63 | 5.0 | 55,729 | 50,300 | -9.7 | 928.8 | 798.4 | -14.0 |
| Charging/settlement agent services | 22 | 28 | 27.3 | 126,659 | 144,678 | 14.2 | 5,757.2 | 5,167.1 | -10.2 |
| Server management consignment | 103 | 103 | 0.0 | 49,866 | 50,334 | 0.9 | 484.1 | 488.7 | 1.0 |
| Other services incidental to Internet | 159 | 186 | 17.0 | 350,645 | 446,718 | 27.4 | 2,205.3 | 2,401.7 | 8.9 |
| (Special tabulation) Companies that responded to the survey for the second consecutive year | 436 | 436 | - | 1,251,807 | 1,492,667 | 19.2 | 2,871.1 | 3,423.5 | 19.2 |

(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.

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



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

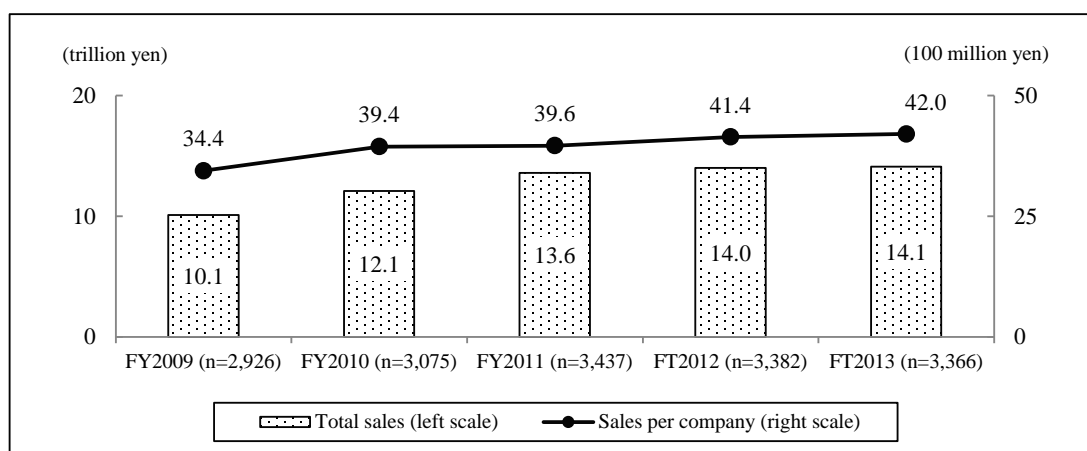
Points of Chapter 5: Information Services

- The total sales in FY2013 were 14.1443 trillion yen (up 1.0%), for the fourth consecutive year of increase. The sales increased mainly in custom software service companies and game software service companies.
- The sales per company were 4.20 billion yen (up 1.5%), with an increase in sales by package software service companies and game software service companies.
- Looking at the percentage of the number of companies according to primary contractors and subcontractors, primary contractors accounted for 86.1% (down 0.4 points). By capital, the percentage of primary contractors increased, and the percentage of subcontractors decreased as capital was larger.

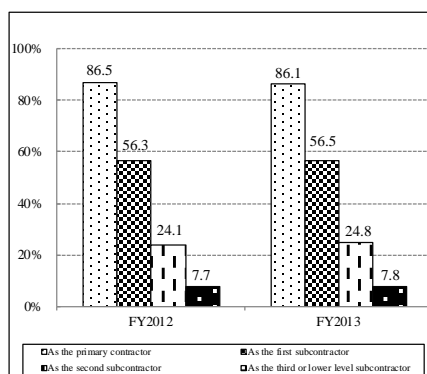
Number of Companies and Sales by Sector (Based on Main Business)

| | Number of companies | | | Sales (million yen) | | | Sales per company (million yen) | | |
|---|---------------------|--------|------------------|---------------------|------------|------------------|---------------------------------|---------|------------------|
| | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) |
| Total | 3,382 | 3,366 | -0.5 | 13,998,464 | 14,144,288 | 1.0 | 4,139.1 | 4,202.1 | 1.5 |
| Custom software service companies | 1,652 | 1,676 | 1.5 | 6,937,818 | 7,072,542 | 1.9 | 4,199.6 | 4,219.9 | 0.5 |
| Embedded software service companies | 110 | 98 | -10.9 | 183,662 | 161,796 | -11.9 | 1,669.7 | 1,651.0 | -1.1 |
| Package software service companies | 279 | 276 | -1.1 | 390,068 | 466,441 | 19.6 | 1,398.1 | 1,690.0 | 20.9 |
| Game software service companies | 63 | 65 | 3.2 | 480,631 | 558,242 | 16.1 | 7,629.1 | 8,588.3 | 12.6 |
| Data processing service companies | 642 | 595 | -7.3 | 2,891,529 | 2,805,273 | -3.0 | 4,503.9 | 4,714.7 | 4.7 |
| Information service companies | 117 | 123 | 5.1 | 217,393 | 228,709 | 5.2 | 1,858.1 | 1,859.4 | 0.1 |
| Market research, opinion survey and social survey service companies | - | 52 | - | - | 86,195 | - | - | 1,657.6 | - |
| Miscellaneous information service companies | 519 | 481 | -7.3 | 2,897,363 | 2,765,090 | -4.6 | 5,582.6 | 5,748.6 | 3.0 |
| (Special tabulation) Companies that responded to the survey for the second consecutive year | 2,880 | 2,880 | - | 12,694,298 | 13,124,310 | 3.4 | 4,407.7 | 4,557.1 | 3.4 |

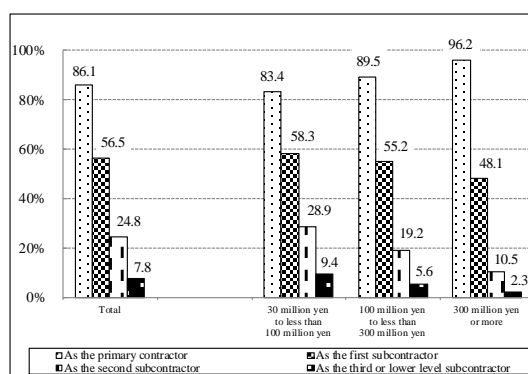
Changes in sales



Percentage of Number of Contractors and Subcontractors



Percentage of Number of Primary Contractors and Subcontractors 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:

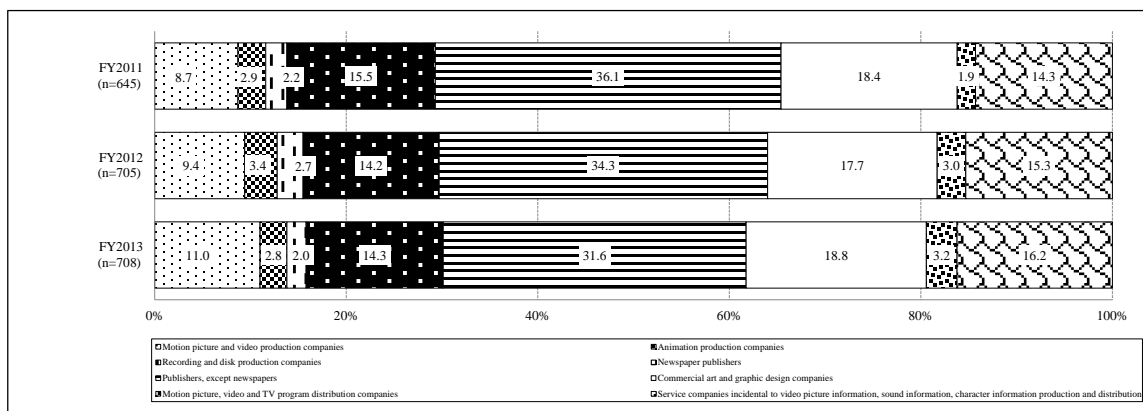
Video Picture Information, Sound Information, Character Information Production and Distribution

- The total sales in FY2013 were 2.8677 trillion yen (0.0 points difference). By sector, sales were the largest for newspaper publishers, followed by publishers, except newspapers, and commercial art and graphic design companies.
- The average sales per company were 4.05 billion yen (down 0.5%) and decreased for motion picture, video, and television program distribution companies and others.
- Looking at the ratios of the number of companies and sales by sector, publishers, excluding newspapers are the largest sector in terms of the number of companies, accounting for 31.6%, while newspaper publishers are the largest in sales, with a share of 37.3%.

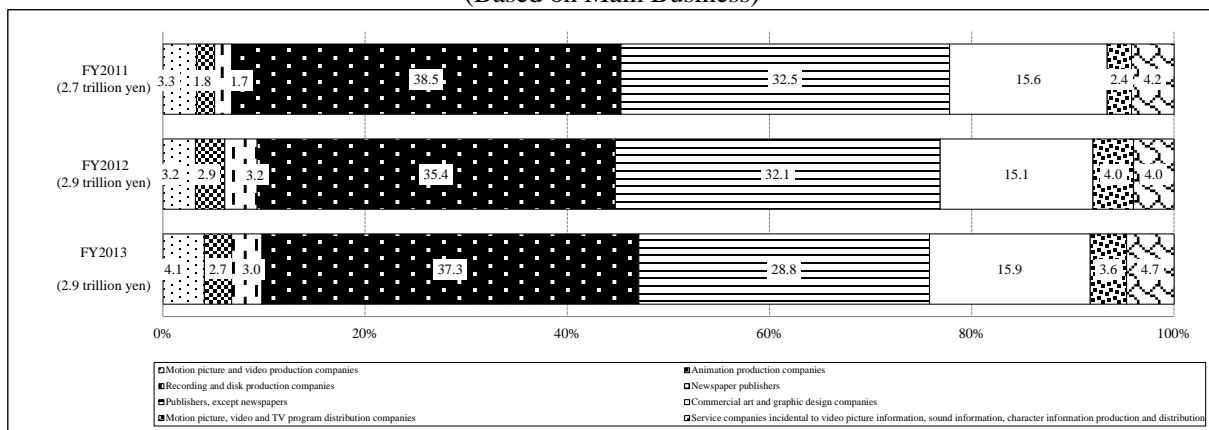
Number of Companies and Sales by Sector (Based on Main Business)

| | Number of companies | | | Sales (million yen) | | | Sales per company (million yen) | | |
|---|---------------------|--------|------------------|---------------------|-----------|------------------|---------------------------------|----------|------------------|
| | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) |
| Total | 705 | 708 | 0.4 | 2,868,607 | 2,867,706 | 0.0 | 4,068.9 | 4,050.4 | -0.5 |
| Motion picture and video production companies | 66 | 78 | 18.2 | 92,740 | 117,236 | 26.4 | 1,405.2 | 1,503.0 | 7.0 |
| Animation production companies | 24 | 20 | -16.7 | 84,283 | 76,173 | -9.6 | 3,511.8 | 3,808.7 | 8.5 |
| Recording and disk production companies | 19 | 14 | -26.3 | 92,791 | 85,864 | -7.5 | 4,883.7 | 6,133.1 | 25.6 |
| Newspaper publishers | 100 | 101 | 1.0 | 1,016,402 | 1,068,527 | 5.1 | 10,164.0 | 10,579.5 | 4.1 |
| Publishers, except newspapers | 242 | 224 | -7.4 | 921,858 | 826,880 | -10.3 | 3,809.3 | 3,691.4 | -3.1 |
| Commercial art and graphic design companies | 125 | 133 | 6.4 | 432,226 | 456,168 | 5.5 | 3,457.8 | 3,429.8 | -0.8 |
| Motion picture, video and television program distribution companies | 21 | 23 | 9.5 | 114,208 | 103,430 | -9.4 | 5,438.5 | 4,497.0 | -17.3 |
| Service companies incidental to video picture information, sound information, character information production and distribution | 108 | 115 | 6.5 | 114,099 | 133,428 | 16.9 | 1,056.5 | 1,160.2 | 9.8 |
| (Special tabulation) Companies that responded to the survey for the second consecutive year | 553 | 553 | - | 2,603,822 | 2,568,946 | -1.3 | 4,708.5 | 4,645.5 | -1.3 |

Ratios of the Number of Companies by Sector (Based on Main Business)



Ratios of Sales by Sector (Based on Main Business)



Notes on Use

The Ministry of Internal Affairs and Communications and the Ministry of Economy, Trade and Industry conducted the 2014 Basic Survey on the Information and Communications Industry as of March 31, 2014, and have compiled and published the results as a 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 worker, 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 2013 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 (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 information, sound information, character information production and distribution.
- “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, in areas where it is possible to determine confidential values from the surrounding context even when the group consists of three or more companies, such values are kept confidential.
- All figures indicate the total of valid responses for each item
- As figures, ratios and percentages round off digits below unit values 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 FY2013 and sales are the performance of the entirety of FY2013.
- 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 2014, and the final report compiled based on all valid responses will be publicized in March 2015.
- 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).
- Results based on business activities in Chapter 1, Section 1 are derived by focusing on the contents of activities run by companies. In cases where companies are engaged in side businesses, figures (all but sales from the business) for the company as a whole are tabulated in the respective business types. (For example, if a responding company is engaged in both the telecommunications business and the software business, its figures are tabulated respectively in telecommunications and software in tables and diagrams.)
Accordingly, the total for 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 both 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.)
- 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 telecommunications business, private broadcasting business or cable television broadcasting business.
- In Chapter 6, data for the video picture information, sound information, character information production and distribution work are compiled without data for TV program production work or radio program production. Companies for services incidental to video picture information, sound information, character information production and distribution include news syndicate companies.
- 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 in other media, please cite the "Preliminary Report on the 2014 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 responses |
|--|--|----------------------------|-------------------------------------|---------------|---------------------------------------|
| Questionnaire (I) (Common Survey) | | 8,960 | 6,299 | 70.3% | 5,408 |
| Survey on Items for Each Business Type | (II) (Telecommunications and Broadcasting) | 1,459 | 1,031 | 70.7% | 841 |
| | (III) (Broadcast Program Production) | 881 | 542 | 61.5% | 421 |
| | (IV) (Services incidental to Internet) | 1,401 | 848 | 60.5% | 577 |
| | (V) (Information Service) | 5,784 | 3,799 | 65.7% | 3,366 |
| | (VI) (Video Picture Information, Sound Information, Character Information Production and Distribution) | 1,615 | 892 | 55.2% | 708 |

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 5,408. The total number of establishments was 24,999 and the total number of workers was 1,559,912.
- The total sales from this business were 43.1822 trillion yen (the total sales for these 5,408 companies were 70.2851 trillion yen) in FY2013. Among this, total sales from this business by companies that responded to the survey for the second consecutive year were 41.4970 trillion yen (up 2.2%).
- The operating profit was 5.1866 trillion yen, the ordinary profit was 5.5371 trillion yen, and the number of subsidiaries and affiliated companies owned was 9,181.

Fig. 1-1-1 Overall Outline

| | | Number of companies | Number of establishments | Number of workers (persons) | Number of regular workers (persons) | Sales (100 million yen) | Sales from the relevant business (100 million yen) | Operating profit (100 million yen) | Ordinary profit (100 million yen) | Number of subsidiaries and affiliated companies owned |
|--|------------------|---------------------|--------------------------|--------------------------------|--|----------------------------|---|---------------------------------------|--------------------------------------|---|
| | | | | | | | | | | |
| Overall | FY2012 | 5,496 | 24,011 | 1,502,046 | 1,492,189 | 671,076 | 425,028 | 43,575 | 45,593 | 8,425 |
| | FY2013 | 5,408 | 24,999 | 1,559,912 | 1,551,211 | 702,851 | 431,822 | 51,866 | 55,371 | 9,181 |
| | Year-on-year (%) | -1.6 | 4.1 | 3.9 | 4.0 | 4.7 | 1.6 | 19.0 | 21.4 | 9.0 |
| Telecommunications | FY2012 | 351 | 2,031 | 167,101 | 166,078 | 188,306 | 157,455 | 23,788 | 24,609 | 683 |
| | FY2013 | 382 | 2,372 | 178,747 | 178,483 | 197,748 | 160,088 | 25,396 | 26,270 | 602 |
| | Year-on-year (%) | 8.8 | 16.8 | 7.0 | 7.5 | 5.0 | 1.7 | 6.8 | 6.8 | -11.9 |
| Private broadcasting | FY2012 | 367 | 1,421 | 38,840 | 38,272 | 26,594 | 22,158 | 1,754 | 1,835 | 517 |
| | FY2013 | 404 | 1,573 | 38,184 | 37,757 | 25,903 | 21,446 | 1,793 | 1,954 | 499 |
| | Year-on-year (%) | 10.1 | 10.7 | -1.7 | -1.3 | -2.6 | -3.2 | 2.3 | 6.5 | -3.5 |
| Cablecasting | FY2012 | 231 | 564 | 20,066 | 20,034 | 10,559 | 4,932 | 1,758 | 1,165 | 102 |
| | FY2013 | 230 | 588 | 20,493 | 20,376 | 11,252 | 5,129 | 1,742 | 1,307 | 104 |
| | Year-on-year (%) | -0.4 | 4.3 | 2.1 | 1.7 | 6.6 | 4.0 | -0.9 | 12.2 | 2.0 |
| Software | FY2012 | 2,829 | 9,710 | 777,011 | 773,164 | 203,075 | 116,180 | 9,996 | 11,013 | 3,483 |
| | FY2013 | 2,774 | 9,821 | 815,374 | 812,113 | 234,448 | 135,056 | 12,033 | 14,484 | 4,130 |
| | Year-on-year (%) | -1.9 | 1.1 | 4.9 | 5.0 | 15.4 | 16.2 | 20.4 | 31.5 | 18.6 |
| Data processing and information services | FY2012 | 1,704 | 8,899 | 601,516 | 597,994 | 182,417 | 60,387 | 8,352 | 9,048 | 2,764 |
| | FY2013 | 1,577 | 8,578 | 565,983 | 563,120 | 160,164 | 44,999 | 6,216 | 7,877 | 2,441 |
| | Year-on-year (%) | -7.5 | -3.6 | -5.9 | -5.8 | -12.2 | -25.5 | -25.6 | -12.9 | -11.7 |
| Services incidental to Internet | FY2012 | 723 | 3,814 | 211,166 | 209,617 | 132,813 | 18,703 | 4,376 | 4,034 | 1,446 |
| | FY2013 | 681 | 4,120 | 216,007 | 215,136 | 145,894 | 22,030 | 10,652 | 10,144 | 1,536 |
| | Year-on-year (%) | -5.8 | 8.0 | 2.3 | 2.6 | 9.8 | 17.8 | 143.4 | 151.5 | 6.2 |
| Video picture information production and distribution | FY2012 | 474 | 1,503 | 59,247 | 58,426 | 29,351 | 8,786 | 2,119 | 1,974 | 553 |
| | FY2013 | 474 | 1,597 | 58,054 | 57,625 | 26,202 | 8,025 | 1,658 | 1,792 | 565 |
| | Year-on-year (%) | 0.0 | 6.3 | -2.0 | -1.4 | -10.7 | -8.7 | -21.7 | -9.2 | 2.2 |
| Sound information production | FY2012 | 132 | 237 | 7,256 | 7,158 | 3,477 | 1,330 | 250 | 288 | 57 |
| | FY2013 | 127 | 296 | 7,996 | 7,558 | 3,704 | 1,157 | 163 | 185 | 53 |
| | Year-on-year (%) | -3.8 | 24.9 | 10.2 | 5.6 | 6.5 | -13.0 | -34.9 | -35.8 | -7.0 |
| Newspaper publishers | FY2012 | 130 | 2,181 | 43,975 | 43,197 | 18,941 | 15,639 | 665 | 778 | 749 |
| | FY2013 | 132 | 2,156 | 43,304 | 42,602 | 18,446 | 15,259 | 696 | 835 | 756 |
| | Year-on-year (%) | 1.5 | -1.1 | -1.5 | -1.4 | -2.6 | -2.4 | 4.6 | 7.3 | 0.9 |
| Publishers, except newspapers | FY2012 | 392 | 3,187 | 88,171 | 87,569 | 35,807 | 12,070 | 1,430 | 1,745 | 927 |
| | FY2013 | 377 | 3,152 | 87,559 | 86,638 | 36,174 | 11,400 | 1,567 | 1,938 | 881 |
| | Year-on-year (%) | -3.8 | -1.1 | -0.7 | -1.1 | 1.0 | -5.5 | 9.6 | 11.1 | -5.0 |
| Commercial art and graphic design | FY2012 | 183 | 479 | 26,222 | 25,864 | 20,727 | 3,173 | 659 | 765 | 310 |
| | FY2013 | 191 | 645 | 24,459 | 24,311 | 20,191 | 3,164 | 814 | 999 | 864 |
| | Year-on-year (%) | 4.4 | 34.7 | -6.7 | -6.0 | -2.6 | -0.3 | 23.5 | 30.7 | 178.7 |
| Services incidental to video picture information, sound information, character information production and distribution | FY2012 | 164 | 500 | 18,060 | 17,943 | 5,736 | 1,198 | 333 | 360 | 154 |
| | FY2013 | 168 | 564 | 21,720 | 21,073 | 6,262 | 1,259 | 326 | 365 | 152 |
| | Year-on-year (%) | 2.4 | 12.8 | 20.3 | 17.4 | 9.2 | 5.0 | -2.2 | 1.6 | -1.3 |
| (Reproduced) TV/radio program production work | FY2012 | 399 | 706 | 30,052 | 29,563 | 13,496 | 4,150 | 1,033 | 879 | 260 |
| | FY2013 | 406 | 659 | 26,297 | 25,881 | 10,558 | 3,832 | 677 | 704 | 288 |
| | Year-on-year (%) | 1.8 | -6.7 | -12.5 | -12.5 | -21.8 | -7.7 | -34.4 | -19.9 | 10.8 |

* "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 (100 million yen) | Sales from the relevant business (100 million yen) | Operating profit (100 million yen) | Ordinary profit (100 million yen) | Number of subsidiaries and affiliated companies owned |
|---------|------------------|---------------------|--------------------------|--------------------------------|--|----------------------------|---|---------------------------------------|--------------------------------------|---|
| | | | | | | | | | | |
| Overall | FY2012 | 4,672 | 21,251 | 1,380,839 | 1,371,488 | 634,403 | 405,960 | 41,773 | 43,881 | 7,552 |
| | FY2013 | 4,672 | 21,496 | 1,392,570 | 1,384,747 | 656,344 | 414,970 | 48,306 | 51,838 | 8,343 |
| | Year-on-year (%) | - | 1.2 | 0.8 | 1.0 | 3.5 | 2.2 | 15.6 | 18.1 | 10.5 |

2. Sales

- The total sales from the information and communications business were 43.1822 trillion yen.
- Sales related to the relevant business were the largest for the telecommunications business, followed by software and data processing and information services businesses. These three businesses accounted for 78.8% of the total.

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

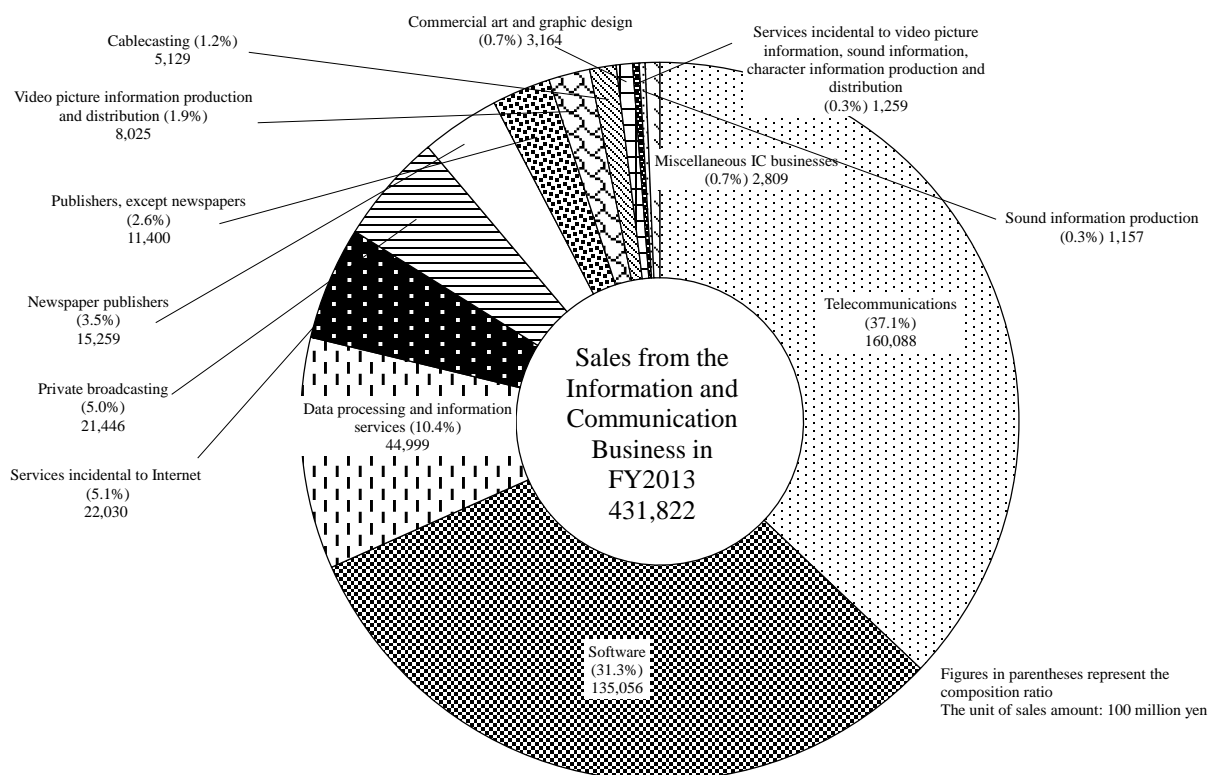


Fig. 1-1-4 Sales for the Information and Communications Business

| | | Unit: companies, 100 million yen | | | | | | | | | | | | | |
|--|----------------------------------|----------------------------------|--------------------|-----------|--|---------------------------------|----------------------|----------------------|-------------------------------|---|--------------|-----------------------------------|--|------------------------------|-----------------------------|
| | | Overall | Telecommunications | Software | Data processing and information services | Services incidental to Internet | Private broadcasting | Newspaper publishers | Publishers, except newspapers | Video picture information production and distribution | Cablecasting | Commercial art and graphic design | Services incidental to video picture information, sound information, character information production and distribution | Sound information production | Miscellaneous IC businesses |
| FY2012 | Number of companies | 5,496.0 | 351.0 | 2,829.0 | 1,704.0 | 723.0 | 367.0 | 130.0 | 392.0 | 474.0 | 231.0 | 183.0 | 132.0 | 164.0 | - |
| | Sales from the relevant business | 425,028.4 | 157,455.3 | 116,180.0 | 60,386.7 | 18,702.9 | 22,158.3 | 15,638.6 | 12,069.6 | 8,785.7 | 4,931.9 | 3,173.1 | 1,330.2 | 1,198.4 | 3,017.7 |
| | Composition ratio (%) | 100.0 | 37.0 | 27.3 | 14.2 | 4.4 | 5.2 | 3.7 | 2.8 | 2.1 | 1.2 | 0.7 | 0.3 | 0.3 | 0.7 |
| FY2013 | Number of companies | 5,408.0 | 382.0 | 2,774.0 | 1,577.0 | 681.0 | 404.0 | 132.0 | 377.0 | 474.0 | 230.0 | 191.0 | 168.0 | 127.0 | - |
| | Sales from the relevant business | 431,822.1 | 160,087.5 | 135,056.2 | 44,999.4 | 22,030.0 | 21,445.7 | 15,258.9 | 11,400.4 | 8,025.2 | 5,129.2 | 3,164.2 | 1,258.7 | 1,157.3 | 2,809.3 |
| | Composition ratio (%) | 100.0 | 37.1 | 31.3 | 10.4 | 5.1 | 5.0 | 3.5 | 2.6 | 1.9 | 1.2 | 0.7 | 0.3 | 0.3 | 0.7 |
| Change from the previous year's composition ratio (points) | | - | 0.0 | 3.9 | -3.8 | 0.7 | -0.2 | -0.1 | -0.2 | -0.2 | 0.0 | 0.0 | 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. Ratios (by capital, sales, number of workers, and engagement in side businesses)

Ratios for the number of companies that have information and communication businesses:

- 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 excluding 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 excluding 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 Ratios of Companies by Capital

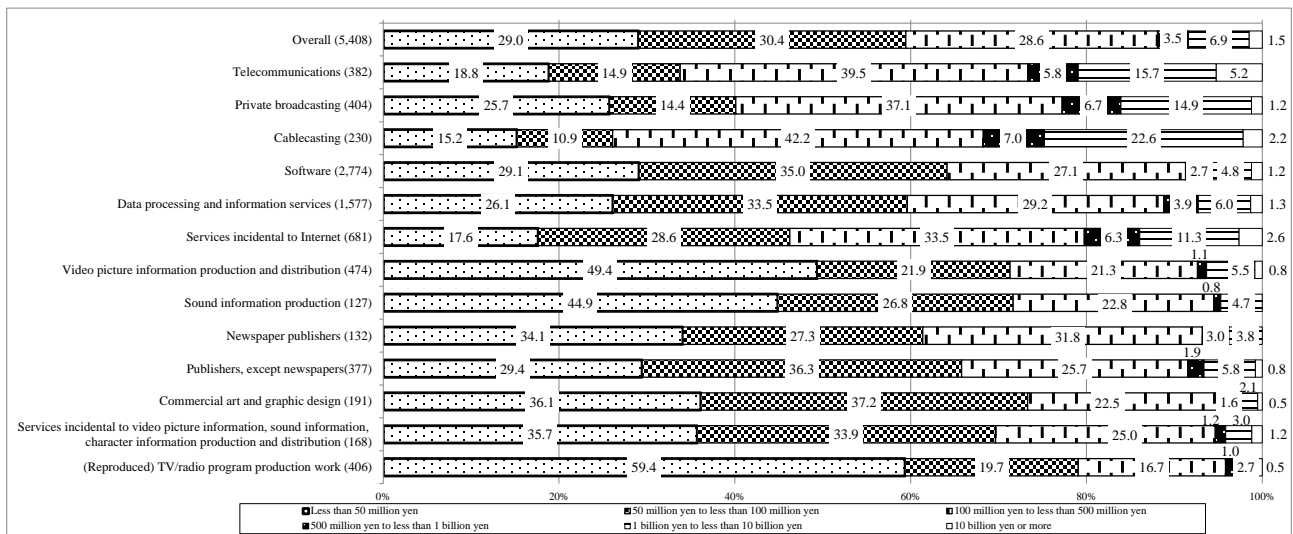


Fig. 1-1-6 Ratios of Companies by Sales

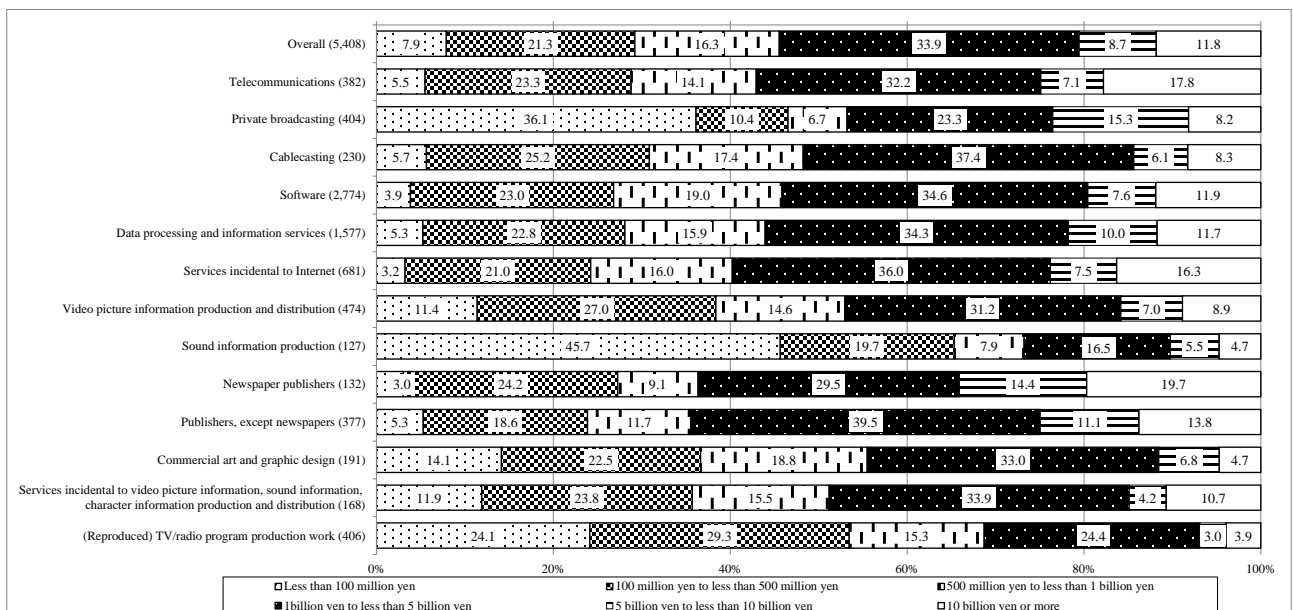


Fig. 1-1-7 Ratios of Companies by Number of Workers

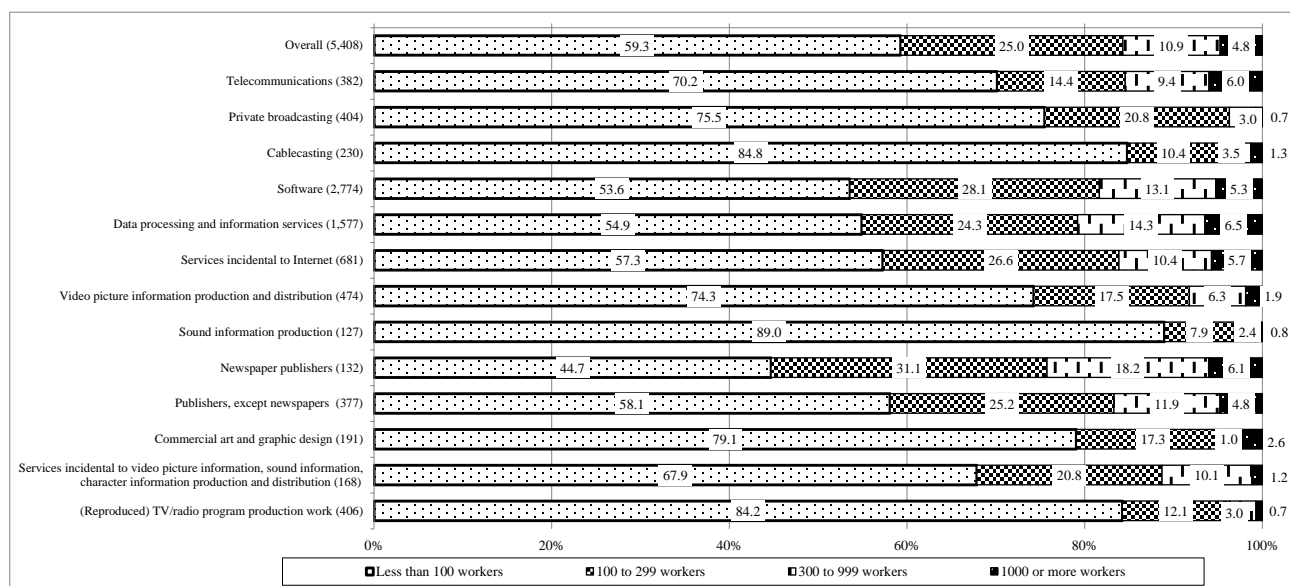
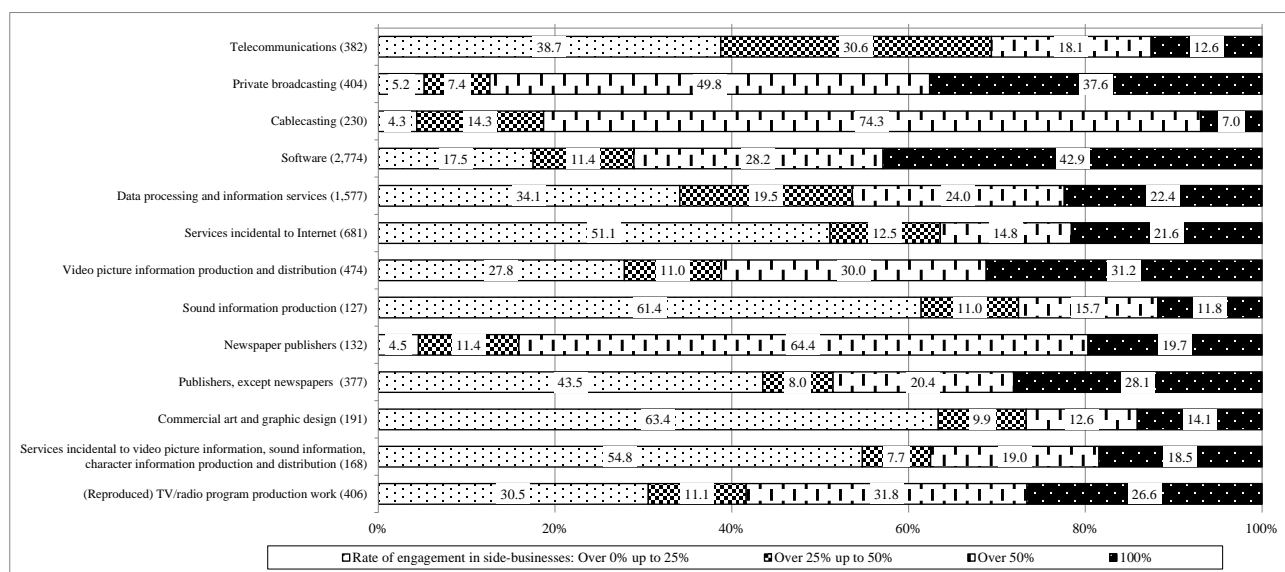


Fig. 1-1-8 Ratios of Companies by Rate of Engagement in Side-Businesses



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

4. Assets and added value

- The total average amount of assets per company was 16.17 billion yen and the average net assets per company were 7.33 billion yen. The capital adequacy ratio was 45.3%.
- The average value added per company was 4.13 billion yen (up 9.3%), the labor productivity was 14.329 million yen/person (up 3.5%), the labor share was 38.5%, and the labor equipment ratio was 20.535 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 (%) | | |
|--|---------------------|--------|---|----------|---------------------|---|----------|---------------------|--------------------------------------|--------|--|-------------------------------|--------|---|
| | FY2012 | FY2013 | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Vs. previous fiscal year (times) | FY2012 | FY2013 | Vs. previous fiscal year (points) |
| Overall | 5,496 | 5,408 | 15,038.7 | 16,166.7 | 7.5 | 6,615.1 | 7,331.3 | 10.8 | 0.81 | 0.80 | -0.01 | 44.0 | 45.3 | 1.4 |
| Telecommunications | 351 | 382 | 80,568.0 | 81,188.0 | 0.8 | 44,871.2 | 45,507.8 | 1.4 | 0.67 | 0.64 | -0.03 | 55.7 | 56.1 | 0.4 |
| Private broadcasting | 367 | 404 | 11,002.6 | 8,898.5 | -19.1 | 8,103.4 | 6,446.3 | -20.5 | 0.66 | 0.72 | 0.06 | 73.6 | 72.4 | -1.2 |
| Cablecasting | 231 | 230 | 6,614.3 | 7,118.3 | 7.6 | 2,958.9 | 3,355.7 | 13.4 | 0.69 | 0.69 | 0.00 | 44.7 | 47.1 | 2.4 |
| Software | 2,829 | 2,774 | 6,061.0 | 7,331.2 | 21.0 | 2,593.3 | 3,270.4 | 26.1 | 1.18 | 1.15 | -0.03 | 42.8 | 44.6 | 1.8 |
| Data processing and information services | 1,704 | 1,577 | 8,523.2 | 8,032.3 | -5.8 | 3,744.3 | 3,376.7 | -9.8 | 1.26 | 1.26 | 0.01 | 43.9 | 42.0 | -1.9 |
| Services incidental to Internet | 723 | 681 | 31,685.2 | 35,678.5 | 12.6 | 7,687.0 | 10,380.2 | 35.0 | 0.58 | 0.60 | 0.02 | 24.3 | 29.1 | 4.8 |
| Video picture information production and distribution | 474 | 474 | 7,789.5 | 6,127.6 | -21.3 | 5,052.7 | 3,846.2 | -23.9 | 0.79 | 0.90 | 0.11 | 64.9 | 62.8 | -2.1 |
| Sound information production | 132 | 127 | 2,217.4 | 1,934.4 | -12.8 | 1,356.6 | 1,115.4 | -17.8 | 1.19 | 1.51 | 0.32 | 61.2 | 57.7 | -3.5 |
| Newspaper publishers | 130 | 132 | 18,591.1 | 18,240.7 | -1.9 | 9,226.1 | 9,615.3 | 4.2 | 0.78 | 0.77 | -0.02 | 49.6 | 52.7 | 3.1 |
| Publishers, except newspapers | 392 | 377 | 12,699.1 | 12,415.6 | -2.2 | 8,145.4 | 7,662.8 | -5.9 | 0.72 | 0.77 | 0.05 | 64.1 | 61.7 | -2.4 |
| Commercial art and graphic design | 183 | 191 | 11,612.0 | 9,553.3 | -17.7 | 5,452.6 | 4,232.0 | -22.4 | 0.98 | 1.11 | 0.13 | 47.0 | 44.3 | -2.7 |
| Services incidental to video picture information, sound information, character information production and distribution | 164 | 168 | 3,459.7 | 3,739.6 | 8.1 | 1,936.5 | 2,255.8 | 16.5 | 1.01 | 1.00 | -0.01 | 56.0 | 60.3 | 4.3 |
| (Reproduced) TV/radio program production work | 399 | 406 | 3,540.6 | 2,749.5 | -22.3 | 2,242.7 | 1,758.0 | -21.6 | 0.96 | 0.95 | -0.01 | 63.3 | 63.9 | 0.6 |

(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) | | |
|---|---------------------|--------|---------------------------|----------|---------------------|---|---------|---------------------|-----------------|--------|---|--|---------|---------------------|
| | FY2012 | FY2013 | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Vs. previous fiscal year (points) | FY2012 | FY2013 | Year-on-year (%) |
| Overall | 5,496 | 5,408 | 3,782.0 | 4,133.0 | 9.3 | 1,383.8 | 1,432.9 | 3.5 | 40.5 | 38.5 | -2.0 | 2,047.3 | 2,053.5 | 0.3 |
| Telecommunications | 351 | 382 | 19,314.6 | 20,311.3 | 5.2 | 4,057.1 | 4,340.7 | 7.0 | 14.0 | 14.6 | 0.6 | 8,898.8 | 9,075.0 | 2.0 |
| Private broadcasting | 367 | 404 | 1,938.8 | 1,744.7 | -10.0 | 1,832.0 | 1,845.9 | 0.8 | 41.1 | 42.1 | 0.9 | 3,156.9 | 2,802.8 | -11.2 |
| Cablecasting | 231 | 230 | 2,253.0 | 2,353.2 | 4.4 | 2,593.7 | 2,641.1 | 1.8 | 18.2 | 18.7 | 0.5 | 4,681.6 | 4,726.4 | 1.0 |
| Software | 2,829 | 2,774 | 2,613.8 | 2,871.2 | 9.8 | 951.6 | 976.8 | 2.6 | 59.7 | 58.6 | -1.1 | 284.3 | 369.8 | 30.1 |
| Data processing and information services | 1,704 | 1,577 | 3,183.6 | 2,766.6 | -13.1 | 901.9 | 770.9 | -14.5 | 55.3 | 57.8 | 2.5 | 402.8 | 318.3 | -21.0 |
| Services incidental to Internet | 723 | 681 | 4,691.5 | 6,260.1 | 33.4 | 1,606.3 | 1,973.6 | 22.9 | 35.6 | 30.5 | -5.1 | 5,100.7 | 4,994.4 | -2.1 |
| Video picture information production and distribution | 474 | 474 | 1,676.2 | 1,421.6 | -15.2 | 1,341.0 | 1,160.7 | -13.4 | 44.9 | 49.4 | 4.5 | 1,703.4 | 1,164.9 | -31.6 |
| Sound information production | 132 | 127 | 630.8 | 528.8 | -16.2 | 1,147.6 | 839.9 | -26.8 | 48.0 | 48.7 | 0.7 | 534.5 | 410.8 | -23.1 |
| Newspaper publishers | 130 | 132 | 5,154.3 | 4,731.6 | -8.2 | 1,523.7 | 1,442.3 | -5.3 | 57.0 | 56.6 | -0.4 | 2,426.3 | 2,397.5 | -1.2 |
| Publishers, except newspapers | 392 | 377 | 2,584.8 | 2,668.8 | 3.2 | 1,149.2 | 1,149.1 | 0.0 | 55.1 | 55.5 | 0.5 | 1,559.6 | 1,408.8 | -9.7 |
| Commercial art and graphic design | 183 | 191 | 1,758.6 | 1,650.9 | -6.1 | 1,227.3 | 1,289.2 | 5.0 | 57.3 | 55.1 | -2.2 | 1,372.4 | 1,076.9 | -21.5 |
| Services incidental to video picture information, sound information, character information production | 164 | 168 | 1,078.2 | 1,110.5 | 3.0 | 979.1 | 858.9 | -12.3 | 55.7 | 55.9 | 0.2 | 844.3 | 734.2 | -13.0 |
| (Reproduced) TV/radio program production work | 399 | 406 | 1,016.6 | 741.5 | -27.1 | 1,349.8 | 1,144.9 | -15.2 | 47.5 | 54.2 | 6.6 | 1,313.6 | 1,022.2 | -22.2 |

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

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

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

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

5. Workers

- The total number of workers in information and communication businesses was 1,559,912 (up 3.9%), out of which full-time workers/regular staff members (hereinafter referred to as “full-time workers”) were 1,288,398 (up 2.2%). The number of part-timers was 180,634 (up 20.9%) and that of dispatched workers was 121,489 (up 2.0%).
- The average number of workers per company was 288.4, out of which 238.2 were full-time workers and 33.4 were part-timers.
- The ratio of regular workers was 83.1% (down 1.4 points) for full-time workers and 11.6% (up 1.6 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 | |
|--|---------------------|--------|-------------------|-----------|---------------------------|-----------|---|-----------|-------------|---------|-----------------------|--------|--------------------|---------|
| | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 |
| Overall | 5,496 | 5,408 | 1,502,046 | 1,559,912 | 1,492,189 | 1,551,211 | 1,260,416 | 1,288,398 | 149,389 | 180,634 | 82,384 | 82,179 | 119,136 | 121,489 |
| Year-on-year (%) | | -1.6 | | 3.9 | | 4.0 | | 2.2 | | 20.9 | | -0.2 | | 2.0 |
| Telecommunications | 351 | 382 | 167,101 | 178,747 | 166,078 | 178,483 | 129,805 | 149,592 | 13,754 | 13,101 | 22,519 | 15,790 | 14,178 | 16,555 |
| Private broadcasting | 367 | 404 | 38,840 | 38,184 | 38,272 | 37,757 | 26,818 | 27,374 | 6,795 | 6,581 | 4,659 | 3,802 | 6,338 | 6,676 |
| Cablecasting | 231 | 230 | 20,066 | 20,493 | 20,034 | 20,376 | 15,731 | 17,887 | 2,054 | 1,910 | 2,249 | 579 | 2,300 | 2,244 |
| Software | 2,829 | 2,774 | 777,011 | 815,374 | 773,164 | 812,113 | 714,713 | 751,089 | 27,342 | 32,020 | 31,109 | 29,004 | 67,553 | 70,250 |
| Data processing and information services | 1,704 | 1,577 | 601,516 | 565,983 | 597,994 | 563,120 | 471,292 | 408,196 | 100,943 | 122,578 | 25,759 | 32,346 | 56,649 | 56,609 |
| Services incidental to Internet | 723 | 681 | 211,166 | 216,007 | 209,617 | 215,136 | 183,750 | 188,885 | 15,047 | 15,147 | 10,820 | 11,104 | 21,717 | 26,008 |
| Video picture information production and distribution | 474 | 474 | 59,247 | 58,054 | 58,426 | 57,625 | 46,107 | 42,562 | 7,438 | 11,617 | 4,881 | 3,446 | 4,674 | 4,717 |
| Sound information production | 132 | 127 | 7,256 | 7,996 | 7,158 | 7,558 | 6,184 | 4,633 | 536 | 1,812 | 438 | 1,113 | 289 | 220 |
| Newspaper publishers | 130 | 132 | 43,975 | 43,304 | 43,197 | 42,602 | 38,858 | 38,010 | 3,435 | 3,668 | 904 | 924 | 1,602 | 1,598 |
| Publishers, except newspapers | 392 | 377 | 88,171 | 87,559 | 87,569 | 86,638 | 68,578 | 70,028 | 12,093 | 11,676 | 6,898 | 4,934 | 3,272 | 2,565 |
| Commercial art and graphic design | 183 | 191 | 26,222 | 24,459 | 25,864 | 24,311 | 20,180 | 18,124 | 2,256 | 2,429 | 3,428 | 3,758 | 1,110 | 1,118 |
| Services incidental to video picture information, sound information, character information production and distribution | 164 | 168 | 18,060 | 21,720 | 17,943 | 21,073 | 15,020 | 17,169 | 1,393 | 2,084 | 1,530 | 1,820 | 1,083 | 1,577 |
| (Reproduced) TV/radio program production work | 399 | 406 | 30,052 | 26,297 | 29,563 | 25,881 | 25,233 | 21,472 | 1,521 | 1,975 | 2,809 | 2,434 | 2,621 | 2,170 |

(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 | |
|------------------|---------------------|--------|-------------------|-----------|---------------------------|-----------|--|-----------|-------------|---------|-----------------------|--------|--------------------|---------|
| | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 |
| Overall | 4,672 | 4,672 | 1,380,839 | 1,392,570 | 1,371,488 | 1,384,747 | 1,156,107 | 1,169,779 | 140,556 | 144,162 | 74,825 | 70,806 | 111,070 | 111,168 |
| Year-on-year (%) | - | - | - | 0.8 | - | 1.0 | - | 1.2 | - | 2.6 | - | -5.4 | - | 0.1 |

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

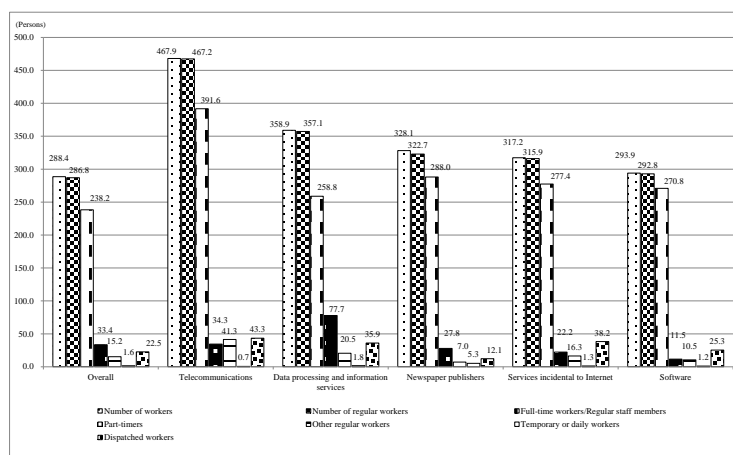
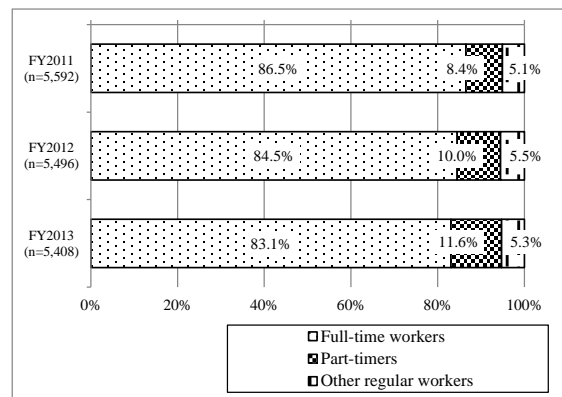


Fig. 1-1-14 Ratio of Regular Workers



6. Ownership of subsidiaries and affiliated companies

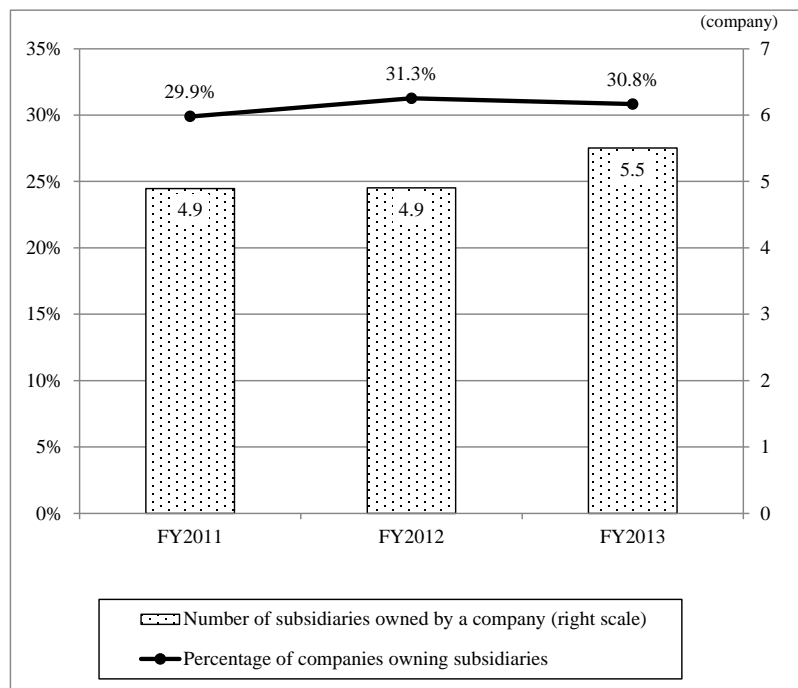
- The number of information and communication companies that own subsidiaries* was 1,667, which own 9,181 subsidiaries.
- Commercial art and graphic design owned the largest average number of subsidiaries per company (20.1), followed by the newspaper publishers (10.6) and telecommunications (6.4).

(*) Subsidiaries include affiliated companies.

Fig. 1-1-15 Ownership of subsidiaries

| | | (Unit: 1 company) | | | | | | | |
|---------|--|---------------------|---|---|------------------------|--|--|-------------------------------------|---|
| | | Number of companies | Number of companies owning subsidiaries | Percentage of companies that own subsidiaries (%) | Number of subsidiaries | Number of subsidiaries owned per company | Overseas | | |
| | | | | | | | Number of companies that own overseas subsidiaries (A) | Number of overseas subsidiaries (B) | Number of overseas subsidiaries owned per company (B/A) |
| Overall | FY2012 | 5,496 | 1,718 | 31.3 | 8,425 | 4.9 | 526 | 2,307 | 4.4 |
| | FY2013 | 5,408 | 1,667 | 30.8 | 9,181 | 5.5 | 489 | 2,805 | 5.7 |
| | Difference from previous year (pt/company) | -1.6% | -3.0% | -0.4pt | 9.0% | 0.6 | -7.0% | 21.6% | 1.4 |
| | Telecommunications | 382 | 94 | 24.6 | 602 | 6.4 | 19 | 62 | 3.3 |
| | Private broadcasting | 404 | 144 | 35.6 | 499 | 3.5 | 5 | 12 | 2.4 |
| | Cablecasting | 230 | 44 | 19.1 | 104 | 2.4 | - | - | - |
| | Software | 2,774 | 849 | 30.6 | 4,130 | 4.9 | 307 | 1,543 | 5.0 |
| | Data processing and information services | 1,577 | 430 | 27.3 | 2,441 | 5.7 | 125 | 619 | 5.0 |
| | Services incidental to Internet | 681 | 269 | 39.5 | 1,536 | 5.7 | 94 | 335 | 3.6 |
| | Video picture information production and distribution | 474 | 138 | 29.1 | 565 | 4.1 | 25 | 41 | 1.6 |
| | Sound information production | 127 | 27 | 21.3 | 53 | 2.0 | 3 | 3 | 1.0 |
| | Newspaper publishers | 132 | 71 | 53.8 | 756 | 10.6 | 6 | 24 | 4.0 |
| | Publishers, except newspapers | 377 | 156 | 41.4 | 881 | 5.6 | 29 | 73 | 2.5 |
| | Commercial art and graphic design | 191 | 43 | 22.5 | 864 | 20.1 | 9 | 668 | 74.2 |
| | Services incidental to video picture information, sound information, character information production and distribution | 168 | 43 | 25.6 | 152 | 3.5 | 9 | 16 | 1.8 |
| | (Reproduced) TV/radio program production work | 406 | 88 | 21.7 | 288 | 3.3 | 9 | 13 | 1.4 |

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 which earn more sales from the IC business than from any other) was 4,632 (down 1.9%) in FY2013. The number of establishments was 16,668 (up 2.6%) and the number of regular workers was 1,070,557 (up 1.4%).
- The total sales by IC companies were 44.2390 trillion yen (up 1.6%), out of which 40.6264 trillion yen (up 1.9%) were the sales from the information and communications business. The operating profit was 4.2149 trillion yen (up 7.4%) and the ordinary profit was 4.4232 trillion yen (up 7.2%).

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 (100 million yen) | Sales from the IC business (100 million yen) | Operating profit (100 million yen) | Ordinary profit (100 million yen) |
|--|------------------|---------------------|--------------------------|-----------------------------|-------------------------------------|-------------------------|--|------------------------------------|-----------------------------------|
| IC companies | FY2012 | 4,724 | 16,253 | 1,060,444 | 1,055,802 | 435,455 | 398,705 | 39,236 | 41,270 |
| | FY2013 | 4,632 | 16,668 | 1,075,588 | 1,070,557 | 442,390 | 406,264 | 42,149 | 44,232 |
| | Year-on-year (%) | - 1.9 | 2.6 | 1.4 | 1.4 | 1.6 | 1.9 | 7.4 | 7.2 |
| Telecommunications | FY2012 | 118 | 839 | 86,834 | 86,141 | 166,029 | 157,236 | 21,342 | 22,776 |
| | FY2013 | 132 | 1,094 | 89,880 | 89,681 | 171,414 | 160,359 | 22,967 | 24,078 |
| | Year-on-year (%) | 11.9 | 30.4 | 3.5 | 4.1 | 3.2 | 2.0 | 7.6 | 5.7 |
| Private broadcasting | FY2012 | 337 | 960 | 28,616 | 28,089 | 24,691 | 23,937 | 1,537 | 1,571 |
| | FY2013 | 372 | 1,042 | 28,239 | 27,864 | 22,924 | 21,900 | 1,412 | 1,511 |
| | Year-on-year (%) | 10.4 | 8.5 | - 1.3 | - 0.8 | - 7.2 | - 8.5 | - 8.1 | - 3.8 |
| Cablecasting | FY2012 | 203 | 487 | 13,612 | 13,580 | 5,781 | 5,714 | 1,093 | 530 |
| | FY2013 | 198 | 505 | 14,893 | 14,832 | 7,035 | 6,940 | 1,163 | 807 |
| | Year-on-year (%) | - 2.5 | 3.7 | 9.4 | 9.2 | 21.7 | 21.5 | 6.4 | 52.2 |
| Software | FY2012 | 2,078 | 5,842 | 513,037 | 512,243 | 122,662 | 107,033 | 7,210 | 7,736 |
| | FY2013 | 2,073 | 5,860 | 543,354 | 542,572 | 141,183 | 125,246 | 8,514 | 9,164 |
| | Year-on-year (%) | - 0.2 | 0.3 | 5.9 | 5.9 | 15.1 | 17.0 | 18.1 | 18.5 |
| Data processing and information services | FY2012 | 885 | 3,746 | 272,724 | 271,633 | 58,819 | 51,948 | 3,865 | 4,042 |
| | FY2013 | 808 | 3,894 | 253,033 | 251,005 | 43,052 | 39,090 | 3,020 | 3,005 |
| | Year-on-year (%) | - 8.7 | 4.0 | - 7.2 | - 7.6 | - 26.8 | - 24.8 | - 21.9 | - 25.7 |
| Services incidental to Internet | FY2012 | 290 | 657 | 41,892 | 41,808 | 14,608 | 13,708 | 2,384 | 2,455 |
| | FY2013 | 260 | 693 | 46,124 | 45,974 | 16,895 | 16,290 | 3,364 | 3,551 |
| | Year-on-year (%) | - 10.3 | 5.5 | 10.1 | 10.0 | 15.7 | 18.8 | 41.1 | 44.6 |
| Video picture information production and distribution | FY2012 | 306 | 554 | 24,341 | 23,992 | 8,924 | 7,920 | 634 | 738 |
| | FY2013 | 309 | 503 | 22,544 | 22,318 | 8,168 | 7,278 | 591 | 682 |
| | Year-on-year (%) | 1.0 | - 9.2 | - 7.4 | - 7.0 | - 8.5 | - 8.1 | - 6.8 | - 7.5 |
| TV program production | FY2012 | 214 | 349 | 16,092 | 15,782 | 4,735 | 4,456 | 216 | 260 |
| | FY2013 | 225 | 342 | 15,654 | 15,451 | 4,226 | 4,036 | 203 | 245 |
| | Year-on-year (%) | 5.1 | - 2.0 | - 2.7 | - 2.1 | - 10.8 | - 9.4 | - 5.9 | - 5.7 |
| Sound information production | FY2012 | 53 | 72 | 1,680 | 1,677 | 1,840 | 1,608 | 143 | 135 |
| | FY2013 | 41 | 55 | 1,066 | 1,065 | 1,183 | 1,022 | 98 | 101 |
| | Year-on-year (%) | - 22.6 | - 23.6 | - 36.5 | - 36.5 | - 35.7 | - 36.5 | - 31.7 | - 25.6 |
| Radio program production | FY2012 | 41 | 47 | 585 | 582 | 77 | 70 | 2 | 2 |
| | FY2013 | 32 | 34 | 359 | 358 | 34 | 31 | 1 | 1 |
| | Year-on-year (%) | - 22.0 | - 27.7 | - 38.6 | - 38.5 | - 56.0 | - 55.0 | - 36.0 | - 43.0 |
| Newspaper publishers | FY2012 | 109 | 2,029 | 41,039 | 40,273 | 17,944 | 16,095 | 611 | 710 |
| | FY2013 | 118 | 2,020 | 40,620 | 39,923 | 17,595 | 15,730 | 663 | 786 |
| | Year-on-year (%) | 8.3 | - 0.4 | - 1.0 | - 0.9 | - 1.9 | - 2.3 | 8.6 | 10.7 |
| Publishers, except newspapers | FY2012 | 213 | 719 | 28,209 | 27,942 | 12,151 | 11,686 | 348 | 496 |
| | FY2013 | 193 | 632 | 25,867 | 25,754 | 10,926 | 10,609 | 290 | 470 |
| | Year-on-year (%) | - 9.4 | - 12.1 | - 8.3 | - 7.8 | - 10.1 | - 9.2 | - 16.6 | - 5.3 |
| Commercial art and graphic design | FY2012 | 63 | 114 | 3,270 | 3,253 | 962 | 921 | 45 | 48 |
| | FY2013 | 58 | 127 | 2,787 | 2,757 | 794 | 780 | 40 | 41 |
| | Year-on-year (%) | - 7.9 | 11.4 | - 14.8 | - 15.2 | - 17.5 | - 15.3 | - 10.9 | - 13.0 |
| Services incidental to video picture information, sound information, character information production and distribution | FY2012 | 69 | 234 | 5,190 | 5,171 | 1,043 | 898 | 22 | 33 |
| | FY2013 | 70 | 243 | 7,181 | 6,812 | 1,221 | 1,022 | 24 | 36 |
| | Year-on-year (%) | 1.4 | 3.8 | 38.4 | 31.7 | 17.0 | 13.8 | 9.9 | 7.4 |

(Note 1) “Sales from the IC business” refers to sales related to the information and communication business.

(Note 2) Year-on-year changes in sales, operating profits, and ordinary profits are calculated in 1 million yen units.

- The number of establishments per IC company was 3.6 (up 0.2 points), and the average number of regular workers was 231 (up 3.6%).
- The average sales per company were 9.55 billion yen (up 3.6%), out of which 8.77 billion yen (up 3.9%) were the sales from the information and communications business. The operating profit was 910 million yen (up 9.5%) and the ordinary profit was 950 million yen (up 9.3%).

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

| | | Number of establishments | Number of workers (persons) | Number of regular workers (persons) | Sales (million yen) | Sales from the IC business (million yen) | Operating profit (million yen) | Ordinary profit (million yen) |
|--|------------------|--------------------------|-----------------------------|-------------------------------------|---------------------|--|--------------------------------|-------------------------------|
| IC companies | FY2012 | 3.4 | 224 | 223 | 9,217.9 | 8,440.0 | 830.6 | 873.6 |
| | FY2013 | 3.6 | 232 | 231 | 9,550.7 | 8,770.8 | 909.9 | 954.9 |
| | Year-on-year (%) | 0.2 | 3.6 | 3.6 | 3.6 | 3.9 | 9.5 | 9.3 |
| Telecommunications | FY2012 | 7.1 | 736 | 730 | 140,702.2 | 133,251.2 | 18,086.8 | 19,301.3 |
| | FY2013 | 8.3 | 681 | 679 | 129,859.4 | 121,484.4 | 17,399.3 | 18,240.6 |
| | Year-on-year (%) | 1.2 | -7.5 | -7.0 | -7.7 | -8.8 | -3.8 | -5.5 |
| Private broadcasting | FY2012 | 2.8 | 85 | 83 | 7,326.8 | 7,102.9 | 456.2 | 466.2 |
| | FY2013 | 2.8 | 76 | 75 | 6,162.4 | 5,887.0 | 379.7 | 406.2 |
| | Year-on-year (%) | 0.0 | -10.6 | -9.6 | -15.9 | -17.1 | -16.8 | -12.9 |
| Cablecasting | FY2012 | 2.4 | 67 | 67 | 2,847.6 | 2,814.7 | 538.4 | 261.0 |
| | FY2013 | 2.6 | 75 | 75 | 3,552.9 | 3,504.8 | 587.5 | 407.4 |
| | Year-on-year (%) | 0.2 | 11.9 | 11.9 | 24.8 | 24.5 | 9.1 | 56.1 |
| Software | FY2012 | 2.8 | 247 | 247 | 5,902.9 | 5,150.7 | 347.0 | 372.3 |
| | FY2013 | 2.8 | 262 | 262 | 6,810.6 | 6,041.8 | 410.7 | 442.1 |
| | Year-on-year (%) | 0.0 | 6.1 | 6.1 | 15.4 | 17.3 | 18.4 | 18.7 |
| Data processing and information services | FY2012 | 4.2 | 308 | 307 | 6,646.3 | 5,869.8 | 436.8 | 456.8 |
| | FY2013 | 4.8 | 313 | 311 | 5,328.2 | 4,837.8 | 373.8 | 371.9 |
| | Year-on-year (%) | 0.6 | 1.6 | 1.3 | -19.8 | -17.6 | -14.4 | -18.6 |
| Services incidental to Internet | FY2012 | 2.3 | 144 | 144 | 5,037.3 | 4,726.8 | 822.2 | 846.5 |
| | FY2013 | 2.7 | 177 | 177 | 6,498.1 | 6,265.3 | 1,293.9 | 1,365.6 |
| | Year-on-year (%) | 0.4 | 22.9 | 22.9 | 29.0 | 32.5 | 57.4 | 61.3 |
| Video picture information production and distribution | FY2012 | 1.8 | 80 | 78 | 2,916.3 | 2,588.4 | 207.3 | 241.1 |
| | FY2013 | 1.6 | 73 | 72 | 2,643.5 | 2,355.2 | 191.4 | 220.8 |
| | Year-on-year (%) | -0.2 | -8.8 | -7.7 | -9.4 | -9.0 | -7.7 | -8.4 |
| TV program production | FY2012 | 1.6 | 75 | 74 | 2,212.8 | 2,082.4 | 100.8 | 121.5 |
| | FY2013 | 1.5 | 70 | 69 | 1,878.0 | 1,793.9 | 90.2 | 109.0 |
| | Year-on-year (%) | -0.1 | -6.7 | -6.8 | -15.1 | -13.9 | -10.5 | -10.3 |
| Sound information production | FY2012 | 1.4 | 32 | 32 | 3,472.0 | 3,034.8 | 269.9 | 255.4 |
| | FY2013 | 1.3 | 26 | 26 | 2,884.4 | 2,492.8 | 238.4 | 245.5 |
| | Year-on-year (%) | -0.1 | -18.8 | -18.8 | -16.9 | -17.9 | -11.7 | -3.9 |
| Radio program production | FY2012 | 1.1 | 14 | 14 | 187.1 | 170.1 | 3.9 | 4.4 |
| | FY2013 | 1.1 | 11 | 11 | 105.5 | 98.1 | 3.2 | 3.2 |
| | Year-on-year (%) | 0.0 | -21.4 | -21.4 | -43.6 | -42.3 | -17.9 | -27.3 |
| Newspaper publishers | FY2012 | 18.6 | 377 | 369 | 16,462.4 | 14,766.3 | 560.3 | 651.4 |
| | FY2013 | 17.1 | 344 | 338 | 14,911.4 | 13,330.3 | 562.3 | 666.4 |
| | Year-on-year (%) | -1.5 | -8.8 | -8.4 | -9.4 | -9.7 | 0.4 | 2.3 |
| Publishers, except newspapers | FY2012 | 3.4 | 132 | 131 | 5,704.9 | 5,486.5 | 163.3 | 233.1 |
| | FY2013 | 3.3 | 134 | 133 | 5,661.1 | 5,496.8 | 150.3 | 243.6 |
| | Year-on-year (%) | -0.1 | 1.5 | 1.5 | -0.8 | 0.2 | -8.0 | 4.5 |
| Commercial art and graphic design | FY2012 | 1.8 | 52 | 52 | 1,526.8 | 1,462.6 | 71.2 | 75.5 |
| | FY2013 | 2.2 | 48 | 48 | 1,368.3 | 1,345.5 | 68.9 | 71.3 |
| | Year-on-year (%) | 0.4 | -7.7 | -7.7 | -10.4 | -8.0 | -3.2 | -5.6 |
| Services incidental to video picture information, sound information, character information production & distribution | FY2012 | 3.4 | 75 | 75 | 1,512.0 | 1,301.3 | 32.2 | 48.4 |
| | FY2013 | 3.5 | 103 | 97 | 1,744.3 | 1,459.9 | 34.9 | 51.3 |
| | Year-on-year (%) | 0.1 | 37.3 | 29.3 | 15.4 | 12.2 | 8.4 | 6.0 |

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

2. Number of companies

- Examining the number of IC companies in terms of the ratios by capital, companies with “Less than 100 million yen” accounted for 59.9% (up 0.3 points).
- By sales, companies with “Less than 1 billion yen” accounted for 49.0% (down 0.4 points).
- By number of regular workers, companies with “Less than 100 workers” accounted for 62.4% (down 0.4 points).

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

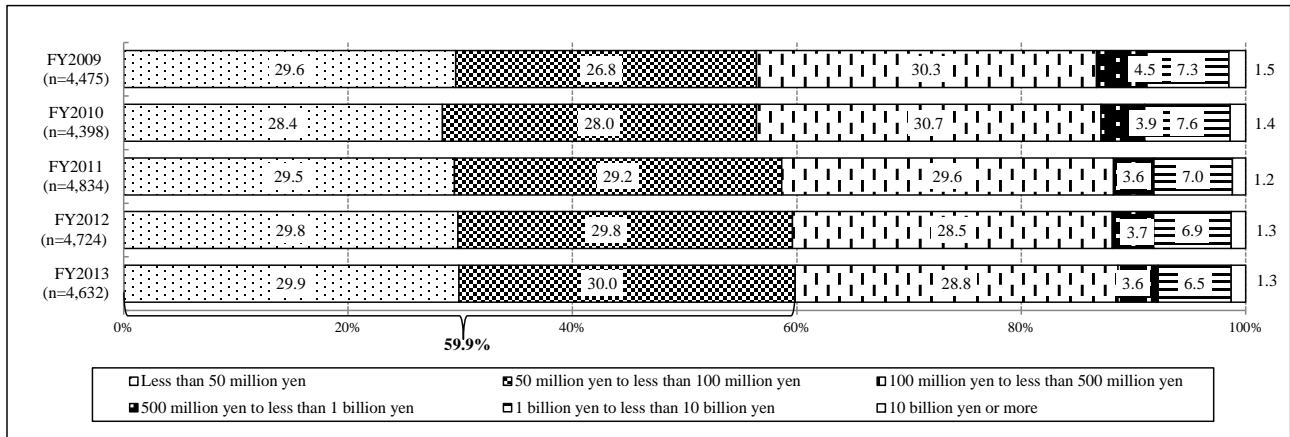


Fig. 1-2-4 Ratios of IC Companies by Sales

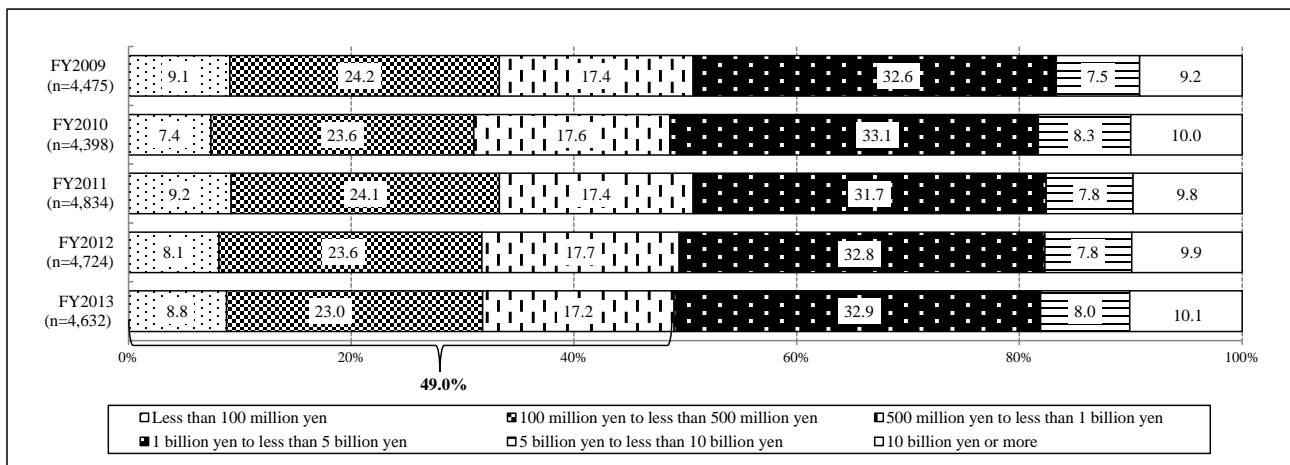
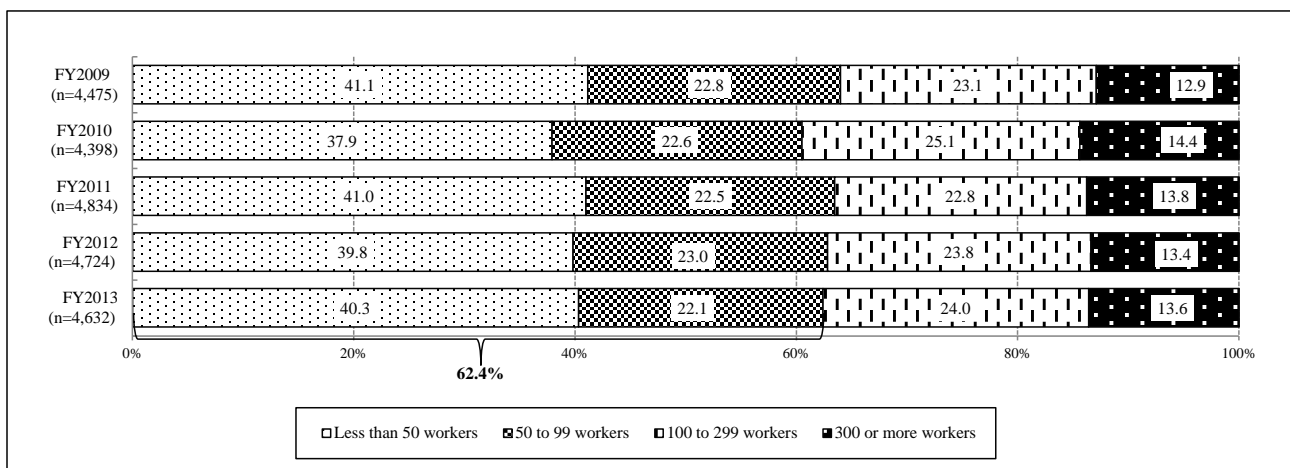


Fig. 1-2-5 Ratios of IC Companies by Number of Regular Workers

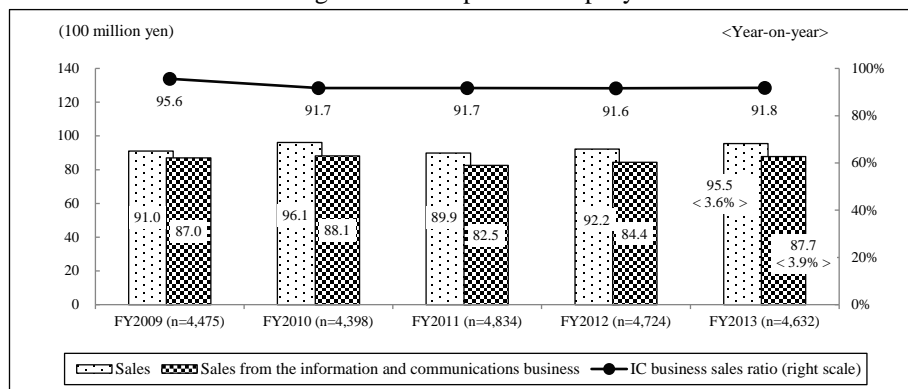


3. Sales and profits

- The average sales per IC company were 9.55 billion yen (up 3.6%^(Note)). The average sales from the information and communications business were 8.77 billion yen (up 3.9%), making up 91.8% of sales (up 0.2 points).
- The average operating profit per IC company was 910 million yen (up 9.5%^(Note)), and ordinary profit per IC company was 950 million yen (up 9.3%). Current average net income per IC company was 480 million yen (up 2.1%), showing an upward trend.
- The operating margin was 9.5% (up 0.5 points), the operating profit on sales was 10.0% (up 0.5 points), and the income margin was 5.0% (down 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 per IC Company

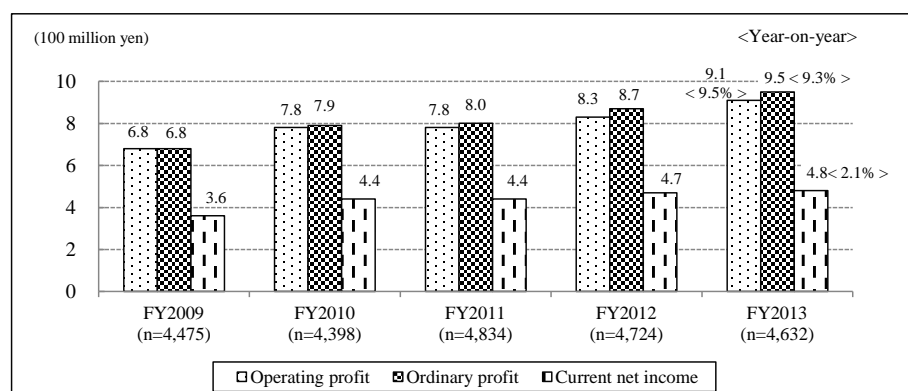
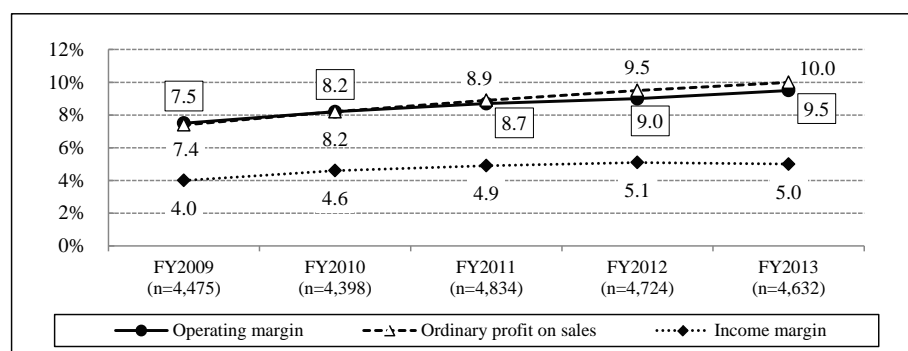


Fig. 1-2-8 Profit Margin of IC Companies



(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)

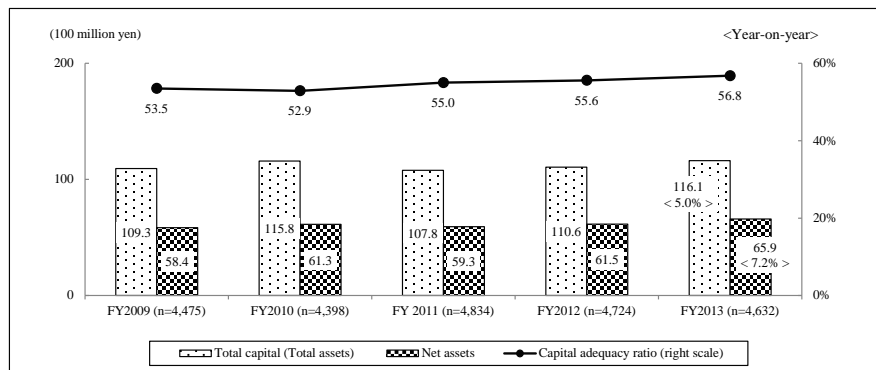
The operating margin, ordinary profit on sales, and income margin are calculated in 1 million yen units.

4. Assets and added value

- The average total value of assets per IC company was 11.61 billion yen (up 5.0%^(Note)) and net assets per IC company were 6.59 billion yen (up 7.2%). The capital adequacy ratio was 56.8% (up 1.2 points).
- The added value per IC company was 3.61 billion yen (up 6.3%^(Note)). The value added ratio was 37.8% (up 1.0 point) and labor productivity was 15.608 million yen/person (up 2.8%). The labor equipment ratio was 16.853 million yen/person (down 0.4%).

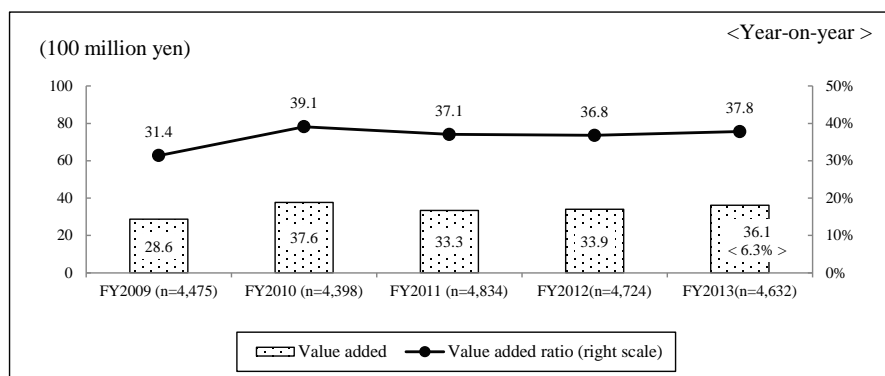
(Note) Calculated in 1 million yen units

Fig. 1-2-9 Assets per IC Company



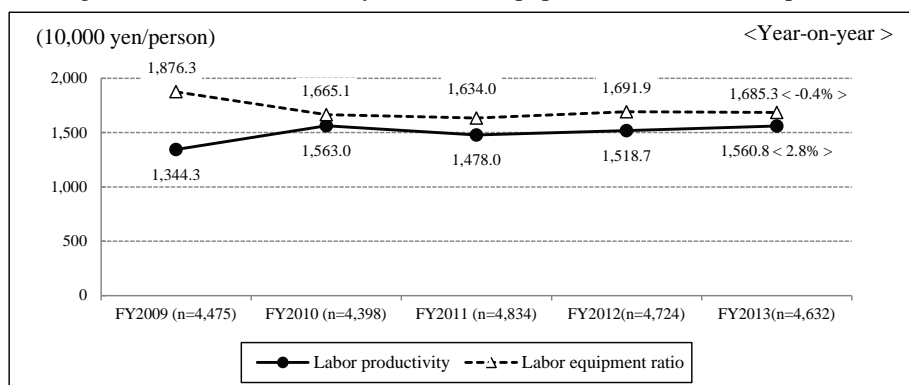
(Note) Capital adequacy ratio = Net assets / Total capital (total assets) × 100. Index to show the percentage of own capital among the total capital and thereby indicate financial security. Calculated in 1 million yen units.

Fig. 1-2-10 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. 1-2-11 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 1,070,557 (up 1.4%), out of which 931,156 (up 0.8%) were full-time workers. The number of part-timers was 86,329 (up 20.1%) and the number of dispatched workers was 103,366 (up 2.2%).
- The average number of regular workers per IC company was 231.1 (up 7.6 workers), out of which 201.0 were full-time workers (up 5.4 workers). The average number of part-timers was 18.6 (up 3.4 workers) and the average number of dispatched workers was 22.3 (up 0.9 workers).
- Looking at the ratio of regular workers, full-time workers represented 87.0% (down 0.5 points), and the ratio was on a yearly downward trend. Part-timers represented 8.1% (up 1.3 points).

Fig. 1-2-12 Workers at IC Companies

| | Number of workers (persons) | | | Number of Workers per IC Company (persons) | |
|---|-----------------------------|---------------------|---------------------|--|--------|
| | FY2012 (n=4,724) | FY2013 (n=4,632) | Year-on-year (%) | FY2012 | FY2013 |
| Workers | 1,060,444 | 1,075,588 | 1.4 | 224.5 | 232.2 |
| Regular workers | 1,055,802 | 1,070,557 | 1.4 | 223.5 | 231.1 |
| Full-time workers/ Regular staff members | 923,870 | 931,156 | 0.8 | 195.6 | 201.0 |
| Part-timers | 71,863 | 86,329 | 20.1 | 15.2 | 18.6 |
| Other regular workers | 60,069 | 53,072 | -11.6 | 12.7 | 11.5 |
| Temporary or daily workers | 4,642 | 5,031 | 8.4 | 1.0 | 1.1 |
| Dispatched workers | 101,106 | 103,366 | 2.2 | 21.4 | 22.3 |

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

Fig. 1-2-13 Number of Workers per IC Company

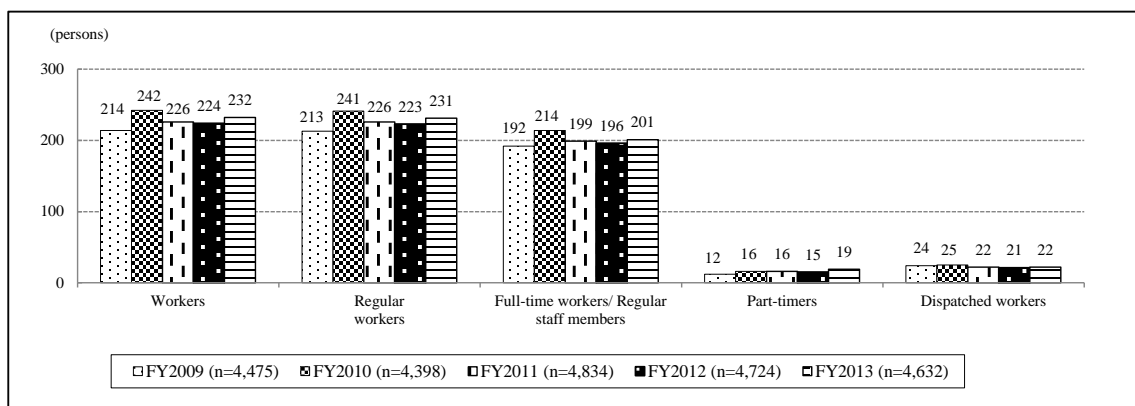
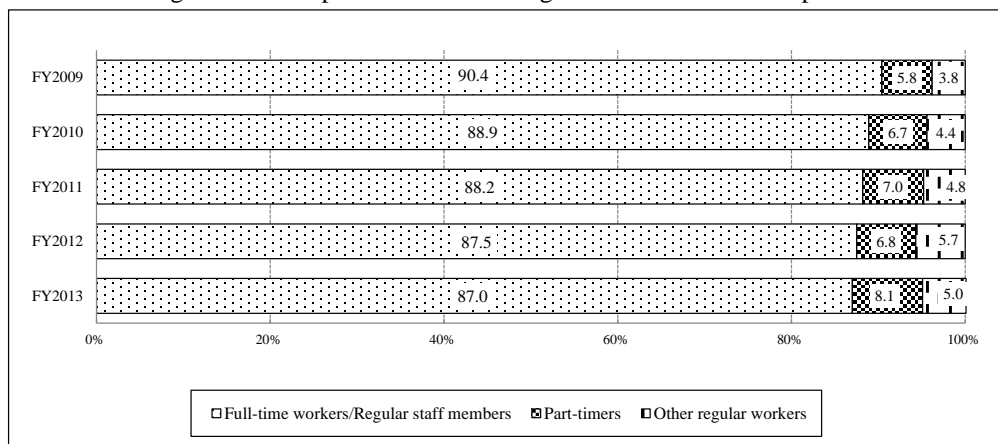


Fig. 1-2-14 Composition Ratios of Regular Workers at IC Companies



6. Subsidiaries and affiliated companies

- Among the 4,632 information and communication companies, the number of those which own subsidiaries ^(Note) was 1,361 (down 3.2%), of which 1,208 companies (down 2.0%) own domestic subsidiaries and 386 (down 7.2%) own overseas subsidiaries.
- The number of subsidiaries was 5,803 (up 0.1%), of which, domestic subsidiaries accounted for 4,410 (up 2.0%) and the overseas subsidiaries 1,393 (down 5.4%).

(Note) Subsidiaries include affiliated companies.

Fig. 1-2-15 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 (Note) | |
|------------------------------|---|---------------------|------------------|--|--------|------------------------|--------|------------------|--|--------|
| | FY2012 (n=4,724) | FY2013 (n=4,632) | Year-on-year (%) | FY2012 | FY2013 | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 |
| IC companies | 1,406 | 1,361 | -3.2 | 29.8 | 29.4 | 5,795 | 5,803 | 0.1 | 4.1 | 4.3 |
| Owning domestic subsidiaries | 1,233 | 1,208 | -2.0 | 26.1 | 26.1 | 4,322 | 4,410 | 2.0 | 3.5 | 3.7 |
| Owning overseas subsidiaries | 416 | 386 | -7.2 | 8.8 | 8.3 | 1,473 | 1,393 | -5.4 | 3.5 | 3.6 |

(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. 1-2-16 Number of IC companies that own subsidiaries

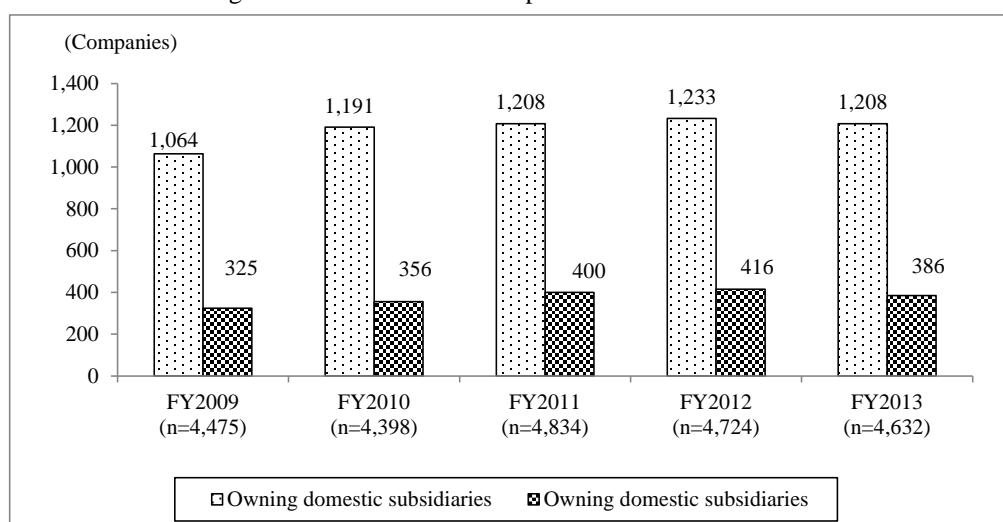
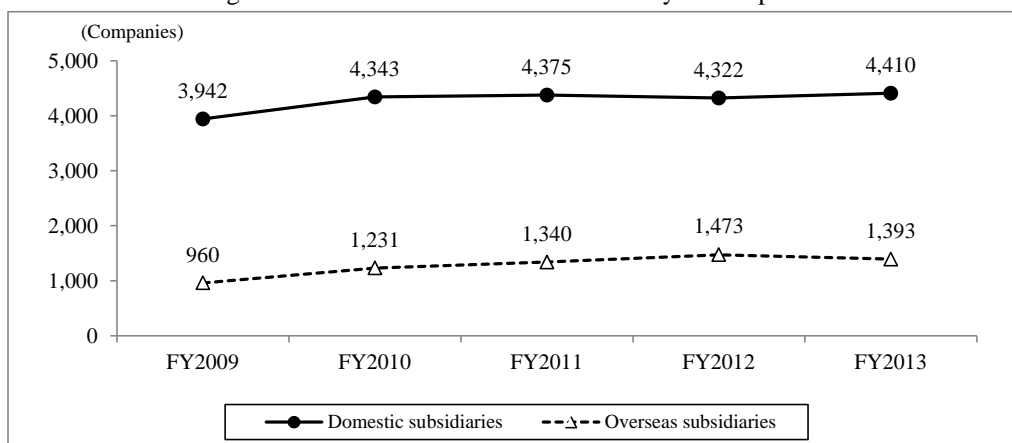


Fig. 1-2-17 Number of subsidiaries owned by IC companies



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 841 companies (1,072 companies on a business basis).

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

- By capital, in the entire 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 20.5%, followed by those with capital of “less than 50 million yen,” accounting for 20.0%, and those with capital of “100 million yen to less than 300 million yen” accounting for 18.4%. 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 (20.2% and 26.8%), and those with capital of “less than 50 million yen” accounted for the majority in private broadcasting (24.3%).
- In terms of total sales in the 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 (30.2%, 33.7% and 27.7%, 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 (39.4% and 57.6%, respectively), and those with sales of “less than 100 million yen” accounted for the majority in private broadcasting (42.5%).
- By the number of workers, business operators with “One to 29 workers” accounted for the majority, or 62.9%, followed by those with “30 to 99 workers,” accounting for 19.6%. The same trend is also evident when examining the data by business type.

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

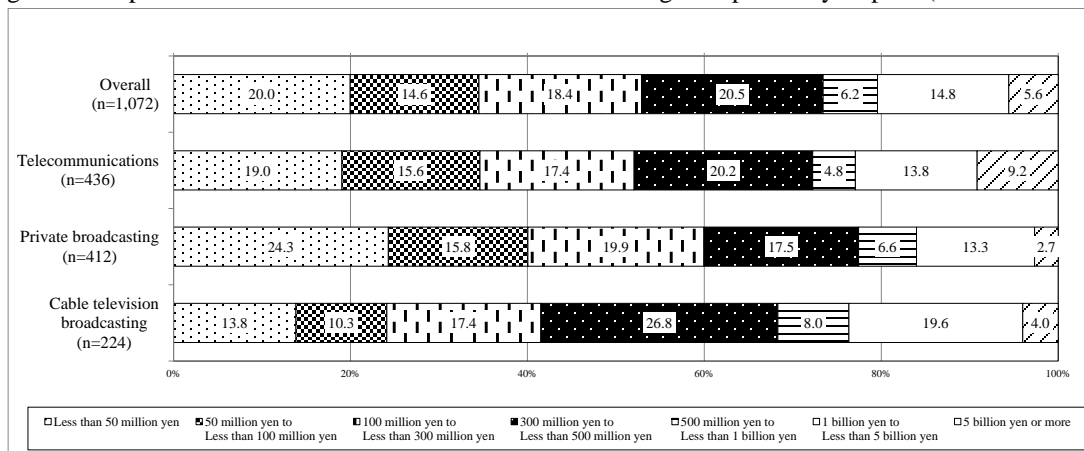


Fig. 2-2 Composition of Telecommunications and Broadcasting Companies by Sales (Business Basis)

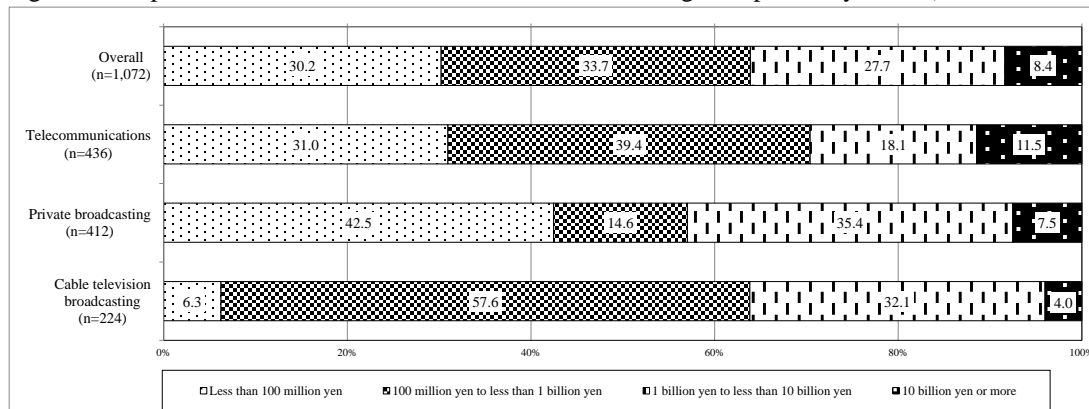
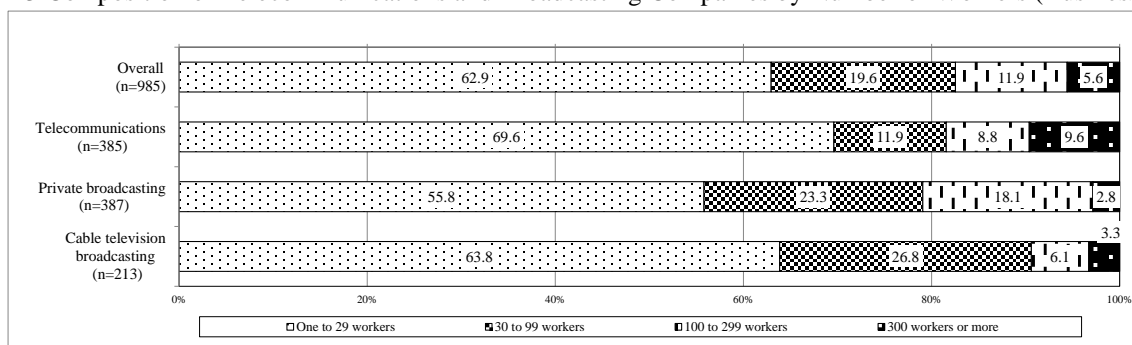


Fig. 2-3 Composition of Telecommunications and Broadcasting Companies by Number of Workers (Business Basis)



2. Sales

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

- The total sales of the telecommunications and broadcasting business in FY2013 (on a business basis) were 16.8598 trillion yen.
- The total sales of companies that responded to the survey for the second consecutive year were 15.9218 trillion yen (up 1.3%).
- Examining engagement in side businesses, there are many companies that engaged in the telecommunications and the cable television broadcasting concurrently.

Fig. 2-4 Changes in Sales by Business Type

(Unit: companies, 100 million yen, %)

| Classification | FY2011 | | FY2012 | | FY2013 | |
|-------------------------------|---------------------|---------------------------|---------------------|---------------------------|---------------------|---------------------------|
| | Number of companies | Sales (Composition ratio) | Number of companies | Sales (Composition ratio) | Number of companies | Sales (Composition ratio) |
| Overall | 970 | 163,332 (100.0%) | 1,046 | 159,890 (100.0%) | 1,073 | 168,598 (100.0%) |
| Telecommunications | 373 | 132,713 (81.3%) | 418 | 129,551 (81.0%) | 436 | 135,874 (80.6%) |
| Broadcasting | 597 | 30,619 (18.7%) | 628 | 30,339 (19.0%) | 637 | 32,724 (19.4%) |
| Private broadcasting | 371 | 19,092 (11.7%) | 406 | 19,351 (12.1%) | 412 | 21,592 (12.8%) |
| Cable television broadcasting | 225 | 4,530 (2.8%) | 221 | 4,384 (2.7%) | 224 | 4,562 (2.7%) |
| NHK | 1 | 6,997 (4.3%) | 1 | 6,604 (4.1%) | 1 | 6,570 (3.9%) |

*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 | FY2012 | | FY2013 | | Year-on-year (%) |
|-------------------------------|---------------------|---------------------------|---------------------|---------------------------|------------------|
| | Number of companies | Sales (Composition ratio) | Number of companies | Sales (Composition ratio) | |
| Overall | 866 | 157,161 (100.0%) | 866 | 159,218 (100.0%) | 1.3 |
| Telecommunications | 340 | 128,115 (81.5%) | 340 | 128,748 (80.9%) | 0.5 |
| Broadcasting | 526 | 29,047 (18.5%) | 526 | 30,470 (19.1%) | 4.9 |
| Private broadcasting | 337 | 18,606 (11.8%) | 337 | 19,731 (12.4%) | 6.0 |
| Cable television broadcasting | 188 | 3,837 (2.4%) | 188 | 4,169 (2.6%) | 8.6 |
| NHK | 1 | 6,604 (4.2%) | 1 | 6,570 (4.1%) | - 0.5 |

*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) | | | (Relevant business) | | | (Relevant business) | | |
| Telecommunications | 436 | 135,874 | Private broadcasting | 412 | 21,592 | Cable television broadcasting | 224 | 4,562 |
| (Other businesses) | | | (Other businesses) | | | (Other businesses) | | |
| Private broadcasting | 19 | 2,640 | Telecommunications | 19 | 647 | Telecommunications | 202 | 5,346 |
| Cable television broadcasting | 202 | 4,030 | Cable television broadcasting | 20 | 226 | Private broadcasting | 20 | 238 |

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

(2) Breakdown of sales

- Examining the breakdown of sales for the telecommunications business in FY2013 by sound or data transmission, sales from data transmission used for such purposes as an Internet connection continued to increase, accounting for 55.0% of the total (up 4.5 points). Examining fixed/mobile communications, mobile communications accounted for 56.0% (down 0.4 points).
- With regard to the breakdown of sales for FY2013 for the private broadcasting business, 74.9% of the total sales were from terrestrial television broadcasting services (up 1.2 points) and 5.7% were from terrestrial radio broadcasting services (down 0.7 points).
- Of the total sales of the cable television broadcasting business in FY2013, 78.3% were from basic services (down 3.6 points), and 8.5% from pay services (up 3.4 points).

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

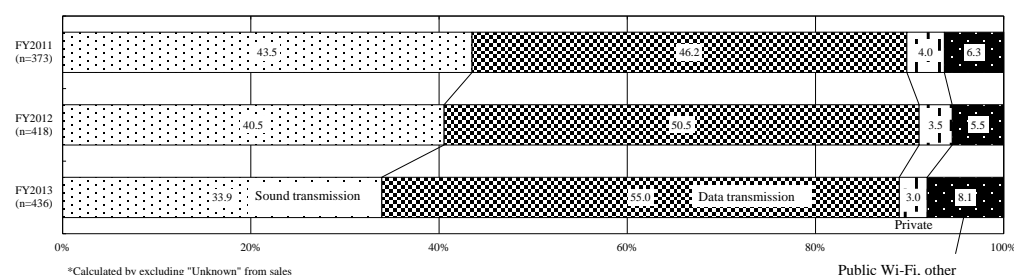


Fig. 2-8 Changes in the Breakdown of Sales for the Telecommunications Business (By Fixed/Mobile)

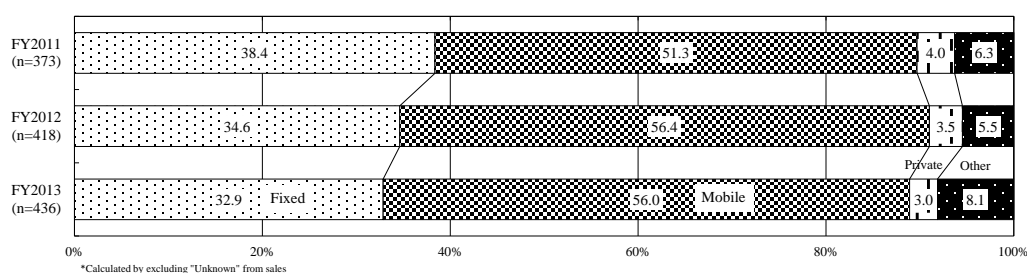


Fig. 2-9 Changes in the Breakdown of Sales for the Private Broadcasting Business

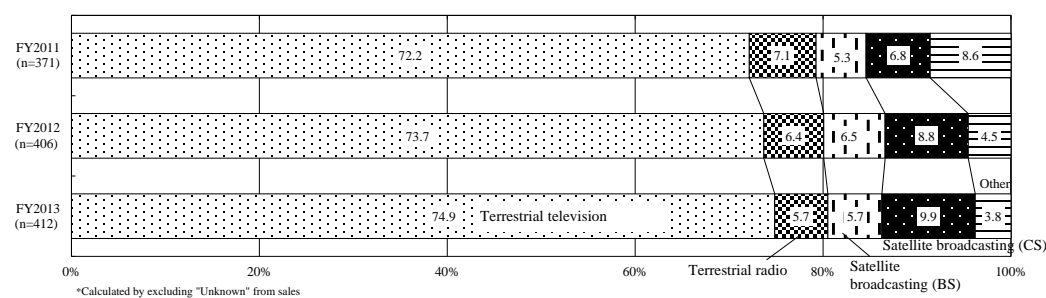
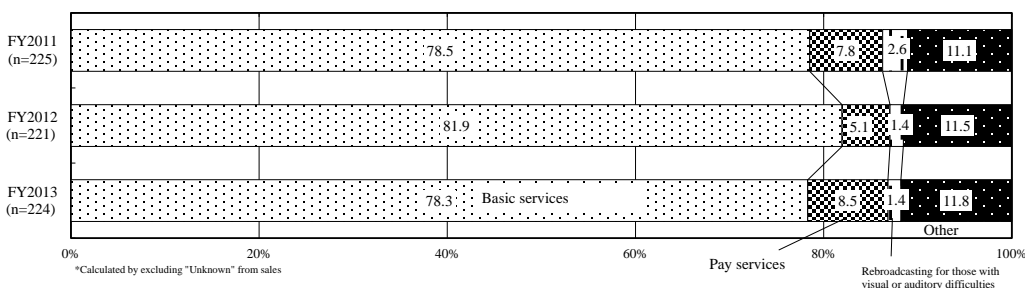


Fig. 2-10 Changes in the Breakdown of Sales of the Cable Television Broadcasting Business



3. Capital investment

- The value of acquisitions and capital investment for the telecommunications and broadcasting business in FY2013 was 1.7636 trillion yen (up 14.2%).
- The value of acquisitions and capital investment in FY2013 for companies that responded to the survey for the second consecutive year was 1.5973 trillion yen (up 4.9%).

Fig. 2-11 Changes in the Value of Acquisitions and Capital Investment by Business Type

(Unit: companies, 100 million yen, %)

| Classification | FY2011 | | FY2012 | | FY2013 | |
|-------------------------------|---------------------|--|---------------------|--|---------------------|--|
| | Number of companies | Capital investment (composition ratio) | Number of companies | Capital investment (composition ratio) | Number of companies | Capital investment (composition ratio) |
| Overall | 623 | 15,718 (100.0%) | 687 | 15,437 (100.0%) | 688 | 17,636 (100.0%) |
| Telecommunications | 233 | 14,352 (91.3%) | 259 | 14,348 (92.9%) | 268 | 15,964 (90.5%) |
| Broadcasting | 390 | 1,366 (8.7%) | 428 | 1,089 (7.1%) | 420 | 1,672 (9.5%) |
| Private broadcasting | 194 | 717 (4.6%) | 238 | 667 (4.3%) | 235 | 977 (5.5%) |
| Cable television broadcasting | 196 | 649 (4.1%) | 190 | 422 (2.7%) | 185 | 696 (3.9%) |

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

(Unit: companies, 100 million yen, %)

| Classification | FY2012 performance | | Outlook for FY2013 | | FY2013 performance | | Outlook for FY2014 | |
|-------------------------------|---------------------|--|---------------------|--|---------------------|--|---------------------|--|
| | 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 | 534 | 15,228 (100.0%) | 444 | 9,356 (100.0%) | 534 | 15,973 (100.0%) | 445 | 9,236 (100.0%) |
| Telecommunications | 196 | 14,242 (93.5%) | 158 | 8,508 (90.9%) | 196 | 14,440 (90.4%) | 156 | 8,220 (89.0%) |
| Broadcasting | 338 | 986 (6.5%) | 286 | 848 (9.1%) | 338 | 1,533 (9.6%) | 289 | 1,016 (11.0%) |
| Private broadcasting | 184 | 618 (4.1%) | 158 | 508 (5.4%) | 184 | 916 (5.7%) | 156 | 466 (5.0%) |
| Cable television broadcasting | 154 | 367 (2.4%) | 128 | 340 (3.6%) | 154 | 617 (3.9%) | 133 | 550 (6.0%) |

4. Workers

- The number of workers engaged in the telecommunications and broadcasting business was 137,952 (up 19.3%), and the number of workers per company was 138.8.
- Examining the number of workers per company that responded to the survey for the second consecutive year, the average number of workers was 131.7.

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 | |
|--|-------------------------------------|---------|--------------------|---------|--------------|--------|----------------------|--------|-------------------------------|--------|
| | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 |
| Number of companies | 929 | 994 | 356 | 390 | 573 | 604 | 368 | 389 | 205 | 215 |
| Number of workers | 115,634 | 137,952 | 82,174 | 101,570 | 33,460 | 36,382 | 24,418 | 26,011 | 9,042 | 10,371 |
| Number of regular workers | 115,006 | 137,370 | 82,162 | 101,452 | 32,844 | 35,918 | 23,817 | 25,577 | 9,027 | 10,341 |
| Full-time worker/Regular staff member | 87,973 | 109,247 | 61,660 | 79,469 | 26,313 | 29,778 | 18,674 | 20,837 | 7,639 | 8,941 |
| Part-timers | 7,851 | 7,075 | 5,710 | 5,044 | 2,141 | 2,031 | 1,519 | 1,329 | 622 | 702 |
| Workers transferred to other companies | 12,502 | 15,101 | 11,521 | 14,151 | 981 | 950 | 835 | 782 | 146 | 168 |
| Temporary or daily workers | 628 | 582 | 12 | 118 | 616 | 464 | 601 | 434 | 15 | 30 |
| Dispatched workers | 14,388 | 17,489 | 7,348 | 10,171 | 7,040 | 7,318 | 5,813 | 6,227 | 1,227 | 1,091 |
| Number of workers per company | 124.5 | 138.8 | 230.8 | 260.4 | 58.4 | 60.2 | 66.4 | 66.9 | 44.1 | 48.2 |

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

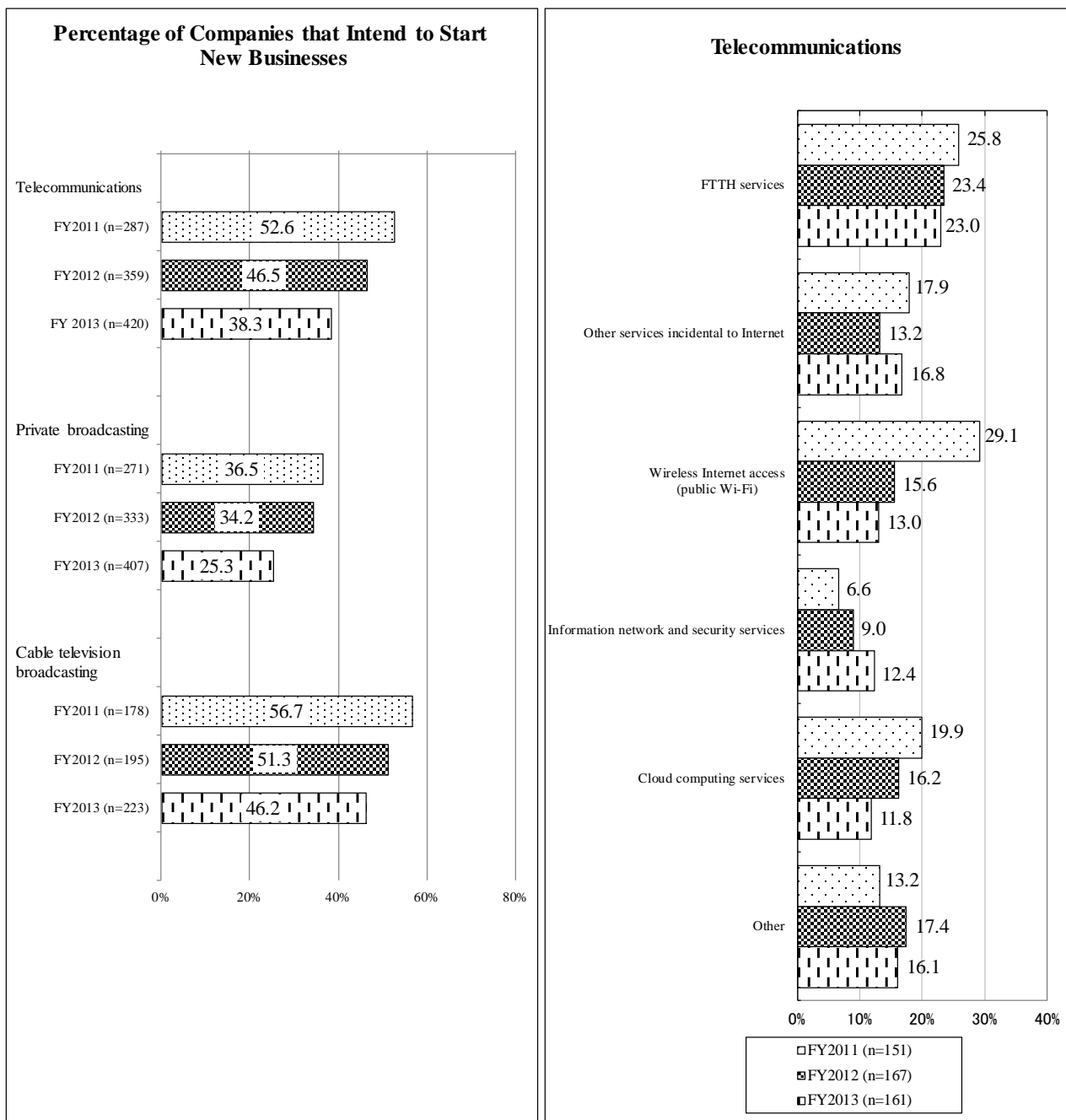
(Unit: companies, persons)

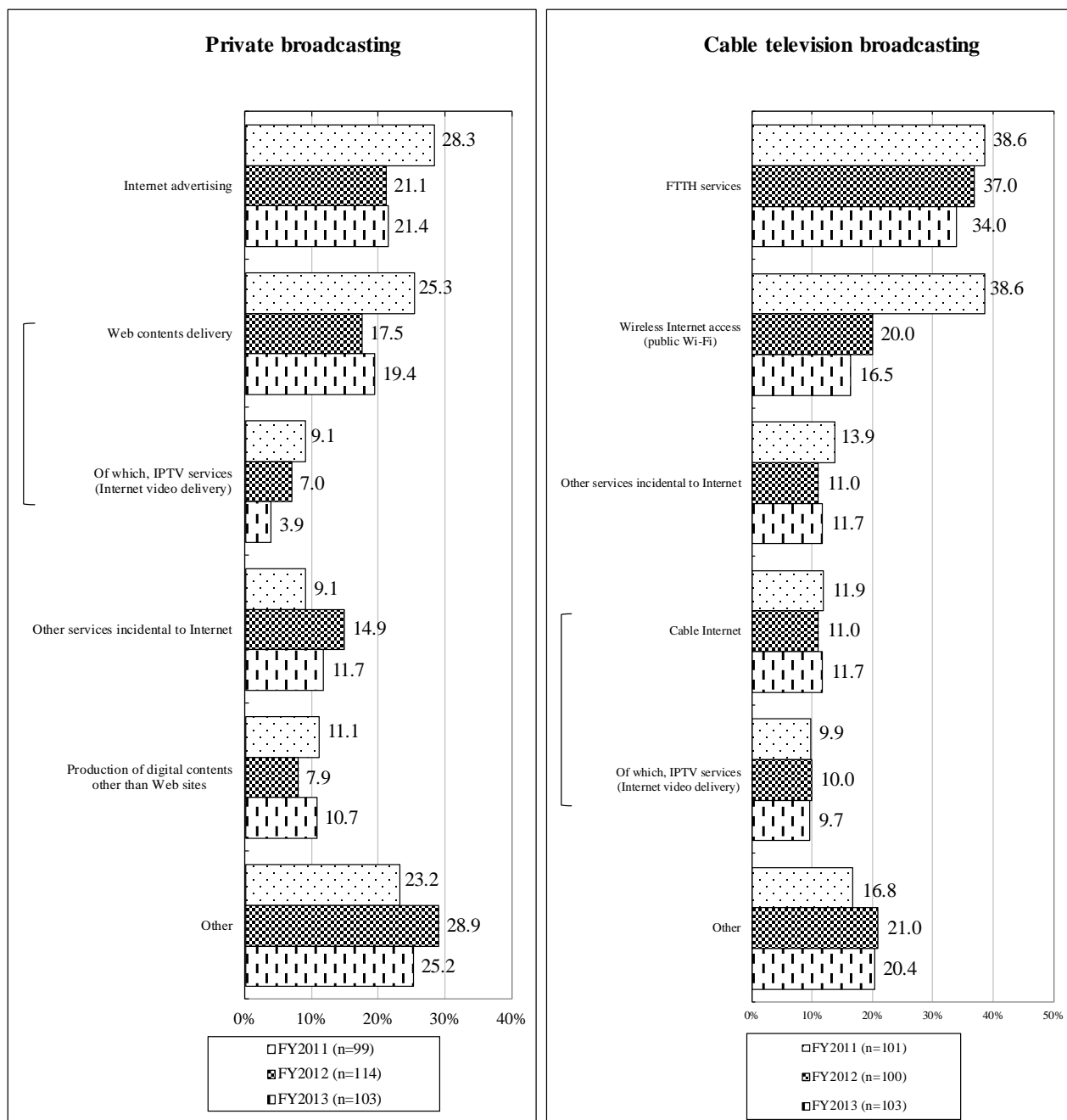
| | Telecommunications/ Broadcasting | | Telecommunications | | Broadcasting | | Private broadcasting | | Cable television broadcasting | |
|--|-------------------------------------|---------|--------------------|--------|--------------|--------|----------------------|--------|-------------------------------|--------|
| | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 |
| Number of companies | 763 | 763 | 282 | 282 | 481 | 481 | 307 | 307 | 174 | 174 |
| Number of workers | 104,441 | 100,466 | 74,193 | 70,617 | 30,248 | 29,849 | 22,359 | 21,986 | 7,889 | 7,863 |
| Number of regular workers | 103,833 | 100,055 | 74,185 | 70,590 | 29,648 | 29,465 | 21,773 | 21,626 | 7,875 | 7,839 |
| Full-time worker/Regular staff member | 78,511 | 76,845 | 54,736 | 52,774 | 23,775 | 24,071 | 17,107 | 17,343 | 6,668 | 6,728 |
| Part-timers | 7,394 | 6,362 | 5,506 | 4,648 | 1,888 | 1,714 | 1,321 | 1,163 | 567 | 551 |
| Workers transferred to other companies | 12,158 | 12,536 | 11,230 | 11,643 | 928 | 893 | 794 | 743 | 134 | 150 |
| Temporary or daily workers | 608 | 411 | 8 | 27 | 600 | 384 | 586 | 360 | 14 | 24 |
| Dispatched workers | 13,275 | 14,551 | 6,923 | 8,244 | 6,352 | 6,307 | 5,269 | 5,472 | 1,083 | 835 |
| Number of workers per company | 136.9 | 131.7 | 263.1 | 250.4 | 62.9 | 62.1 | 72.8 | 71.6 | 45.3 | 45.2 |

5. Future business operation

- The percentage of companies that intend to start new businesses within one year in the telecommunications, private broadcasting, and cable television broadcasting businesses stood at 38.3% (down 8.2 points), 25.3% (down 8.9 points), and 46.2% (down 5.1 points) respectively.
- Regarding new business fields that companies intend to enter, the most common answers were “FTTH services” (23.0% and 34.0%, respectively) in the telecommunications business and the cable television broadcasting business, and “Internet advertising” (21.4%) in the private broadcasting business.

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





(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 421 companies.

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

The number of companies engaged in the broadcast program production business was 421.

- Businesses with capital of less than 50 million yen accounted for 60.6% (down 3.3 points), and those with less than 100 workers accounted for 92.0% (up 1.0 points). Most of the companies engaged in this business were small and medium-sized.
- By sales, businesses with sales of “Less than 50 million yen” were the largest portion, accounting for 29.9% (up 6.6 points), followed by those with sales of “100 million yen to less than 300 million yen” (21.4% (down 2.5 points)) and those with sales of “1 billion yen or more” (17.1% (down 1.7 points)).

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

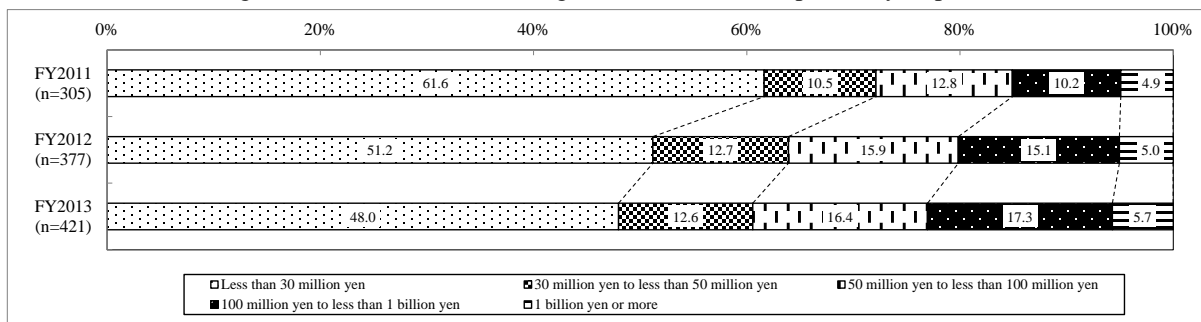


Fig. 3-2 Ratio of Broadcast Program Production Companies by Number of Workers

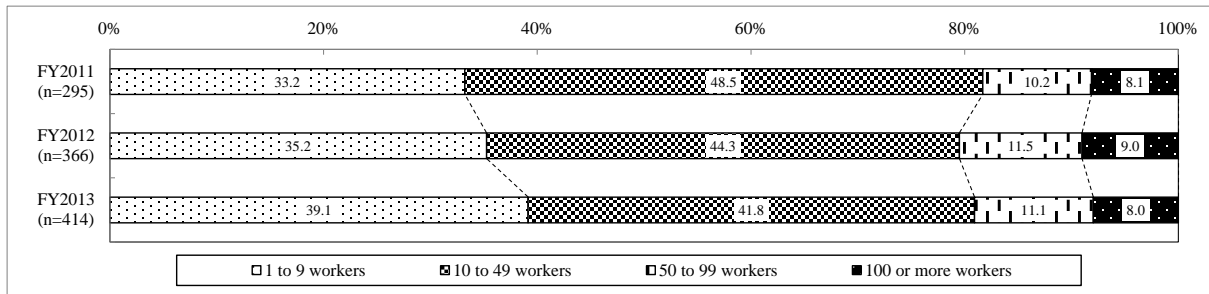
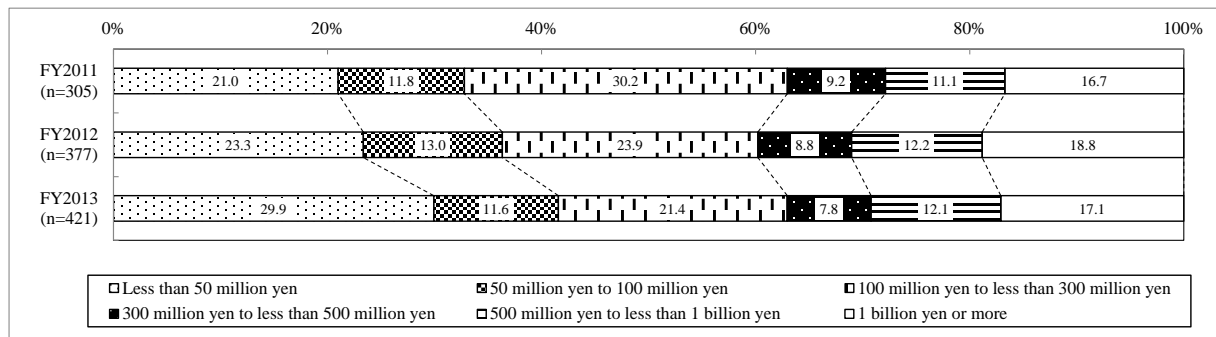


Fig. 3-3 Ratio of Broadcast Program Production Companies by Sales



2. Sales

- Sales of the broadcast program production business in FY2013 were 379.1 billion yen (up 16.4%). Average sales per company were 900 million yen (up 4.7%).
- Examining sales of companies that responded to the survey for the second consecutive year, the amount increased from 267.9 billion yen in FY2012 to 273.7 billion yen in FY2013 (up 2.2%).

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

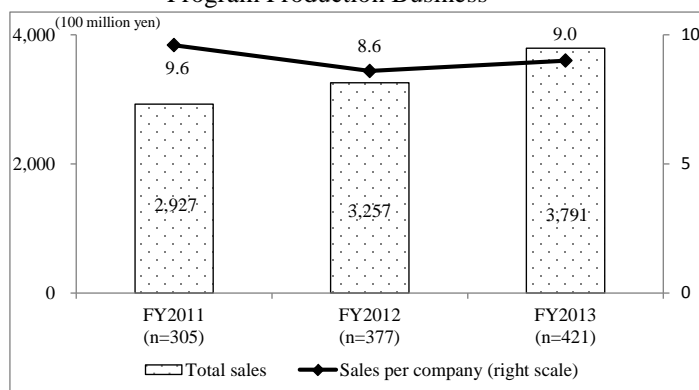
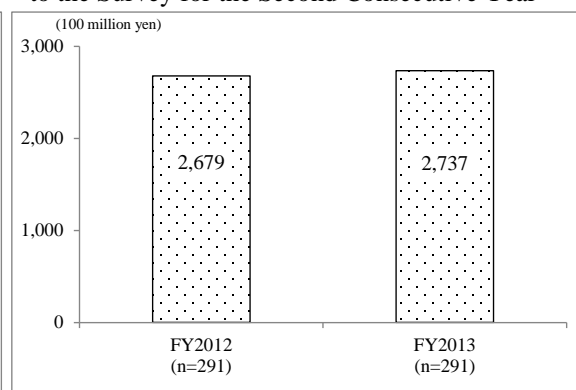


Fig. 3-5 Changes in Sales of Companies that Responded to the Survey for the Second Consecutive Year



3. Secondary use of television broadcast programs

- With regard to broadcast programs for which secondary use is possible based on a company's own intent, the percentage of broadcast program producers that are actually carrying out secondary usage was 83.8% (down 1.7 points).
- Examining the types of secondary usage, “rebroadcasting programs” accounted for 71.5% (up 10.1 points), “making the program into a video (incl. DVDs, BDs, and CD-ROMs)” accounted for 53.3% (up 8.3 points), and “using the program as a cable TV program” accounted for 32.7% (up 1.7 points).

Fig. 3-6 Secondary Usage of Television Broadcast Programs

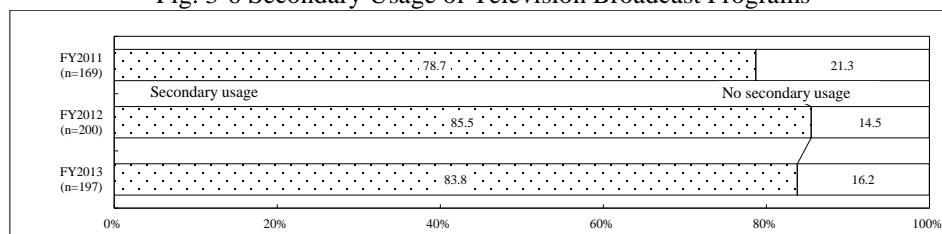
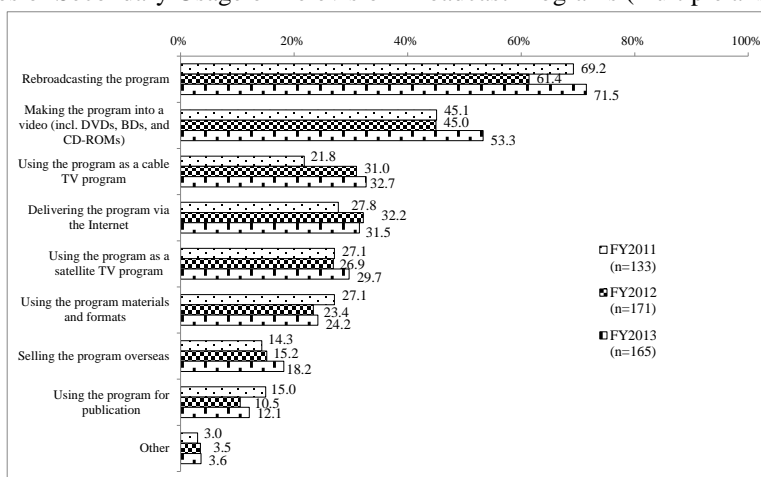


Fig. 3-7 Types of Secondary Usage of Television Broadcast Programs (multiple answers allowed)



4. Capital investment

(1) Ratios of capital investment to sales

- The value of acquisition and capital investment for the broadcast program production business (companies that provided valid answers to both sales and capital investment) in FY2013 was 10.99 billion yen (up 62.6%) and the ratio of capital investment to sales was 4.5% (up 1.4 points).

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

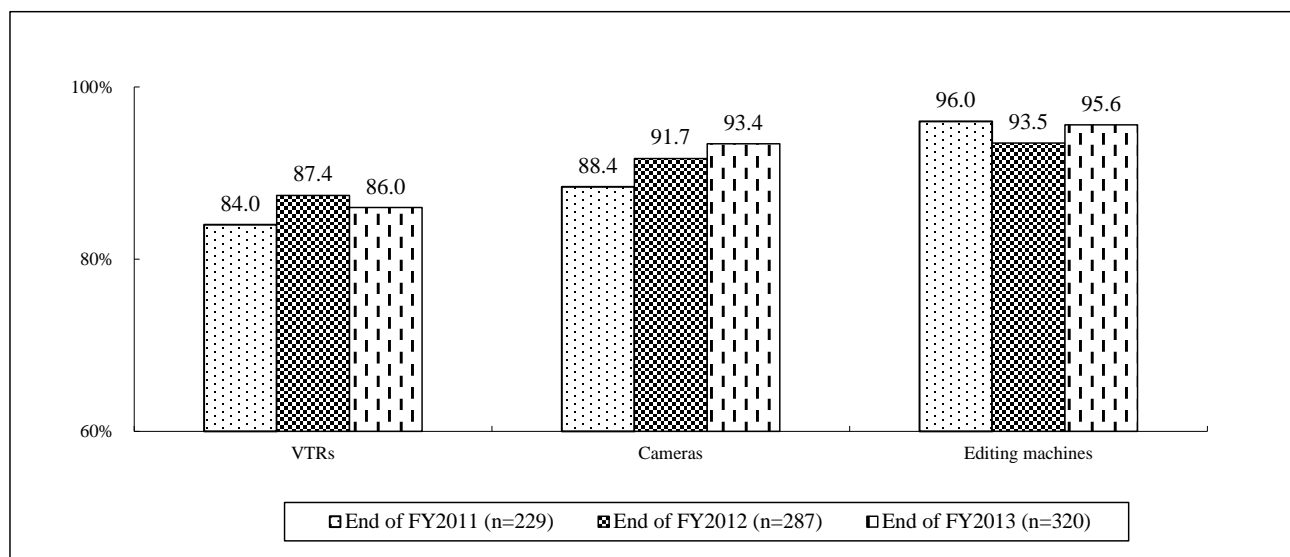
| | Number of companies (companies) | Sales (million yen) | Sales per company (million yen) | Amount of acquisitions and capital investments (million yen) | Amount of acquisitions and capital investment per company (million yen) | Ratios of capital investment to sales (%) | (Special tabulation) Companies that responded to the survey for the second consecutive year | | |
|---------------------------------|---------------------------------|---------------------|---------------------------------|--|---|---|---|--|---|
| | | | | | | | Sales per company (million yen) | Amount of acquisitions and capital investments per company (million yen) | Ratios of capital investment to sales (%) |
| FY2012 performance | 164 | 217,401 | 1,325.6 | 6,756 | 41.2 | 3.1 | 1,441.9 | 45.8 | 3.2 |
| FY2013 performance | 196 | 242,627 | 1,237.9 | 10,988 | 56.1 | 4.5 | 1,420.5 | 44.7 | 3.1 |
| Year-on-year (%) / Gap (points) | 19.5 | 11.6 | -6.6 | 62.6 | 36.1 | 1.4pt | -1.5 | -2.3 | -0.1pt |

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

(2) Digitalization of equipment

- Looking at the digitalization of equipment used for broadcast program production, 86.0% of VTRs (down 1.4 points), 93.4% of cameras (up 1.7 points), and 95.6% of editing machines (up 2.1 points) were digitalized.

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



5. Workers

- The number of workers engaged in the broadcast program production business was 13,946 (up 3.5%), out of which 13,739 were regular workers (up 3.3%).
- The average number of workers per company was 33.7.

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

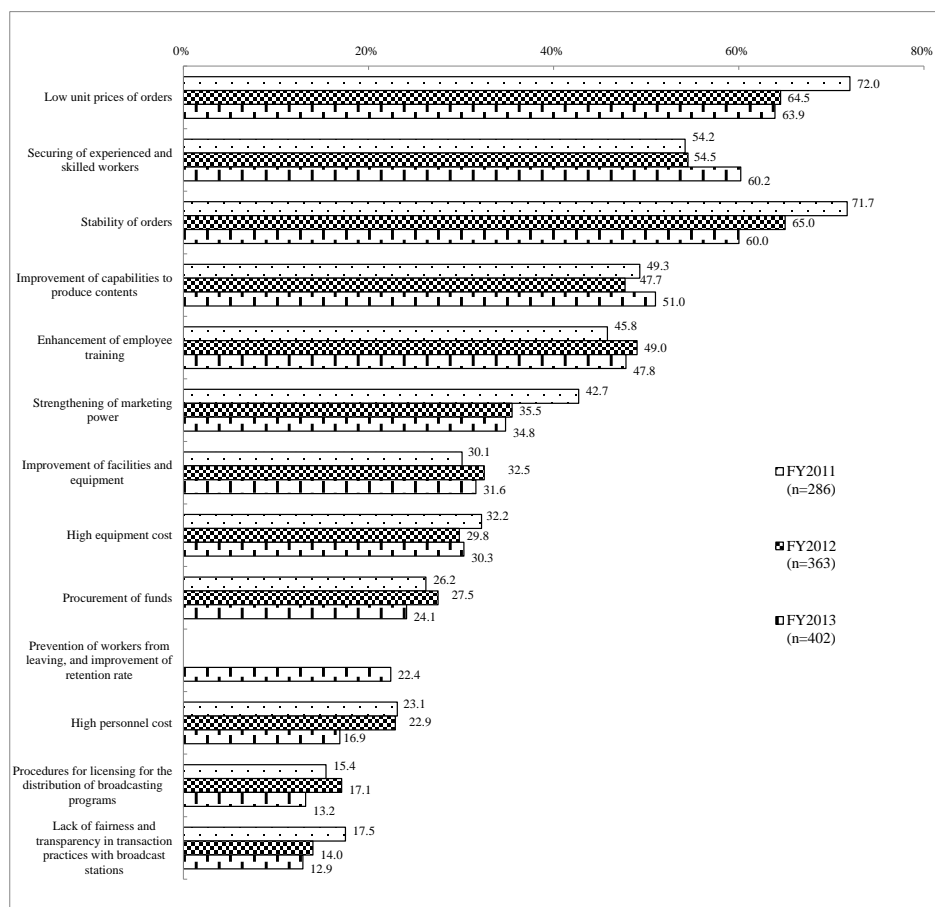
(Unit: companies, persons)

| | 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 | |
|---|---------|--------|--------------------------|--------|--|--------|---|--------|--|--------|-----------------------|--------|
| | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 | FY2012 | FY2013 |
| Number of companies | 366 | 414 | 188 | 200 | 47 | 53 | 58 | 69 | 54 | 69 | 19 | 23 |
| Number of workers | 13,476 | 13,946 | 5,075 | 4,732 | 2,020 | 1,789 | 2,169 | 2,425 | 3,079 | 4,211 | 1,133 | 789 |
| Regular workers | 13,294 | 13,739 | 5,008 | 4,645 | 1,988 | 1,761 | 2,160 | 2,393 | 3,005 | 4,151 | 1,133 | 789 |
| Full-time workers/Regular staff members | 10,521 | 11,177 | 3,884 | 3,599 | 1,672 | 1,512 | 1,583 | 2,091 | 2,557 | 3,412 | 825 | 563 |
| Part-timers | 865 | 923 | 312 | 396 | 129 | 93 | 38 | 51 | 314 | 359 | 72 | 24 |
| Workers transferred to other companies | 297 | 230 | 169 | 120 | 41 | 40 | 45 | 37 | 37 | 33 | 5 | - |
| Temporary or daily workers | 182 | 207 | 67 | 87 | 32 | 28 | 9 | 32 | 74 | 60 | - | - |
| Dispatched workers | 767 | 716 | 120 | 166 | 272 | 88 | 81 | 42 | 227 | 387 | 67 | 33 |
| Number of workers per company | 36.8 | 33.7 | 27.0 | 23.7 | 43.0 | 33.8 | 37.4 | 35.1 | 57.0 | 61.0 | 59.6 | 34.3 |

6. Management problems

- As management problems in the broadcast program production business, approximately 60% of businesses answered “low unit prices of orders” (63.9% (down 0.6 points)), “securing experienced and skilled workers” (60.2% (up 5.7 points)) and “stability of orders” (60.0% (down 5.0 points)).

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



(Note) The alternative of “Prevention of workers from leaving, and improvement of retention rate” first appeared for the FY2013 survey.

Chapter 4 Business of Services Incidental to Internet

This Chapter shows the results of the Survey on Items for Each Business Type (Services Incidental to Internet) based on valid responses from 577 companies.

1. Number of companies and sales

- The total sales of the services incidental to internet in FY2013 were 1.7256 trillion yen (up 23.0%), the largest since the start of the survey.
- Average sales per company were 2.99 billion yen in (up 17.7%). Increases were seen in Web content delivery services (up 85.7%) and Shopping site operation and auction site operation (up 15.6%), among others.
- Examining companies that provided the percentage of their advertising revenue by service type, advertising revenue was the largest for Web information search services, accounting for 89.5% of the total revenue (down 5.4 points).

Fig. 4-1 Number of Companies and Sales by Service Type (Based on Companies' Activities)

| | Number of companies | | | Sales (million yen) | | | Sales per company (million yen) | | |
|---|---------------------|--------|------------------|---------------------|-----------|------------------|---------------------------------|---------|------------------|
| | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) |
| Total | 552 | 577 | 4.5 | 1,402,557 | 1,725,641 | 23.0 | 2,540.9 | 2,990.7 | 17.7 |
| Web information search services | 65 | 66 | 1.5 | 140,428 | 147,435 | 5.0 | 2,160.4 | 2,233.9 | 3.4 |
| Shopping site operation and auction site operation | 82 | 80 | -2.4 | 178,373 | 201,235 | 12.8 | 2,175.3 | 2,515.4 | 15.6 |
| Electronic bulletin board services, blog services, and SNS operation | 22 | 25 | 13.6 | 166,691 | 160,058 | -4.0 | 7,576.9 | 6,402.3 | -15.5 |
| Web contents delivery services | 155 | 149 | -3.9 | 234,891 | 419,268 | 78.5 | 1,515.4 | 2,813.9 | 85.7 |
| Revenue from IPTV services | 14 | 16 | 14.3 | 6,942 | 54,761 | 688.8 | 495.9 | 3,422.6 | 590.2 |
| Cloud computing services | 123 | 139 | 13.0 | 80,214 | 94,314 | 17.6 | 652.1 | 678.5 | 4.0 |
| Electronic authentication services | 13 | 10 | -23.1 | 11,804 | 4,345 | -63.2 | 908.0 | 434.5 | -52.1 |
| Information network security services | 60 | 63 | 5.0 | 55,729 | 50,300 | -9.7 | 928.8 | 798.4 | -14.0 |
| Charging/settlement agent services | 22 | 28 | 27.3 | 126,659 | 144,678 | 14.2 | 5,757.2 | 5,167.1 | -10.2 |
| Server management consignment | 103 | 103 | 0.0 | 49,866 | 50,334 | 0.9 | 484.1 | 488.7 | 1.0 |
| Other services incidental to Internet | 159 | 186 | 17.0 | 350,645 | 446,718 | 27.4 | 2,205.3 | 2,401.7 | 8.9 |
| (Special tabulation) Companies that responded to the survey for the second consecutive year | 436 | 436 | - | 1,251,807 | 1,492,667 | 19.2 | 2,871.1 | 3,423.5 | 19.2 |

(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 Changes in Sales

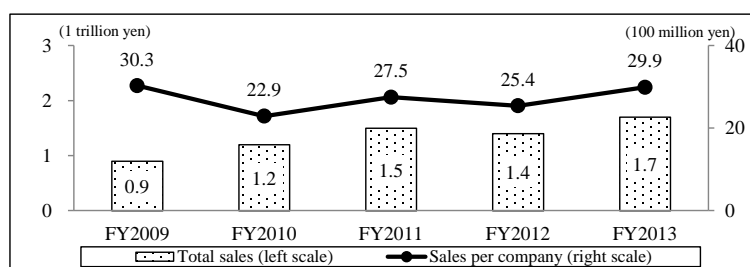


Fig. 4-3 Percentage of Advertising Revenue by Service Type

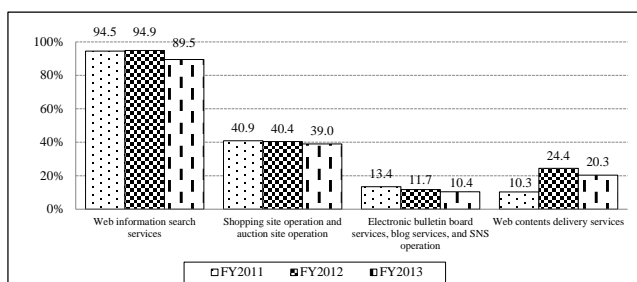
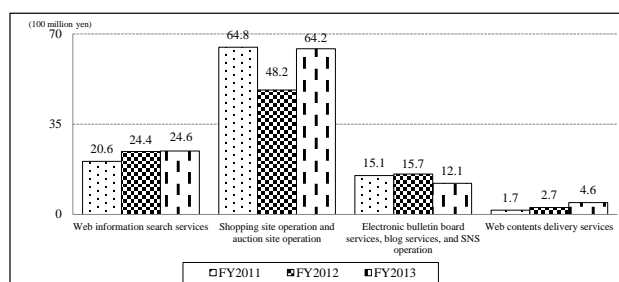


Fig. 4-4 Advertising Revenue per Company by Service type



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

2. Capital investment

- The value of acquisitions and capital investment per company was 350 million yen in FY2013 (up 0.7%). The outlook for the next fiscal year (FY2014) is 300 million yen (up 31.5%).
- The ratio of capital investment to sales was 8.0% in FY2013 (down 1.3 points).

Fig. 4-5 Value of Acquisitions and Capital Investment per Company

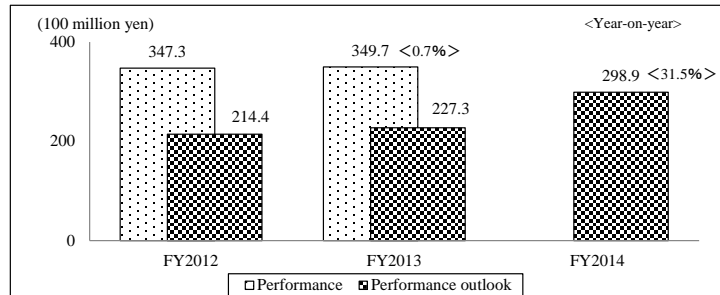


Fig. 4-6 Ratios of Capital Investment to Sales

| | 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 (%) |
| FY2012 performance | 310 | 3,735.3 | 347.3 | 9.3 | 389.0 | 9.8 |
| FY2013 performance | 332 | 4,347.8 | 349.7 | 8.0 | 389.8 | 8.1 |
| Year-on-year (%) | 7.1 | 16.4 | 0.7 | -1.3 | 0.2 | -1.7 |

(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

- 53.9% of companies implemented outsourcing (down 2.5 points).
- The outsourcing cost per company was 450 million yen (up 15.4%).

Fig. 4-7 Percentages of Companies Implementing Outsourcing

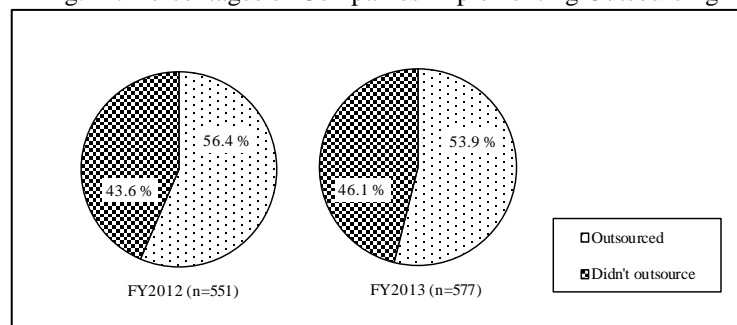
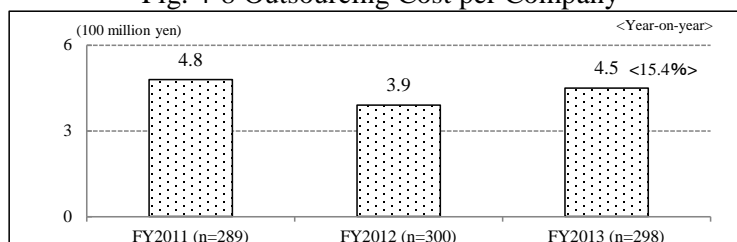


Fig. 4-8 Outsourcing Cost per Company



4. Workers

- The number of regular workers was 55,471 (up 17.3%), with increases mainly in full-time workers and part-timers. Among the regular workers, full-time workers accounted for 78.9%, while contract workers accounted for 5.1%.
- The average number of regular workers per company was 96.1 (up 10.4 persons), and that of dispatched workers was 10.8 (up 1.5 persons).
- Looking at new hires and resignees, the rate of those newly hired and that of resignees for full-time workers were 10.8% (up 1.4 points) and 7.1% (down 0.1 points), respectively. The rate of contract workers newly hired and that of those with cancelled contracts were 29.0% (up 10.7 points) and 15.2% (up 2.8 points), respectively. The rate of contract cancellation for contract workers was high when compared to the rate of resignation of full-time workers.

Fig. 4-9 Number of Workers

| | Number of workers (persons) | | | Number of workers per company (persons) | |
|---|-----------------------------|-------------------|---------------------|---|--------|
| | FY2012 (n=552) | FY2013 (n=577) | Year-on-year (%) | FY2012 | FY2013 |
| Number of workers | 47,522 | 55,607 | 17.0 | 86.1 | 96.4 |
| Number of regular workers | 47,303 | 55,471 | 17.3 | 85.7 | 96.1 |
| Full-time workers/regular staff members | 36,607 | 43,746 | 19.5 | 66.3 | 75.8 |
| Part-timers | 3,045 | 3,373 | 10.8 | 5.5 | 5.8 |
| Workers transferred to other companies | 1,843 | 2,318 | 25.8 | 3.3 | 4.0 |
| Contract workers | 2,150 | 2,836 | 31.9 | 3.9 | 4.9 |
| Other regular workers | 3,658 | 3,198 | -12.6 | 6.6 | 5.5 |
| Temporary or daily workers | 219 | 136 | -37.9 | 0.4 | 0.2 |
| Dispatched workers | 5,143 | 6,223 | 21.0 | 9.3 | 10.8 |

(Note) Other regular workers = Regular workers - Full-time workers/Regular staff members - Part-timers - Workers transferred to other companies - Contract workers

Fig. 4-10 Ratios of Regular Workers

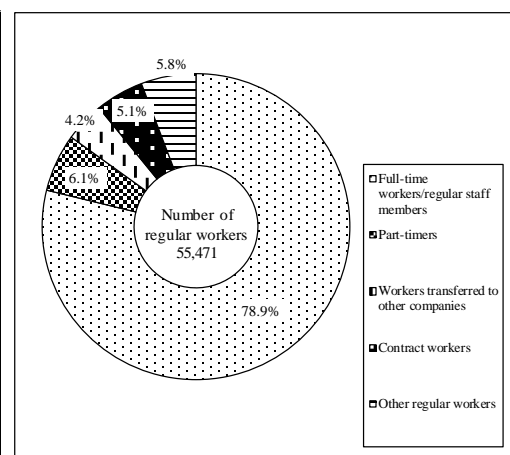
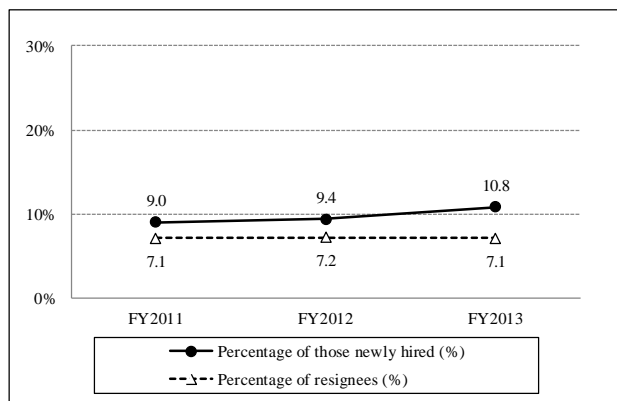
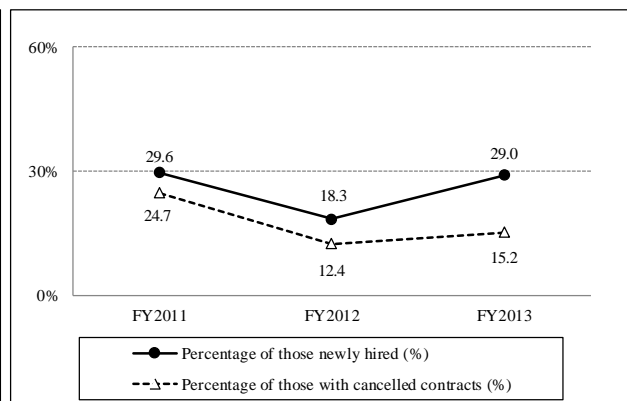


Fig. 4-11 Rate of Those Newly Hired and Resignees for Full-Time Workers/Regular Staff Members



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

Fig. 4-12 Rate of Contract Workers Newly Hired and Contract Cancellation for Contract Workers

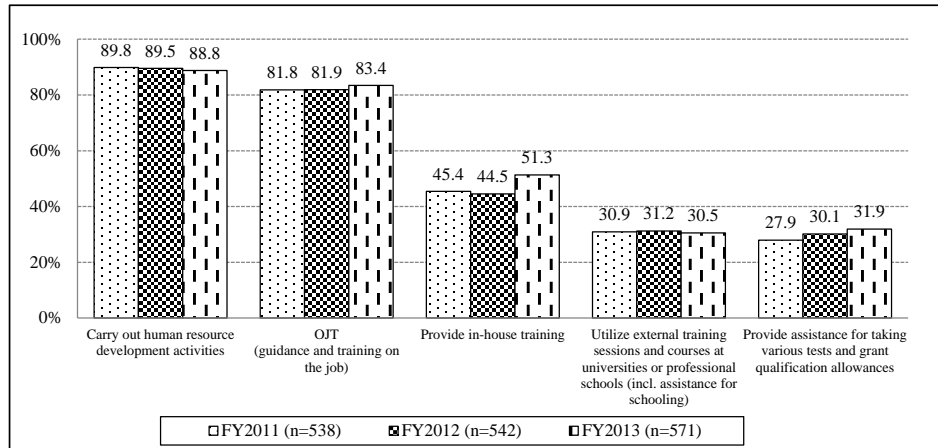


(Notes) Percentage of those newly hired = Number of those newly hired / (Number of contract workers + Number of those with cancelled contracts) × 100
 Percentage of those with cancelled contracts = Number of those with cancelled contracts / (Number of contract workers + Number of those with cancelled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

5. Human resource development

- The percentage of companies that “carry out human resource development activities” accounted for 88.8% (down 0.7 points). Of these, 83.4% provide “OJT (guidance and training on the job)” (up 1.5 points), and 51.3% “provide in-house training” (up 6.8 points).

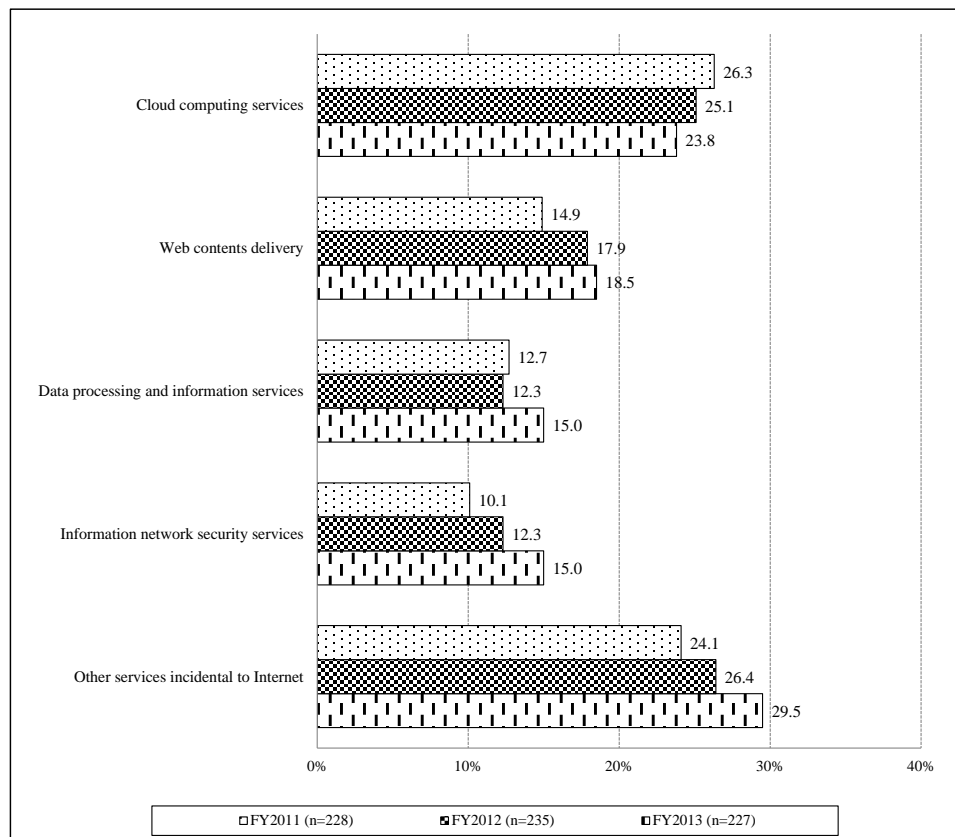
Fig. 4-13 Percentage of Companies that Carried out Human Resource Development Activities (Multiple answers allowed)



6. New business fields

- Regarding major new business fields that companies intend to enter within one year, the most common answer was “Cloud computing services” accounting for 23.8% (down 1.3 points), followed by “Web content delivery” accounting for 18.5% (up 0.6 points).

Fig. 4-14 New Businesses that Companies Intend to Enter 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 3,366 companies.

1. Number of companies and sales

- The sales for the information service business in FY2013 totaled 14.1443 trillion yen (up 1.0%), for the fourth consecutive year of increase. By sector, custom software service companies earned the largest sales, 7.0725 trillion yen, followed by data processing service companies, which made sales of 2.8053 trillion yen.
- The average sales per company was 4.20 billion yen (up 1.5%), with an increase in sales by package software service companies (up 20.9%) and game software service companies (up 12.6%).

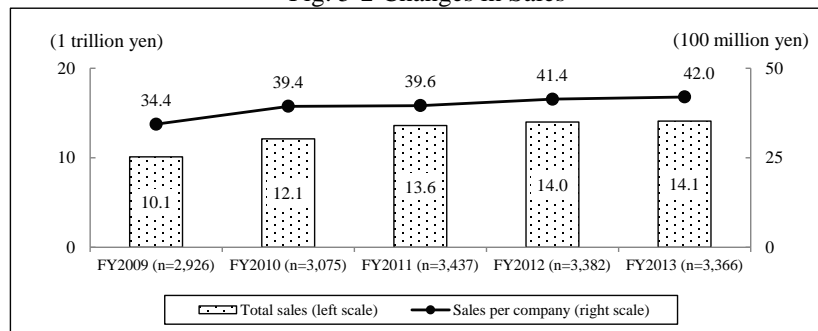
(Note) Data for Chapter 5 are compiled based on companies' main business, rated according to their business that generates the largest sales, and are tabulated as "XX companies."

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) | | |
|---|---------------------|--------|------------------|---------------------|------------|------------------|---------------------------------|---------|------------------|
| | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) |
| Total | 3,382 | 3,366 | -0.5 | 13,998,464 | 14,144,288 | 1.0 | 4,139.1 | 4,202.1 | 1.5 |
| Custom software service companies | 1,652 | 1,676 | 1.5 | 6,937,818 | 7,072,542 | 1.9 | 4,199.6 | 4,219.9 | 0.5 |
| Embedded software service companies | 110 | 98 | -10.9 | 183,662 | 161,796 | -11.9 | 1,669.7 | 1,651.0 | -1.1 |
| Package software service companies | 279 | 276 | -1.1 | 390,068 | 466,441 | 19.6 | 1,398.1 | 1,690.0 | 20.9 |
| Game software service companies | 63 | 65 | 3.2 | 480,631 | 558,242 | 16.1 | 7,629.1 | 8,588.3 | 12.6 |
| Data processing service companies | 642 | 595 | -7.3 | 2,891,529 | 2,805,273 | -3.0 | 4,503.9 | 4,714.7 | 4.7 |
| Information service companies | 117 | 123 | 5.1 | 217,393 | 228,709 | 5.2 | 1,858.1 | 1,859.4 | 0.1 |
| Market research, opinion survey and social survey service companies | - | 52 | - | - | 86,195 | - | - | 1,657.6 | - |
| Miscellaneous information service companies | 519 | 481 | -7.3 | 2,897,363 | 2,765,090 | -4.6 | 5,582.6 | 5,748.6 | 3.0 |
| (Special tabulation) Companies that responded to the survey for the second consecutive year | 2,880 | 2,880 | - | 12,694,298 | 13,124,310 | 3.4 | 4,407.7 | 4,557.1 | 3.4 |

(Note) "Market research, opinion survey and social survey service companies" have been adopted since FY2013. Hereinafter the same shall apply.

Fig. 5-2 Changes in Sales



(Reference: Based on Companies' Activities)

| | Number of companies | | | Sales (million yen) | | | Sales per company (million yen) | | |
|---|---------------------|--------|------------------|---------------------|------------|------------------|---------------------------------|---------|------------------|
| | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) |
| Total | 3,382 | 3,366 | -0.5 | 13,998,464 | 14,144,288 | 1.0 | 4,139.1 | 4,202.1 | 1.5 |
| Custom software services | 2,290 | 2,316 | 1.1 | 6,318,911 | 6,588,814 | 4.3 | 2,759.3 | 2,844.9 | 3.1 |
| Embedded software services | 291 | 276 | -5.2 | 263,640 | 246,153 | -6.6 | 906.0 | 891.9 | -1.6 |
| Package software services | 698 | 678 | -2.9 | 726,551 | 733,098 | 0.9 | 1,040.9 | 1,081.3 | 3.9 |
| Game software services | 85 | 79 | -7.1 | 471,053 | 551,154 | 17.0 | 5,541.8 | 6,976.6 | 25.9 |
| Data processing services | 1,068 | 982 | -8.1 | 3,060,246 | 2,961,872 | -3.2 | 2,865.4 | 3,016.2 | 5.3 |
| Information services, except marketing or opinion research services | 220 | 215 | -2.3 | 247,033 | 233,975 | -5.3 | 1,122.9 | 1,088.3 | -3.1 |
| Market research, opinion survey and social survey services | - | 80 | - | - | 93,936 | - | - | 1,174.2 | - |
| Miscellaneous information services | 1,078 | 1,045 | -3.1 | 2,911,030 | 2,735,286 | -6.0 | 2,700.4 | 2,617.5 | -3.1 |

(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.

- Examining the ratios of the number of companies by sector, custom software service companies accounted for the largest ratio (49.8%), followed by data processing service companies (17.7%) and miscellaneous information service companies (14.3%).
- Examining the ratios of the number of companies by sales, companies with less than 1 billion yen in sales represent 58.7%. By sector, in information service companies and package software service companies, those with less than 1 billion yen in sales represent over 60%.

Fig. 5-3 Ratio of the Number of Companies by Sector (Based on Companies' Main Business)

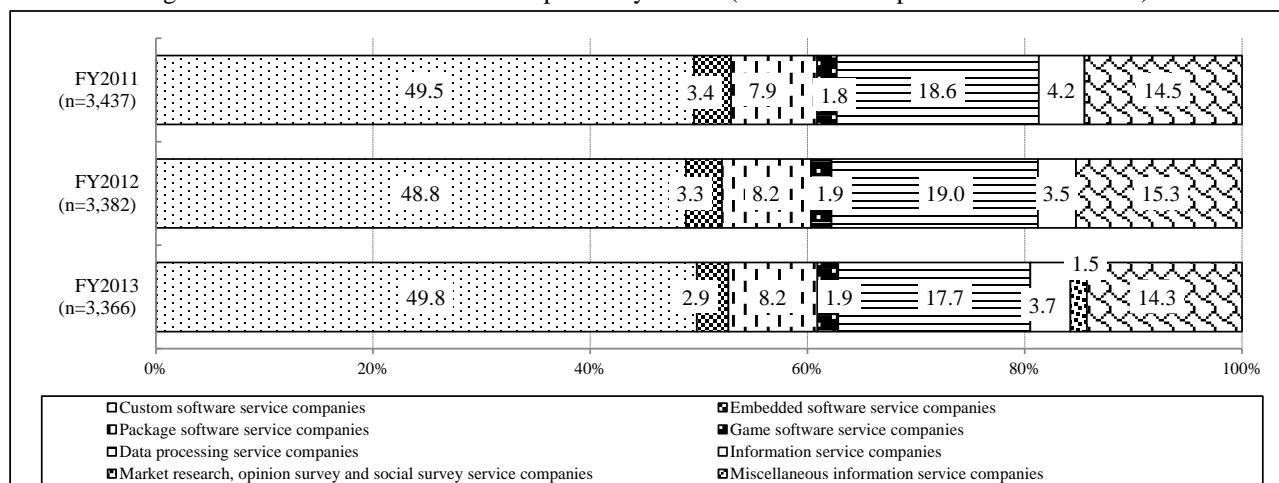
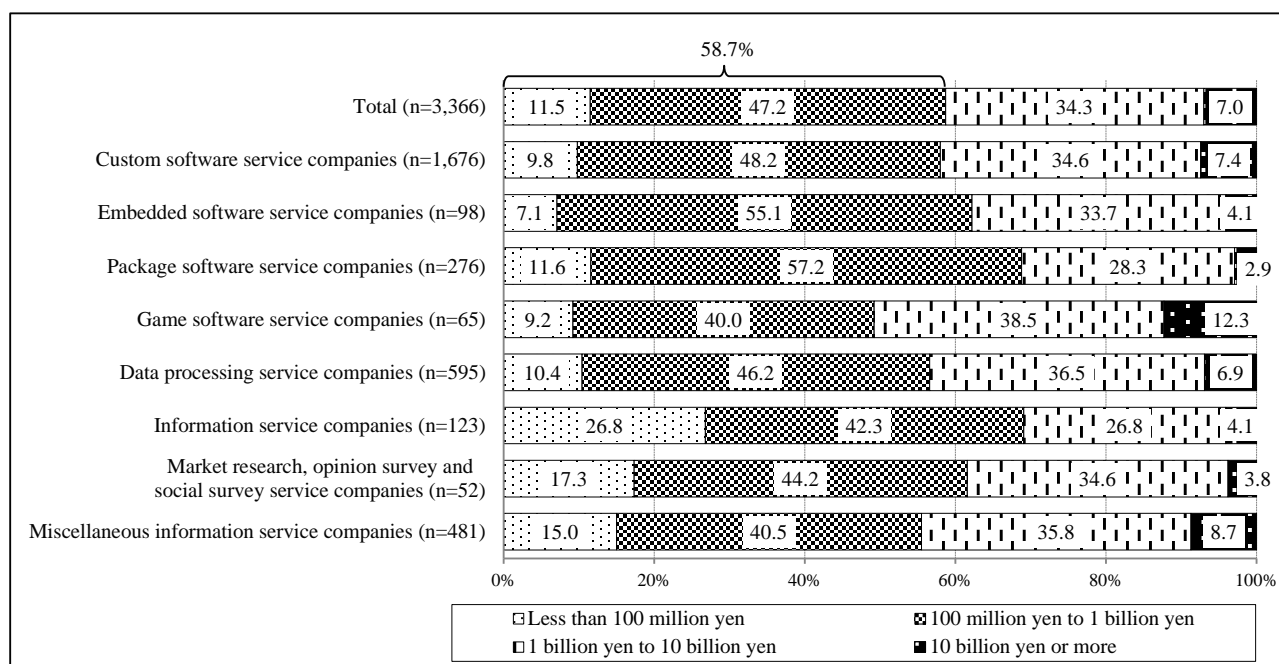


Fig. 5-4 Ratio of the Number of Companies by Sales (Based on Companies' Main Business)



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

- Companies that accepted work commissioned by other companies accounted for 89.6% (down 0.3 points).
- The average value of accepted commissioned work per company was 2.59 billion yen (up 1.2%).
- Examining the percentages of the number of companies according to primary contractors and subcontractors, the percentage of primary contractors accounted for 86.1% (down 0.4 points), and first subcontractors accounted for 56.5% (up 0.2 points). By capital, the percentage of primary contractors increased, and the percentage of subcontractors decreased, as capital was larger.

Fig. 5-5 Percentage of companies that accepted commissioned work

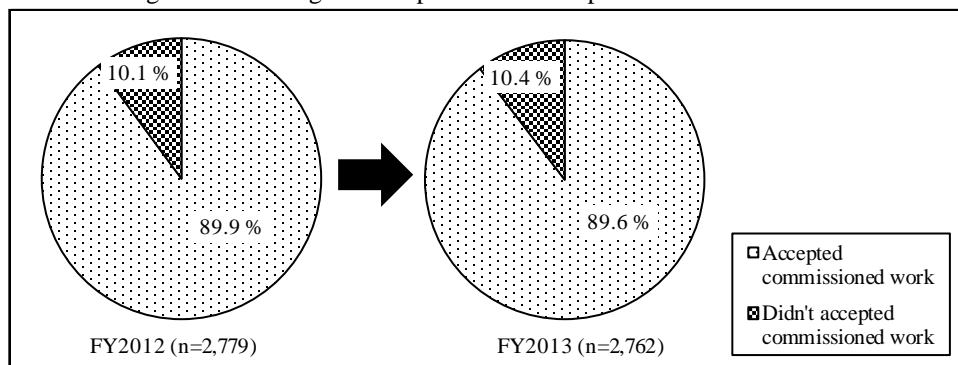


Fig. 5-6 Value of accepted commissioned work per company

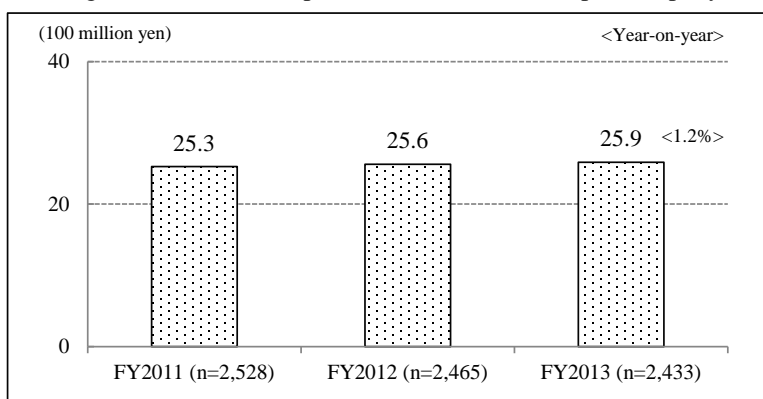


Fig. 5-7 Percentage of Number of Contractors and Subcontractors

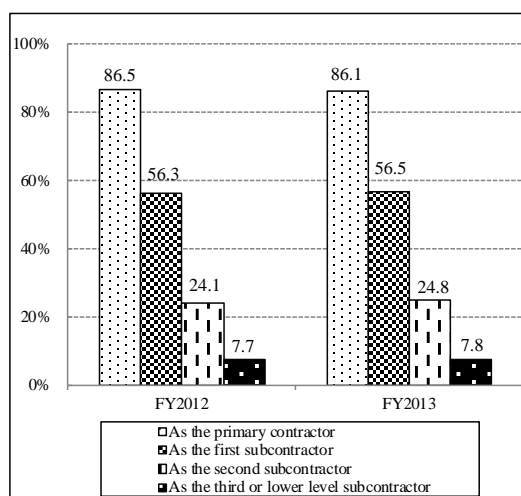
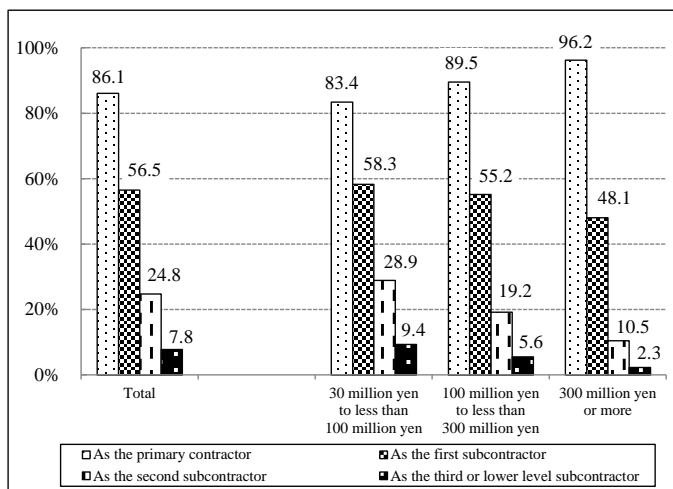


Fig. 5-8 Percentage of Number of Contractors and Subcontractors by Capital



(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

3. Outsourcing in the development and production section

- The percentage of companies that outsourced work was 77.4% (up 1.1 points).
- The average outsourcing cost per company was 1.34 billion yen (up 3.9%).
- Per company, on average, 236.8 contracts were outsourced (down 5.8%). Of these, there were sales-based payments for 54.8 contracts (up 3.4%). Sales-based payment was adopted in 23.1% (up 2.0 points).

Fig. 5-9 Percentages of Companies Implementing Outsourcing

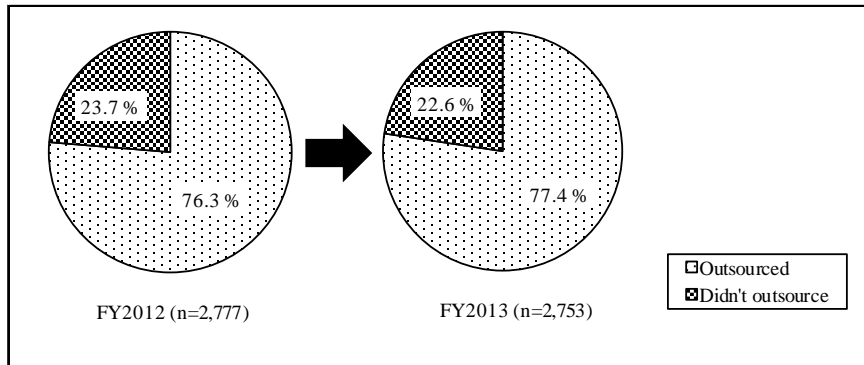


Fig. 5-10 Outsourcing Cost Per Company

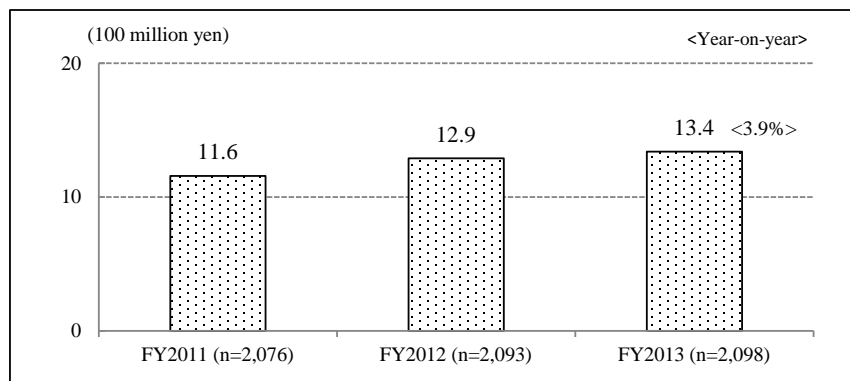
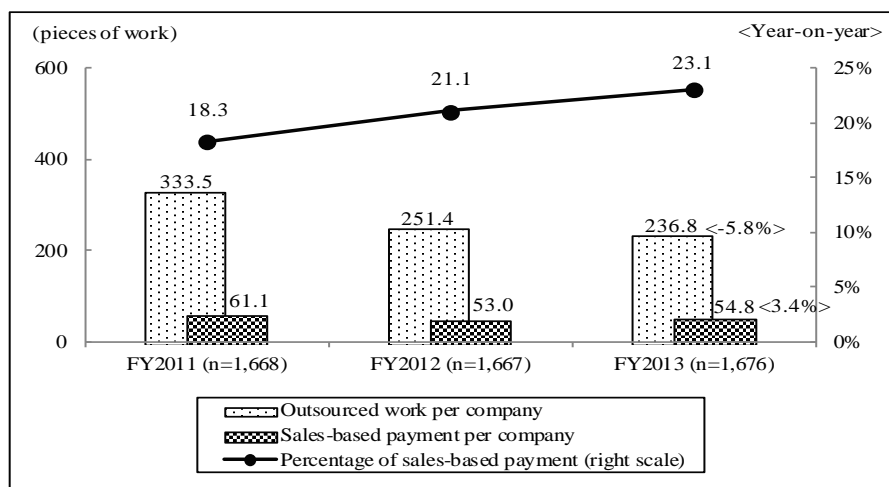


Fig. 5-11 Number of contracts Outsourced Per Company, And Percentage of Sales-Based Payment



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

4. Number of workers in the development and production section

- The number of regular workers was 463,547 (down 1.1%), with decreases both in full-time and part-time workers. Examining ratios of regular workers, full-time and contract workers accounted for 91.9% and 3.1%, respectively.
- The average number of regular workers per company was 169.5 (down 0.1 persons), and that of dispatched workers was 15.4 (up 0.9 persons).
- The percentage of newly hired full-time workers was higher than that of resignees, and so was that of newly hired contract workers in comparison to cancelled employment contracts. In comparing to full-time workers, there has been a greater change in the percentage of newly hired and cancelled contract workers.

Fig. 5-12 Number of Workers

| | Number of regular workers (persons) | | | Workers per company (persons) | |
|---|-------------------------------------|----------------------|---------------------|-------------------------------|--------|
| | FY2012□ (n=2,765) | FY2013□ (n=2,735) | Year-on-year (%) | FY2012 | FY2013 |
| Regular workers | 468,832 | 463,547 | -1.1 | 169.6 | 169.5 |
| Full-time workers/Regular staff members | 431,198 | 425,782 | -1.3 | 155.9 | 155.7 |
| Foreign workers | 5,244 | 4,852 | -7.5 | 1.9 | 1.8 |
| Part-timers | 7,640 | 7,553 | -1.1 | 2.8 | 2.8 |
| Workers transferred to other companies | 14,403 | 14,471 | 0.5 | 5.2 | 5.3 |
| Contract workers | 13,639 | 14,467 | 6.1 | 4.9 | 5.3 |
| Foreign workers | 447 | 556 | 24.4 | 0.2 | 0.2 |
| Other regular workers | 1,952 | 1,274 | -34.7 | 0.7 | 0.5 |
| Dispatched workers | 40,057 | 42,103 | 5.1 | 14.5 | 15.4 |

(Note) Other regular workers = Regular workers - Full-time workers/Regular staff members - Part-timers - Workers transferred to other companies - Contract workers

Fig. 5-13 Ratios of Regular Worker

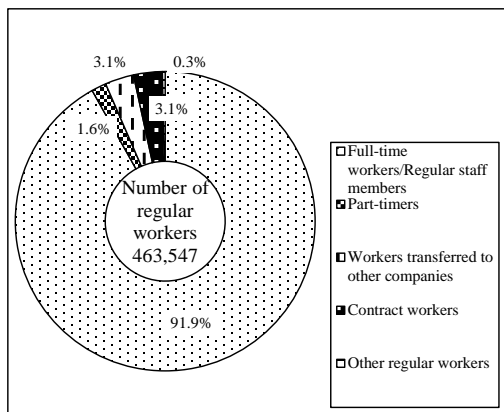


Fig. 5-14 Changes in the Number of Full-Time Workers Per Company

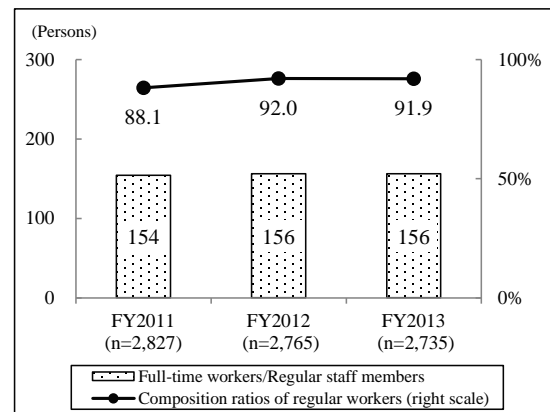
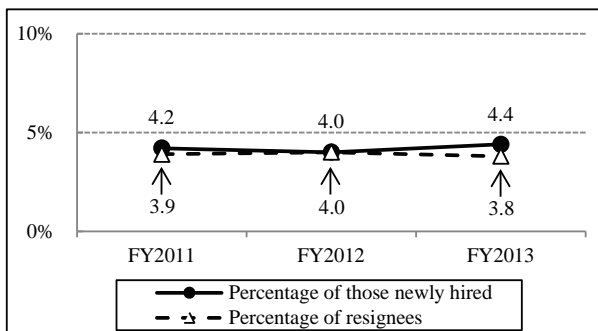
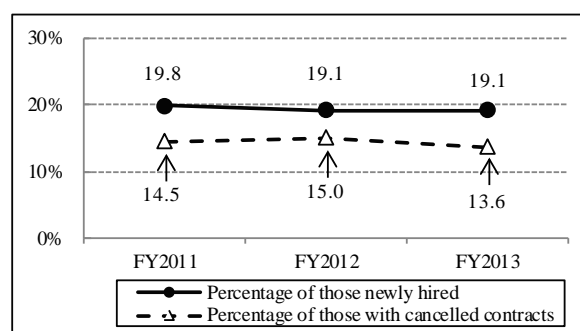


Fig. 5-15 Percentage of Full-Time Workers Newly Hired and That of Resignees



(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

Fig. 5-16 Percentage of Contract Workers Newly Hired and That of Those with Cancelled Contracts



(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 in the development and production section

- The percentage of companies that carried out human resource development activities accounted for 97.2% (down 0.2 points). Of them, 93.8% provided “OJT (guidance and training on the job)” (up 0.7 points), 70.8% provided in-house training (down 0.8 points) and 63.0% provided assistance for taking the Information Technology Engineers Examination and grant qualification allowances (down 1.1 points).
- The percentage of companies which carried out business-academia collaborations was 14.3% (down 0.1 points). The percentage of companies which offered cooperation with university programmes was 26.6% (up 1.7 points).

Fig. 5-17 Percentage of Companies that Carried out Human Resource Development Activities (Multiple answers allowed)

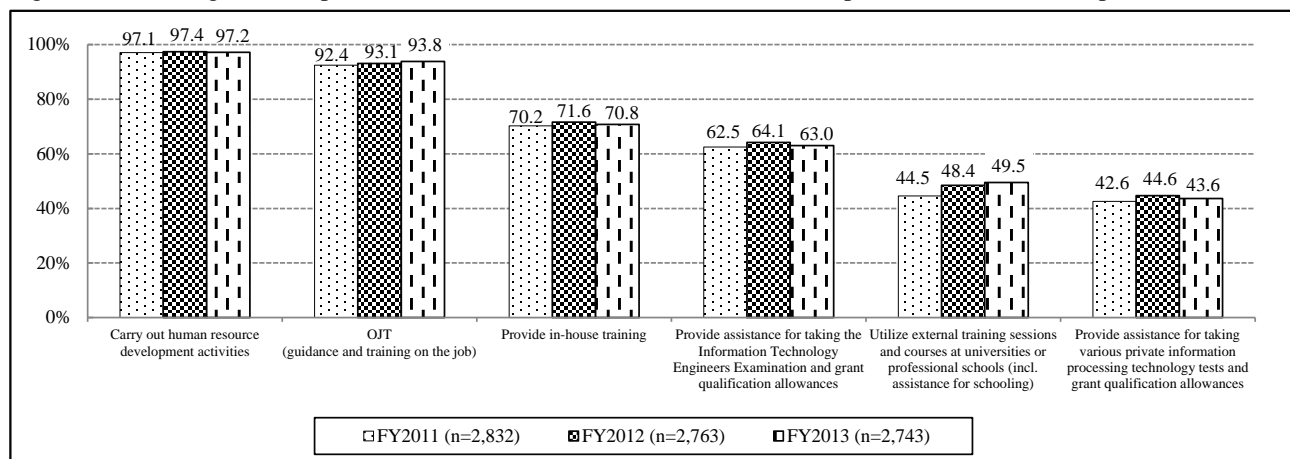


Fig. 5-18 University-related Business Operations (Business-academia collaboration)

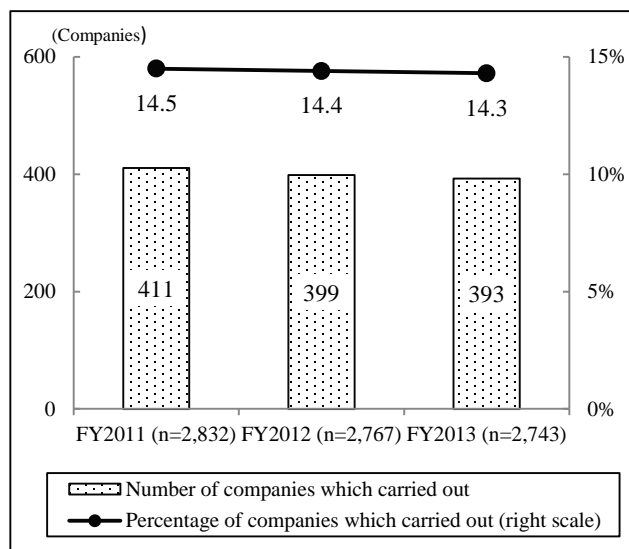
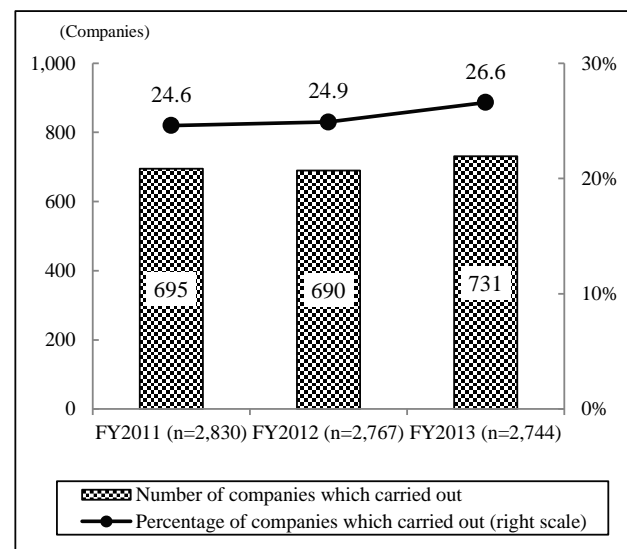


Fig. 5-19 University-related Business Operations (Cooperation with university programmes)



(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

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

This Chapter shows the results of the Survey on Items for Each Business Type (Video Picture Information, Sound Information, Character Information Production and Distribution) based on valid responses from 708 companies.

1. Number of companies and sales

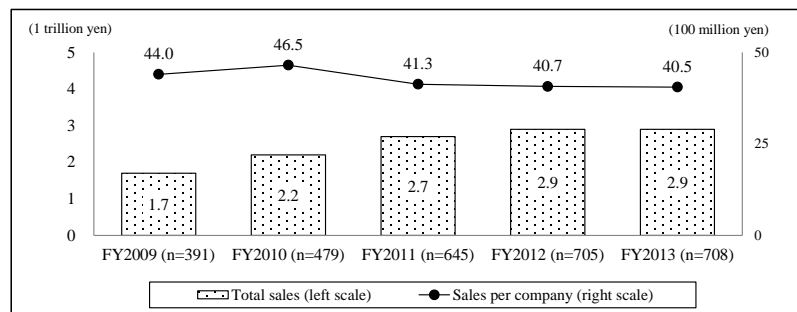
- The total sales of the video picture information, sound information, character information production and distribution business in FY2013 were 2.8677 trillion yen (0.0 points difference). By sector, newspaper publishers made the largest sales of 1.0685 trillion yen, followed by publishers, except newspapers, which saw sales of 826.9 billion yen.
- The average sales per company were 4.05 billion yen (down 0.5%).

(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) | | |
|---|---------------------|--------|------------------|---------------------|-----------|------------------|---------------------------------|----------|------------------|
| | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) |
| Total | 705 | 708 | 0.4 | 2,868,607 | 2,867,706 | 0.0 | 4,068.9 | 4,050.4 | -0.5 |
| Motion picture and video production companies | 66 | 78 | 18.2 | 92,740 | 117,236 | 26.4 | 1,405.2 | 1,503.0 | 7.0 |
| Animation production companies | 24 | 20 | -16.7 | 84,283 | 76,173 | -9.6 | 3,511.8 | 3,808.7 | 8.5 |
| Recording and disk production companies | 19 | 14 | -26.3 | 92,791 | 85,864 | -7.5 | 4,883.7 | 6,133.1 | 25.6 |
| Newspaper publishers | 100 | 101 | 1.0 | 1,016,402 | 1,068,527 | 5.1 | 10,164.0 | 10,579.5 | 4.1 |
| Publishers, except newspapers | 242 | 224 | -7.4 | 921,858 | 826,880 | -10.3 | 3,809.3 | 3,691.4 | -3.1 |
| Commercial art and graphic design companies | 125 | 133 | 6.4 | 432,226 | 456,168 | 5.5 | 3,457.8 | 3,429.8 | -0.8 |
| Motion picture, video and television program distribution companies | 21 | 23 | 9.5 | 114,208 | 103,430 | -9.4 | 5,438.5 | 4,497.0 | -17.3 |
| Service companies incidental to video picture information, sound information, character information production and distribution | 108 | 115 | 6.5 | 114,099 | 133,428 | 16.9 | 1,056.5 | 1,160.2 | 9.8 |
| (Special tabulation) Companies that responded to the survey for the second consecutive year | 553 | 553 | - | 2,603,822 | 2,568,946 | -1.3 | 4,708.5 | 4,645.5 | -1.3 |

Fig. 6-2 Changes in Sales



(Reference: Based on Companies' Activities)

| | Number of companies | | | Sales (million yen) | | | Sales per company (million yen) | | |
|---|---------------------|--------|------------------|---------------------|-----------|------------------|---------------------------------|---------|------------------|
| | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) | FY2012 | FY2013 | Year-on-year (%) |
| Total | 705 | 708 | 0.4 | 2,868,607 | 2,867,706 | 0.0 | 4,068.9 | 4,050.4 | -0.5 |
| Motion picture and video production service | 112 | 139 | 24.1 | 95,369 | 119,290 | 25.1 | 851.5 | 858.2 | 0.8 |
| Animation production service | 32 | 32 | 0.0 | 85,282 | 76,245 | -10.6 | 2,665.1 | 2,382.7 | -10.6 |
| Recording and disk production service | 26 | 24 | -7.7 | 77,018 | 66,843 | -13.2 | 2,962.2 | 2,785.1 | -6.0 |
| Newspaper publishers | 112 | 112 | 0.0 | 1,004,480 | 1,055,876 | 5.1 | 8,968.6 | 9,427.5 | 5.1 |
| Publishers, except newspapers | 321 | 312 | -2.8 | 924,034 | 821,822 | -11.1 | 2,878.6 | 2,634.0 | -8.5 |
| Commercial art and graphic design service | 182 | 194 | 6.6 | 434,994 | 464,108 | 6.7 | 2,390.1 | 2,392.3 | 0.1 |
| Motion picture, video and television program distribution service | 39 | 48 | 23.1 | 116,165 | 111,667 | -3.9 | 2,978.6 | 2,326.4 | -21.9 |
| Service incidental to video picture information, sound information, character information production and distribution | 175 | 188 | 7.4 | 131,265 | 151,855 | 15.7 | 750.1 | 807.7 | 7.7 |

(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.

- Examining the composition ratios of the number of companies by sector, publishers, except newspapers accounted for the majority, at 31.6% (down 2.7 points), followed by the number of commercial art and graphic design companies, at 18.8% (up 1.1 points).
- Examining the ratios of sales by sector, sales by newspaper publishers accounted for the majority, at 37.3% (up 1.9 points), followed by sales by publishers, except newspapers, at 28.8% (down 3.3 points).

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

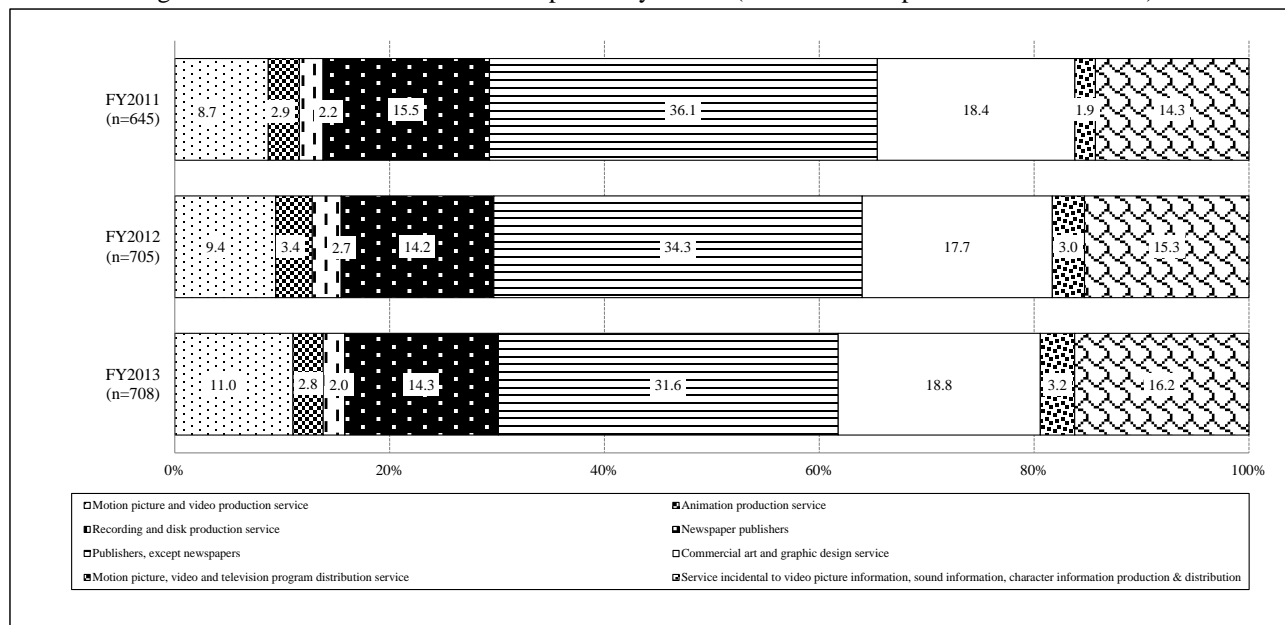
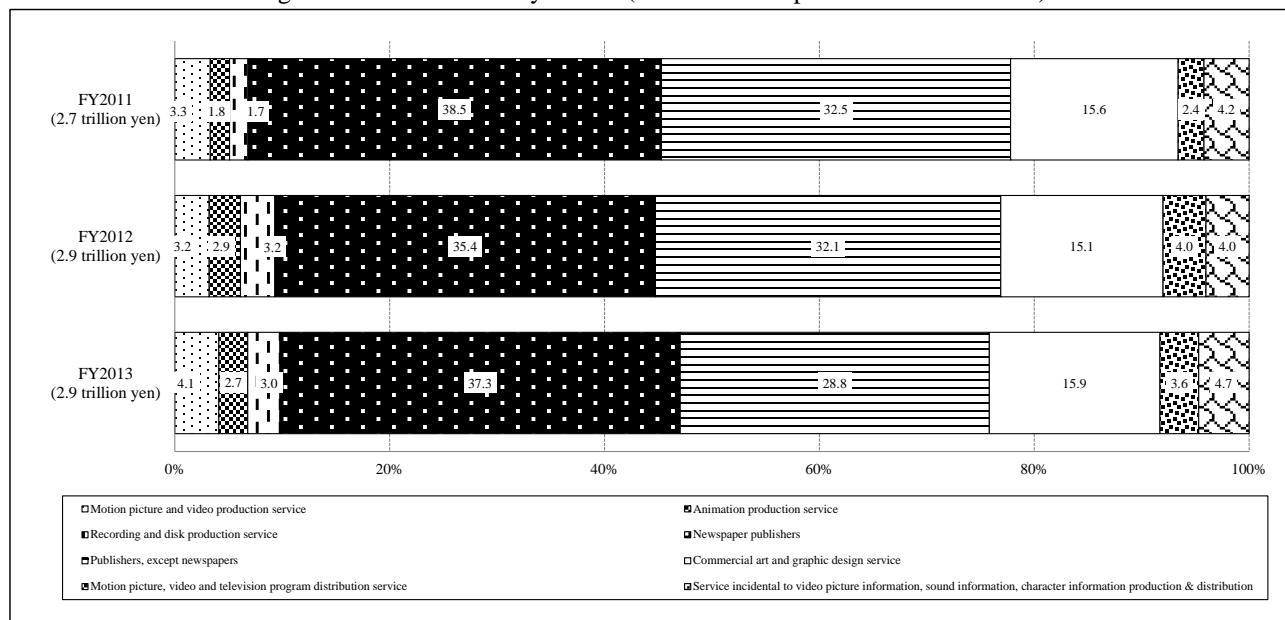


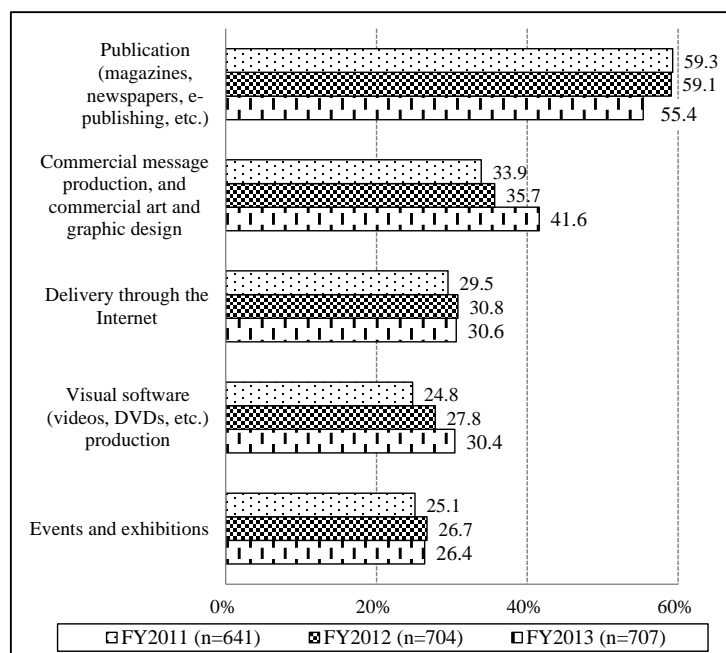
Fig. 6-4 Ratios of Sales by Sector (Based on Companies' Main Business)



2. Business operation

- Regarding business operation, 55.4% of the companies (down 3.7 points) were already engaged in “publication (magazines, newspapers, e-publishing, etc.)” and 41.6% (up 5.9 points) in “commercial message production, and commercial art and graphic design”.

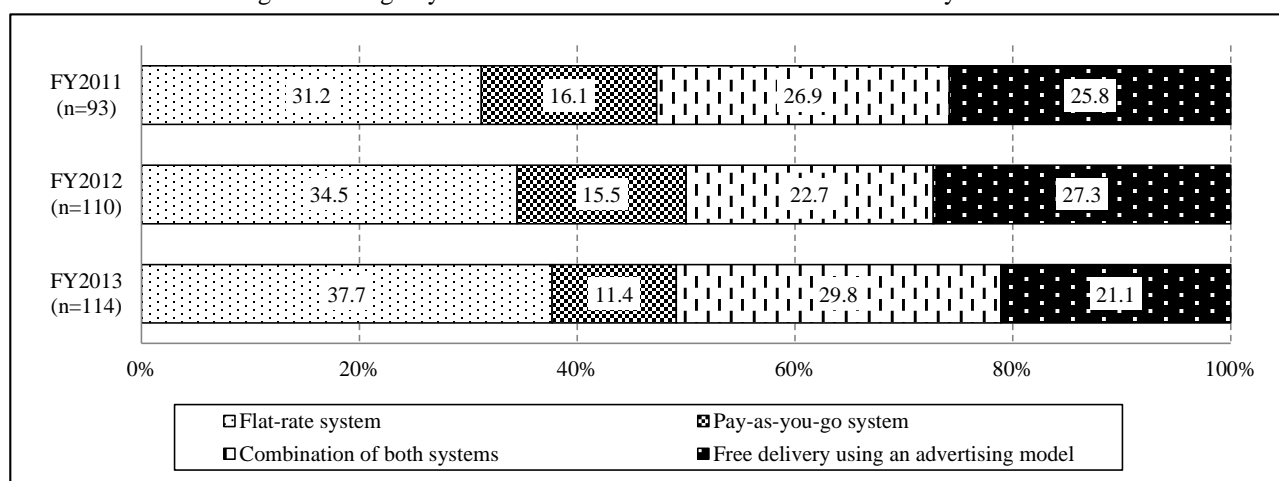
Fig. 6-5 Business Operation (Already Engaged in this Business) (high-ranking) (multiple answers allowed)



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 37.7% (up 3.2 points), followed by “combination of both systems” at 29.8% (up 7.1 points).

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



4. Content production in the content production section

- The amount of content production per company was 116.1 pieces of content (down 28.0%).
- Looking at the rights held concerning produced content, 75.2% of the companies held the full rights for primary use, and 55.6% held the full rights for secondary use. In both cases, companies holding 100% of the rights were the majority.
- By major sector, the percentage of newspaper publishers that held the full rights for the primary use was higher than other sectors (94.1%), while the percentage of motion picture and video production companies that held the full rights for the primary and secondary use was lower than other sectors (33.7% and 20.9%, respectively).

Fig. 6-7 Amount of Content Produced

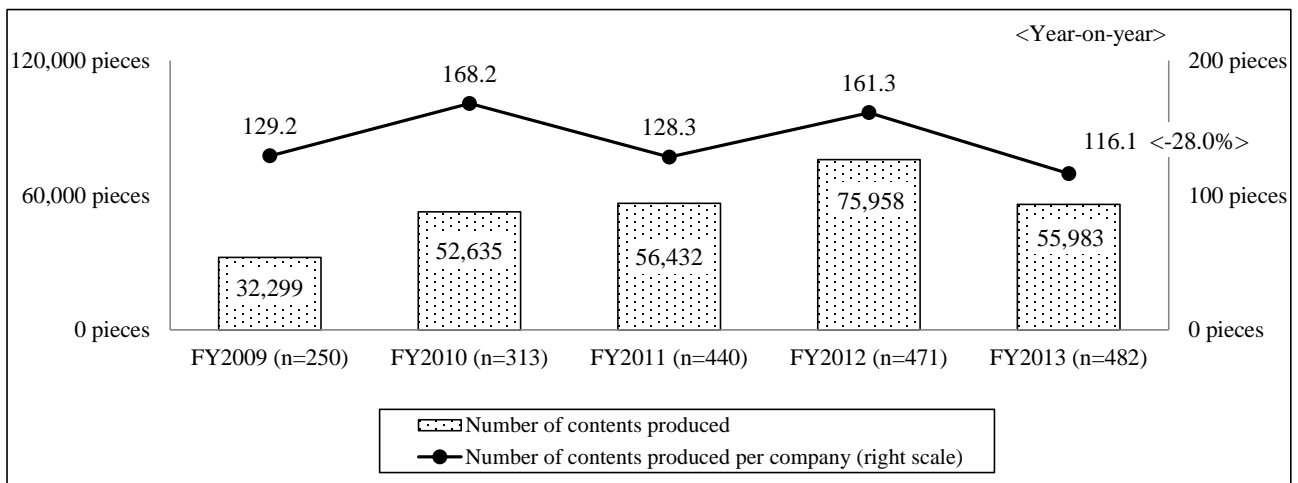
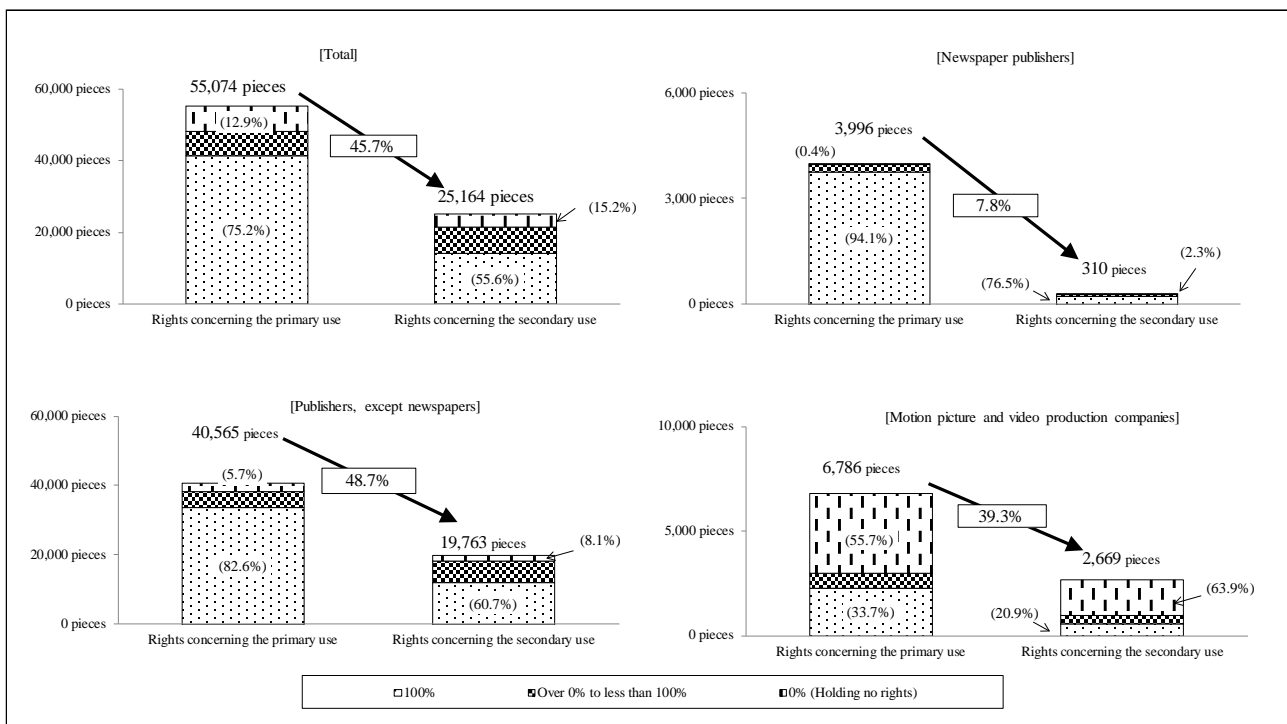


Fig. 6-8 Holding of Rights for Content Produced (Major Sectors)



5. Outsourcing in the content production section

- The percentage of companies that outsourced work was 56.2% (up 2.8 points).
- The average outsourcing cost per company was 570 million yen (down 8.1%).
- The amount of outsourced content was 20,158 pieces. Among the content outsourced, sales-based payments were adopted in 8.5% of the payments.
- By major sector, newspaper publisher sales-based payments represented 4.8%, which was less than that of other sectors.

Fig. 6-9 Percentages of Companies Implementing Outsourcing

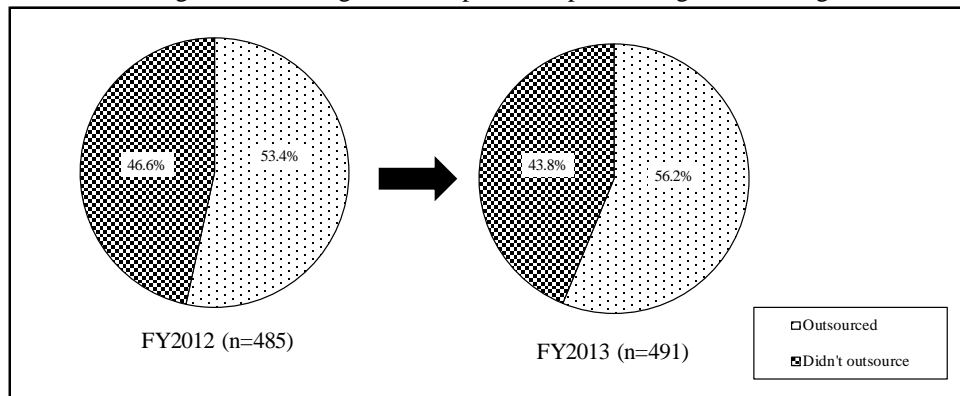


Fig. 6-10 Amount Outsourced Per Company (Major Sectors)

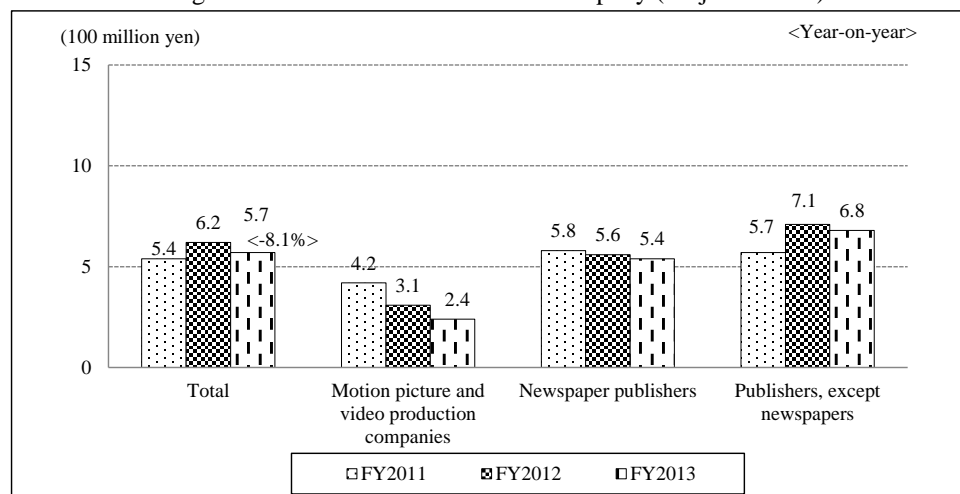
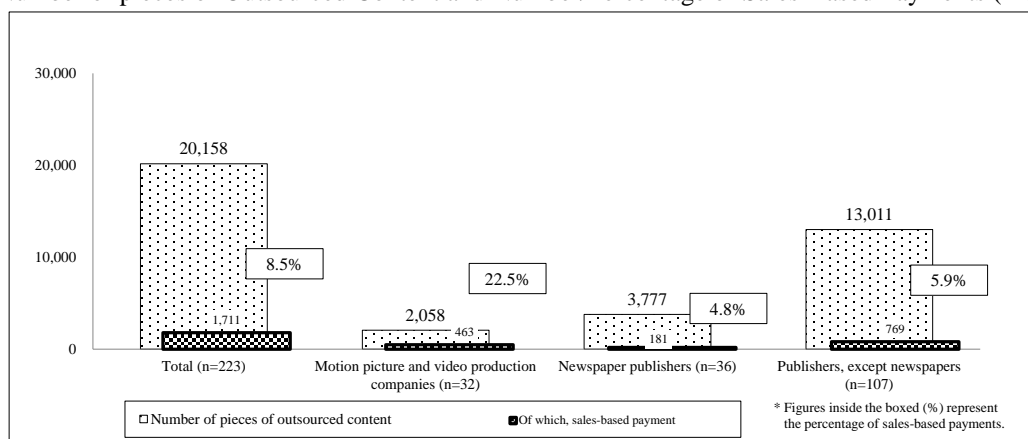


Fig. 6-11 Number of pieces of Outsourced Content and Number/Percentage of Sales-Based Payments (Major Sectors)



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

6. Number of workers in the content production section

- The number of regular workers was 41,224 (up 3.7%), with increases mainly in full-time workers and workers transferred to other companies.
- The average number of regular workers per company was 84.5 (up 1.2 persons). The number of full-time workers was 64.4 (up 1.1 persons). By major sector, newspaper publishers have the largest number of regular workers per company, averaging 199 persons, while motion picture and video production companies have the smallest, at 36 persons.
- Comparing the rate of newly hired employees to resignees for full-time workers, they were 2.5% (0.0 points difference) and 2.7% (down 0.3 points), respectively. The rate of newly hired contract workers was 18.6% (up 9.1 points), and that of those with cancelled contracts was 9.6% (down 1.8 points). The rate of contract cancellations for contract workers was high when compared to the rate of resignation of full-time workers.

Fig. 6-12 Number of workers in the content production section

| | Number of workers (person) | | | Number of workers per company (person) | |
|---|----------------------------|--------------------|---------------------|--|--------|
| | FY2012□ (n=477) | FY2013□ (n=488) | Year-on-year (%) | FY2012 | FY2013 |
| Number of regular workers | 39,753 | 41,224 | 3.7 | 83.3 | 84.5 |
| Full-time workers/Regular staff members | 30,173 | 31,417 | 4.1 | 63.3 | 64.4 |
| Part-timers | 3,124 | 2,984 | -4.5 | 6.5 | 6.1 |
| Workers transferred to other companies | 1,000 | 1,141 | 14.1 | 2.1 | 2.3 |
| Contract workers | 3,310 | 3,322 | 0.4 | 6.9 | 6.8 |
| Other regular workers | 2,146 | 2,360 | 10.0 | 4.5 | 4.8 |
| Temporary or daily workers | 160 | 289 | 80.6 | 0.3 | 0.6 |
| Dispatched workers | 1,233 | 1,209 | -1.9 | 2.6 | 2.5 |

(Note) Other regular workers = Regular workers - Full-time workers/Regular staff members - Part-timers - Workers transferred to other companies - Contract workers

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

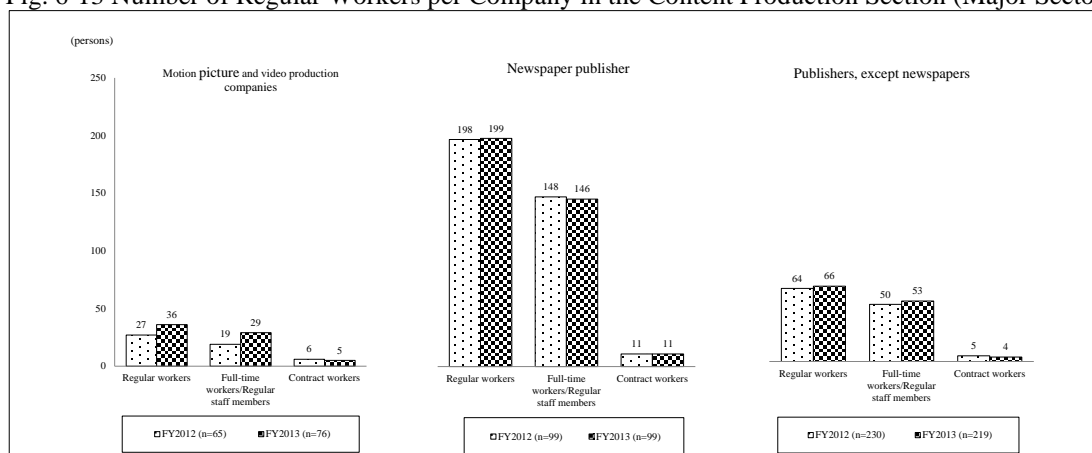
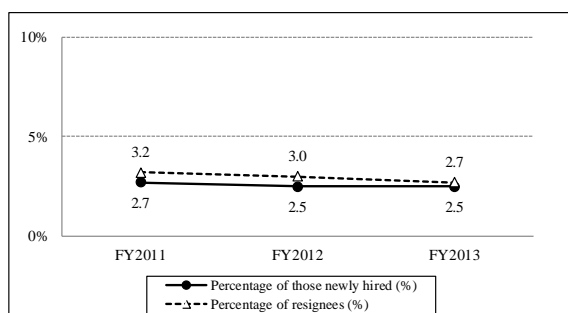
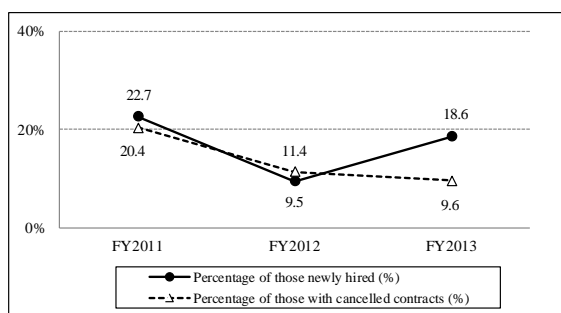


Fig. 6-14 Rate of Those Newly Hired and Resignees for Full-Time Workers/Regular Staff Members



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

Fig. 6-15 Rate of Contract Workers Newly Hired and Contract Cancellation for Contract Workers

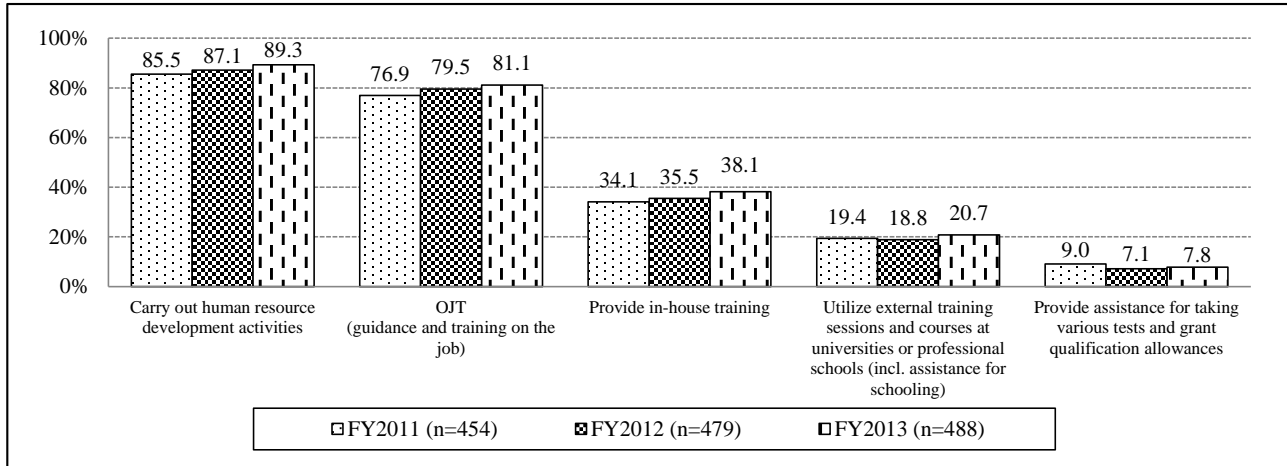


(Notes) Percentage of those newly hired = Number of those newly hired / (Number of contract workers + Number of those with cancelled contracts) × 100
 Percentage of those with cancelled contracts = Number of those with cancelled contracts / (Number of contract workers + Number of those with cancelled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

7. Human resource development in the content production section

- The percentage of companies that carried out human resource development activities accounted for 89.3% (up 2.2 points). Of them, 81.1% provided OJT (guidance and training on the job) (up 1.6 points).

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



2014 Basic Survey on the Information and Communications Industry (I) (Common Survey)

(As of March 31, 2014)

- ☆ 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, 2014, for this survey and **enter the settlement results for fiscal 2013. 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, 2014**.

1 Company Profile

| | | | | | | | | | | | | | | | | | |
|--|--|--|--|---|--|--|-----------------------|--|--|----------|--|--|---------|--|--|--|--|
| (1) Company name | | | | | | | Phone no. (Main line) | | | | | | | | | | |
| (2) Address of company head office (location where actual head office functions are performed) | Zip code (—) Prefecture City Ward (Name of building) | | | | | | | | | | | | | | | | |
| (3) Capital or investment amount (as of March 31, 2014) | 0101 | million yen | Enter the ratio of foreign capital to your company's overall capital. | Ratio of foreign capital (Enter up to the first decimal place) | | | | | | | | | | | | | |
| | | | | 0102 | | | | | | % | | | | | | | |
| (4) Form and year of company establishment | 0103 | Year of establishment (in four digits) | Circle the applicable number for the form of establishment, only if you are submitting the survey form for the first time 1. Newly established 2. Newly merged 3. Newly separated 4. Other | | | | | | | | | | | | | | |
| (5) Organizational restructuring status after April 2013 | 0104 | (i) Circle the applicable number regarding the organizational restructuring after April 2013. 1. Conducted ⇒ Enter (ii) 2. Not conducted ⇒ Go to (6) | | (ii) Circle all the applicable numbers regarding the content of the organizational restructuring, only if your company was reorganized after April 2013. 1. Merger 2. Spin-off 3. Selling out a part of businesses/assets to another company (business transfer) 4. Purchasing a part of businesses/assets from another company (business acceptance) 5. Other | | | | | | | | | | | | | |
| (6) Month of settlement | 0105 | Annual | | (month) | | | Biannual | | | (month), | | | (month) | | | | |
| (7) Consumption tax status (Check box if applicable) | 0106 | Tax excluded <input type="checkbox"/> | ※ In principle, please enter figures that include consumption tax. However, if it is difficult to provide tax-inclusive figures due to accounting reasons, check box and enter tax-exclusive figures. | | | | | | | | | | | | | | |

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

2 Business Organization and Number of Workers

2014 Survey

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

(As of the end of FY2013)

| 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 | |

(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.

| 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 | |

(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).

| Classification | | | Number of establishments | Number of regular workers |
|--|--|--|--------------------------|---------------------------|
| Number of workers transferred to other companies, etc. ③ | | | 0216 | |

| Classification | | | Number of establishments | Number of regular workers |
|---|--|--|--------------------------|---------------------------|
| Grand total ①+②+③ | | | 0217 | |
| Full-time workers | | | 0218 | |
| Part-timers | | | 0219 | |
| Part-timers (in terms of working hours) | | | 0220 | |

(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

2014 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 FY2013)

| | | | | | |
|---|---|--|--|-----------------------------|--|
| 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 FY2013)

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

(FY2013)

(FY2013)

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

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

(Note 1) For definitions of subsidiaries and affiliates, see Notes 2 and 3 of (2).

(Note 2) "Spin-off (0323)" refers to cases where a company has separated a business or part of the organization and established it as a separate company (subsidiary or affiliate).

(Note 3) "Acquisition (0324)" refers to cases where voting rights have been acquired.

(Note 4) "Closure (0327)" refers to cases where a company has stopped a subsidiary's or an affiliate's business activities and has not kept them running.

(Note 5) "Integration (0328)" refers to cases of merger among subsidiaries and affiliates.

(Note 6) "Sellout (0329)" refers to cases where voting rights have been assigned to other companies.

4 Assets, Liabilities, Net Assets and Investment

2014 Survey

(1) Assets, liabilities and net assets

(As of the end of FY2013)

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

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

(2) Investment in affiliates

(As of the end of FY2013)

| 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

(FY2013)

| 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 | | | | | | | | | | | | |
| Acquisition value of intangible fixed assets this term | 0443 | | | | | | Decrease in intangible fixed assets this term | 0445 | | | | | |

(4) Dividend status of surplus

(FY2013)

| Classification | | million yen | | | | |
|---|------|-------------|--|--|--|--|
| Dividends (including interim dividends) | 0451 | | | | | |

5 Business Performance

(1) Sales and expenses, etc.

(FY2013)

| 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 | | | | | | |
| Pretax profit (△ indicates a loss) | 0507 | | | | | | |
| Current net profit (△ indicates a loss) | 0508 | | | | | | |

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

(2) Breakdown of expenses

(FY2013)

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

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

(3) Information processing and communication expenses

(FY2013)

| 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

(FY2013)

| 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.

6 Business Conditions

2014 Survey

(1) Sales conditions

(FY2013)

| 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

(FY2013)

| 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

(FY2013)

| 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

(FY2013)

| 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

2014 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

(FY2013)

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

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

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

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

(FY2013)

| 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 FY2013)

| 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

(FY2013)

| 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

(FY2013)

| 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 1001

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.

1002

1. Yes

2. No

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

1003

Does your company employ stock options?

1. Yes

2. No



2014 Basic Survey on the Information and Communications Industry (II)

(Telecommunications and Broadcasting)

(As of March 31, 2014)

- ☆ 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, 2014, for this survey and **enter the settlement results for fiscal 2013. 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, 2014.**

1 Company Profile

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

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

2 Business Performance

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

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

3 Financial Status

(1) Fund procurement and fund management

Enter the status of procurement and management of long-term funds, on the basis of the net increase or decrease by category (see "Guide for Completing the Survey for 2014 Basic Survey on the Information and Communications Industry (II) (Telecommunications and Broadcasting)").

<On the whole-company basis>

| Category | | FY2013 Performance | | | | | | FY2014 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 FY2013 | | | | | | | | |

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

| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| Total forecast sales in the telecommunications business for FY2014 | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|

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 FY2013 | | | | | | | | |

(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 FY2014 | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|

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 FY2013 | | | | | | | | |

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

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

| | | million yen | | | | | | | |
|---|--|-------------|--|--|--|--|--|--|--|
| Total forecast sales in the cable television broadcasting business for FY2014 | | | | | | | | | |

(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

<FY2013>

| 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

<FY2013>

| 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

<FY2013>

| 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 | FY2013 Performance | | | | | | FY2014 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 | FY2013 Performance | | | | | | FY2014 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 | FY2013 Performance | | | | | | FY2014 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 FY2013 >

(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 |
|--|--|--|-------------|--|----------------------------|--------------------|
| 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 FY2013 ⇒ Enter (2)
 2. Did not implement outsourcing ⇒ Go to 7

② Broadcasting business

1. Implemented outsourcing in FY2013 ⇒ Enter (2)
 2. Did not implement outsourcing ⇒ Go to 7

③ Cable television broadcasting business

1. Implemented outsourcing in FY2013 ⇒ 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

<FY2013>

| 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

<FY2013>

| 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

<FY2013>

| 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 services incidental to internet |
| 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) <div style="border: 1px solid black; height: 100px; width: 100%;"></div> |
| 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) | 39 | No future business operation planned |
| 22 | Electronic authentication services | | |

General
Statistics

2014 Basic Survey on the Information and Communications Industry (III)

(Broadcast Program Production)

(As of March 31, 2014)

- ☆ 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, 2014, for this survey and **enter the settlement results for fiscal 2013. 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, 2014.**

1 Company Profile

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

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

2 Business Performance

(1) Broadcast media for programs that your company produces

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

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

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

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

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

(Note 4) Including commercial messages.

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

(2) Types of programs that your company produces

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

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

(3) Contents of the program production business

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

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

(4) Other business details

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

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

3 Sales**(1) Sales from the program production business**

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

| Classification | FY2013 Performance | | | | | | FY2014 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 (FY2013 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 (FY2013 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 | FY2013 Performance | | | | | | FY2014 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 FY2013) | | | |
|------------------|--|--------------------------|--------|--------------------------|
| | Purchased | | Rental | |
| | unit | Digitalized ones unit | unit | Digitalized ones unit |
| VTRs | | | | |
| Cameras | | | | |
| Editing machines | | | | |

5 Workers

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

< As of the end of FY2013 >

(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 |
|-----------------------------|--|--|-------------|--|----------------------------|--------------------|
| | | | | | | |
| Program production business | | | | | | |

(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 FY2013 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 FY2013, 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 FY2013, 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 FY2013 | | | | |
|--|-------------------------|-----------------------------|----------------|-------------------|
| 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 FY2013.

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 FY2013?

| | |
|---|-------|
| 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 FY2013 ⇒ 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.

< FY2013 >

| 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 ⑪, 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 | Prevention of workers from leaving, and improvement of retention rate |
| 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.

(As of March 31, 2014)

- ## 1 Company Profile

| | |
|---|---|
| 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 |
| | <div>Phone no. (Area code) - (Ext.)</div> <div>Contact address (enter only if different from the address of the head office given above)</div> |
| 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 services incidental to internet 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 services incidental to internet services () | | | | | | | | |
| 12 | Total sales of services incidental to internet business in FY2013 | | | | | | | | |

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

(Note 2) "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.

(Note 3) "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 4) "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.

| | | | | | | | |
|---|-------------|--|--|--|--|--|--|
| | million yen | | | | | | |
| Total forecast sales for services incidental to internet business in FY2014 | | | | | | | |

3 Number of Registered Tenants and Customers

Enter the number of registered tenants and customers as of March 31, 2014.

< As of the end of FY2013 >

| | 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 services incidental to internet business.

| Category | FY2013 Performance | | | | | FY2014 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 services incidental to internet business.

1. Implemented outsourcing in FY2013 ⇒ Enter (2)
 2. Did not implement outsourcing ⇒ Go to 6

(2) Enter the amount of your company's outsourcing cost for your services incidental to internet business.

<FY2013>

| Category | Outsourcing cost | | | | | Affiliates | | | | |
|--|------------------|--|--|--|--|-------------|--|--|--|--|
| | million yen | | | | | million yen | | | | |
| Outsourcing for the services incidental to internet 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 services incidental to internet 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 FY2013.

| Services incidental to internet business | Number of workers (As of the end of FY2013) | Newly hired full-time workers and contract workers | | Resignees and those with cancelled contracts (FY2013) |
|---|--|---|---------------|---|
| | | (FY2013) | 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 services incidental to internet business section. (Multiple answers allowed)

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

8 Business Operation

Circle the applicable number regarding your company's business operation policy for your services incidental to internet 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)

- We are carrying out collaboration and are going to expand it.
- We are carrying out collaboration and are going to maintain the status quo.
- We are carrying out collaboration but are going to downsize it (incl. withdrawal).
- We are not carrying out collaboration, but are going to start doing so.
- We are not carrying out collaboration, but are now considering doing so.
- 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 FY2013 >

| | 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 services incidental to internet |
| 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 |
| 14 | IPTV services (Internet video delivery) | | (Enter business names) |
| 15 | Web information search services | | <div style="border: 1px solid black; height: 150px; width: 100%;"></div> |
| 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 |

General
Statistics

2014 Basic Survey on the Information and Communications Industry (V)

(Information Services)

(As of March 31, 2014)

- ☆ 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, 2014, for this survey and **enter the settlement results for fiscal 2013. 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, 2014.**

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 | | | | | | | % |
| Information services | 2007 | | | | | | | % |
| Market research, opinion survey and social survey services | 2008 | | | | | | | % |
| Miscellaneous data processing and information services | 2009 | | | | | | | % |
| Total sales of information service business in FY2013 | 2010 | | | | | | | % |

(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.

< FY2013 >

| 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%.

< FY2013 >

| | | Sales promotion expenses (incl. events) | Media advertising expenses | | | | | Other |
|-----------------------|------|---|----------------------------|----------------|--------------------------|-------------------|-----------------------|-------|
| | | | | TV commercials | Newspapers and magazines | Net advertisement | Transit 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 FY2013 >

| | | 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 FY2013 ⇒ 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.

<FY2013>

| 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).

<FY2013>

| | | 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 FY2013
2. Did not accept work from other companies

⇒
⇒

Enter ② and ③
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.

<FY2013>

| 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.

<FY2013>

| | | 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 FY2013.

(persons)

| Development and production section (incl. foreigners) | | Number of workers (As of the end of FY2013) | Newly hired full-time workers and contract workers | | Resignees and those with cancelled contracts (FY2013) |
|--|------|--|--|---------------|--|
| | | | (FY2013) | 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 FY2013) | Newly hired full-time workers and contract workers (FY2013) | Resignees and those with cancelled contracts (FY2013) |
|--|------|--|--|--|
| | | | | |
| Foreign full-time workers | 5308 | | | |
| 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 | 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) | 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.

<CY2013>

| 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 FY2013.

< FY2013 >

| | | |
|---------------------------|------|------------------------------|
| | | 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, 2014.

< As of the end of FY2013 >

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

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

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

5807

Yes

To some extent

Neutral

Not really

No

1

2

3

4

5

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

5808

Yes

To some extent

Neutral

Not really

No

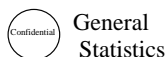
1

2

3

4

5



2014 Basic Survey on the Information and Communications Industry (VI)

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

(As of March 31, 2014)

- ☆ 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, 2014, for this survey and **enter the settlement results for fiscal 2013. 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, 2014.**

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 information, 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 information, sound information, character information production and distribution | 2009 | | | | | | | |
| | Total sales of video picture information, sound information, character information production and distribution business in FY2013 | 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 FY2013 >

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

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

4 Charge System

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

4001

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

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

5 Situation of the Content Production Section

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

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

(If you have sales from the "Content production section (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 FY2013.

Count all series with the same title as one.

< FY2013 >

| | | |
|-----------------------------|------|------------------------------|
| | | 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, 2014.

< As of the end of FY2013 >

| 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.

< FY2013 >

| 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%.

< FY2013 >

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

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

(4) Status of Businesses Outsourcing

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

- ☒ 5401 1. Implemented outsourcing in FY2013 ⇒ 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.

< FY2013 >

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

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

< FY2013 >

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

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

(5) Workers

Enter the number of workers engaged in your company's content production business. Also enter the total number of newly hired full-time workers, the number of new graduates among them, and the number of resignees; and the total number of newly hired contract workers, the number of new graduates among them, and the number of those with cancelled contracts in FY2013.

(person)

| Content production section | | Number of workers (As of the end of FY2013) | Newly hired full-time workers and contract workers | | Resignees and those with cancelled contracts (FY2013) |
|--|------|--|--|---------------|--|
| | | | (FY2013) | 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.

<CY2013>

| 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.

5901

Yes

To some extent

Neutral

Not really

No

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.

5902

Yes

To some extent

Neutral

Not really

No

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.

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 FY2013 >

| | Prefecture | Municipality | Zip code (7 digits) | Regular workers in the section |
|------|------------|--------------|---|--------------------------------|
| 6002 | | | <div><div>〒</div><div></div><div></div><div></div><div></div><div></div><div></div></div> | |
| 6003 | | | <div><div>〒</div><div></div><div></div><div></div><div></div><div></div><div></div></div> | |
| 6004 | | | <div><div>〒</div><div></div><div></div><div></div><div></div><div></div><div></div></div> | |
| 6005 | | | <div><div>〒</div><div></div><div></div><div></div><div></div><div></div><div></div></div> | |
| 6006 | | | <div><div>〒</div><div></div><div></div><div></div><div></div><div></div><div></div></div> | |