

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

2010 Survey (Performance in FY2009)

October 27, 2010

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Ministry of Internal Affairs and Communications
&
Research and Statistics Department,
Economic and Industrial Policy Bureau,
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 2010 Basic Survey on the Information and Communications Industry

Points

- The number of companies engaged in the information and communications business was 4,405, out of which 3,939 companies were operating this as their main business.
- The total sales of these 4,405 companies from the information and communications business were 38.6583 trillion yen. The total sales of 3,939 companies mainly engaged in this business were 35.5732 trillion yen.

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 4,405 and the total sales from the business were 38.6583 trillion yen (the total sales of these 4,405 companies were 47.2915 trillion yen) in FY2009. Sales were the largest for the telecommunications business, followed by the computer programming and other software services, and the data processing and information services. These three businesses accounted for over 70% of the total.

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

The number of companies rated as an information and communications company (meaning companies for which their sales from the information and communications business are rated as being the largest) was 3,939 and their total sales were 36.8445 trillion yen (sales from the information and communications business were 35.5732 trillion yen). The average of sales per company was 9.35 billion yen. Sales per company were largest for telecommunications companies, followed by newspaper publishers and other publishers. The average number of regular workers per company was 212, out of which 90% were full-time workers.

Chapter 2: Telecommunications and Broadcasting Business

The number of companies engaged in the telecommunications and broadcasting business was 994 and the total sales in FY2009 were 17.4478 trillion yen. By type of business, sales were 14.0895 trillion yen for the telecommunications business, 2.3913 trillion yen for the private broadcasting business, and 297.1 billion yen for the cable television broadcasting business.

Chapter 3: Broadcast Program Production Business

The number of companies engaged in the broadcast program production business was 305 and the total sales in FY2009 were 212.7 billion yen. Business operators with capital of less than 50 million yen accounted for 80% or more and those with less than 100 workers accounted for 90% or more.

Chapter 4: Internet Based Service Business

Companies engaged in the Internet based service business with capital of 100 million yen or more but less than 300 million yen accounted for 27.5%, and those with 5 to 9 workers accounted for 24.9%. Regarding companies that provided the percentage of their advertising revenue, the average amount of revenue per company was 1.06 billion yen, accounting for 60.5% of the total revenue.

Chapter 5: Information Service Business

Out of companies engaged in the information service business, 74.4% outsourced the work for their development and production section. The average of outsourcing cost per company was 0.98 billion yen, and 2.5% of the total was outsourced overseas, out of which 62.8% was outsourced to China. The average number of regular workers in the development and production section per company was 162, and the rate of those newly hired was higher than that of resignees (those with cancelled contracts) both for full-time workers and contract workers.

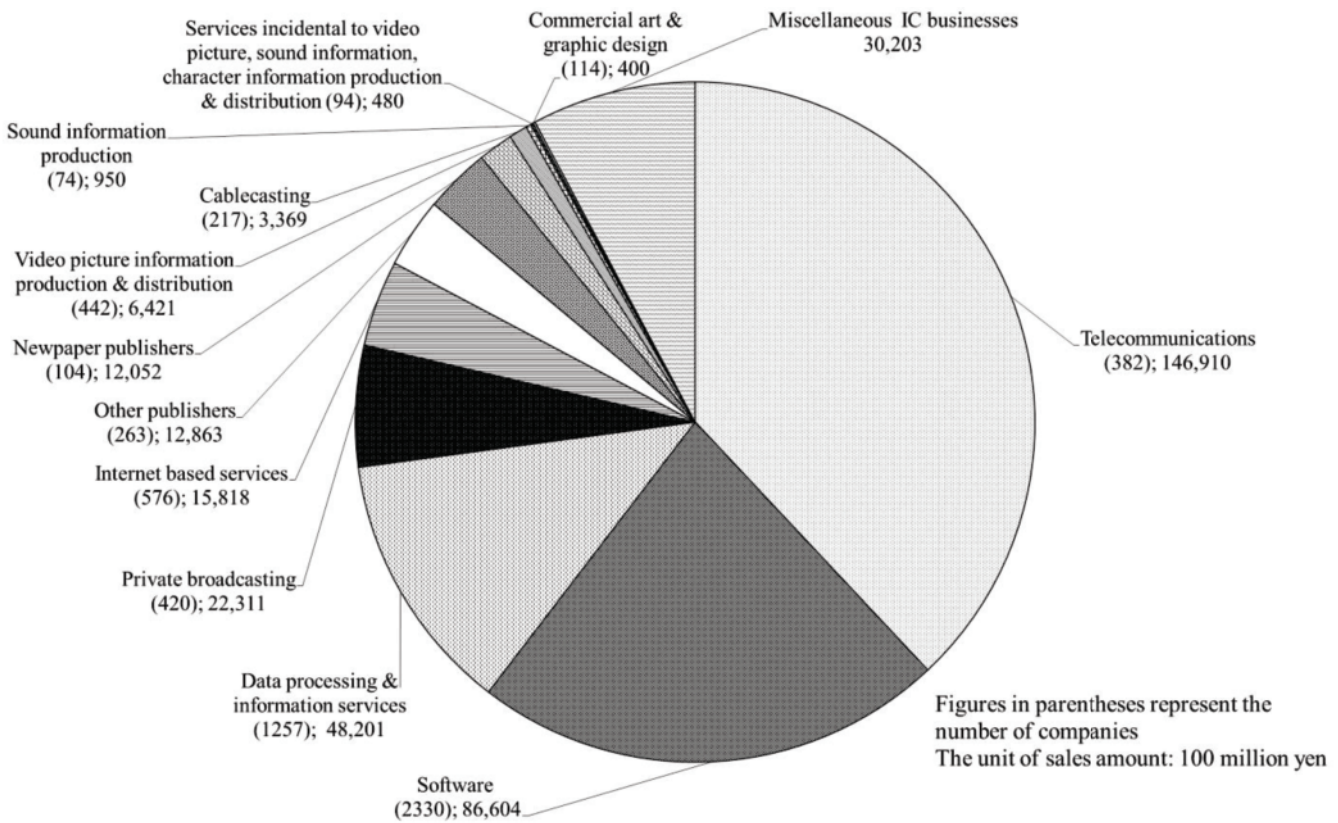
Chapter 6: Video Picture, Sound Information, Character Information Production and Distribution Business

In the development and production section of the video picture, sound information, character information production and distribution business, the average number of regular workers per company was 118, out of which 75.1% were full-time workers and 18.1% were contract workers. 89.3% of companies replied that they were carrying out human resource development activities.

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

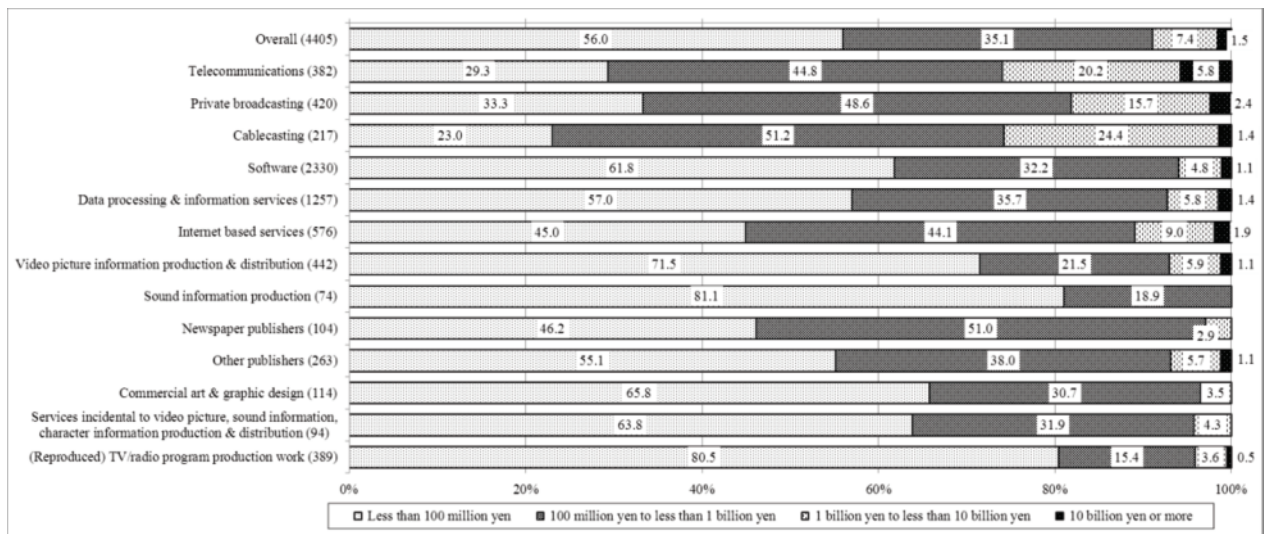
- The total number of companies engaged in the information and communications business (meaning companies that engage in this business, whether as their main business or not) was 4,405 and the total sales from the business were 38.6583 trillion yen (the total sales of these 4,405 companies were 47.2915 trillion yen) in FY2009. Sales were the largest for the telecommunications business, followed by the computer programming and other software services, and the data processing and information services. These three businesses accounted for 72.9% of the total.
- In seven out of 12 business types, companies with capital of less than 100 million yen accounted for 50% or more of the total. In all 12 business types, over 50% of companies also operated other businesses concurrently, and in particular, 94.5% of companies engaged in the cablecasting business were engaged in side-businesses as well.

Sales of the Information and Communications Industry

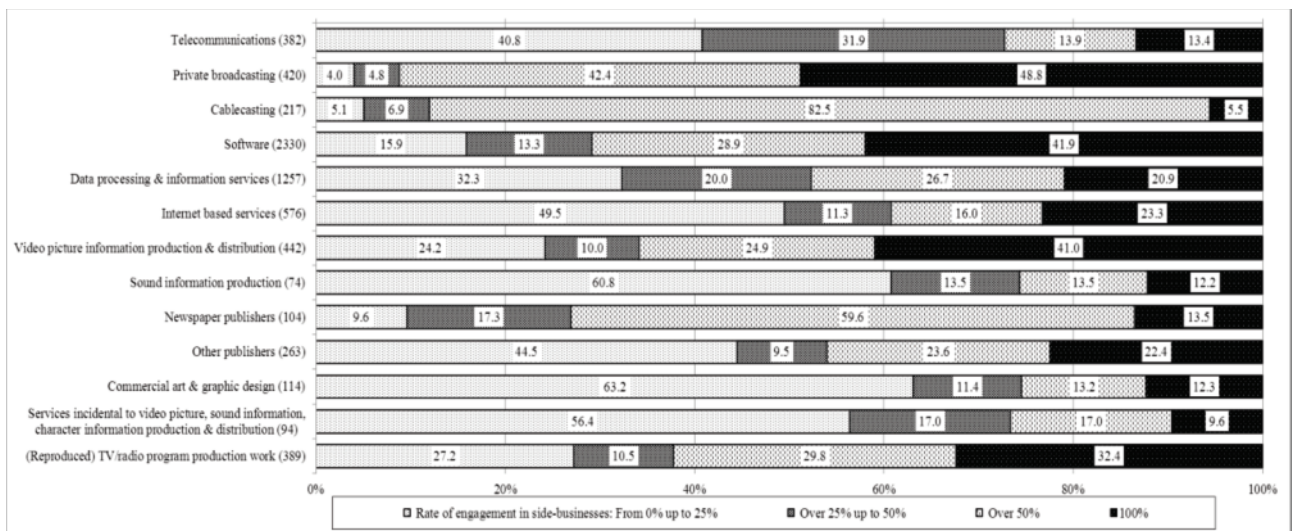


Composition Ratios of Companies

By capital size



By rate of engagement in side-businesses



Points of Chapter 1, Section 2:

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

- The number of companies rated as an information and communications company (meaning companies for which their sales from the information and communications business are rated as being the largest) was 3,939 and their total sales were 36.8445 trillion yen in FY2009.
- The average of sales per company was 9.35 billion yen. Sales per company were largest for telecommunications companies, followed by newspaper publishers and other publishers.
- The average ordinary profit per company was 0.71 billion yen. The amount of total assets was 11.63 billion yen, while that of net assets was 6.23 billion yen.
- The total number of regular workers working for information and communications companies was 833,800, and the average number of regular workers per company was 212, out of which 90% were full-time workers.

Number of Companies and Sales

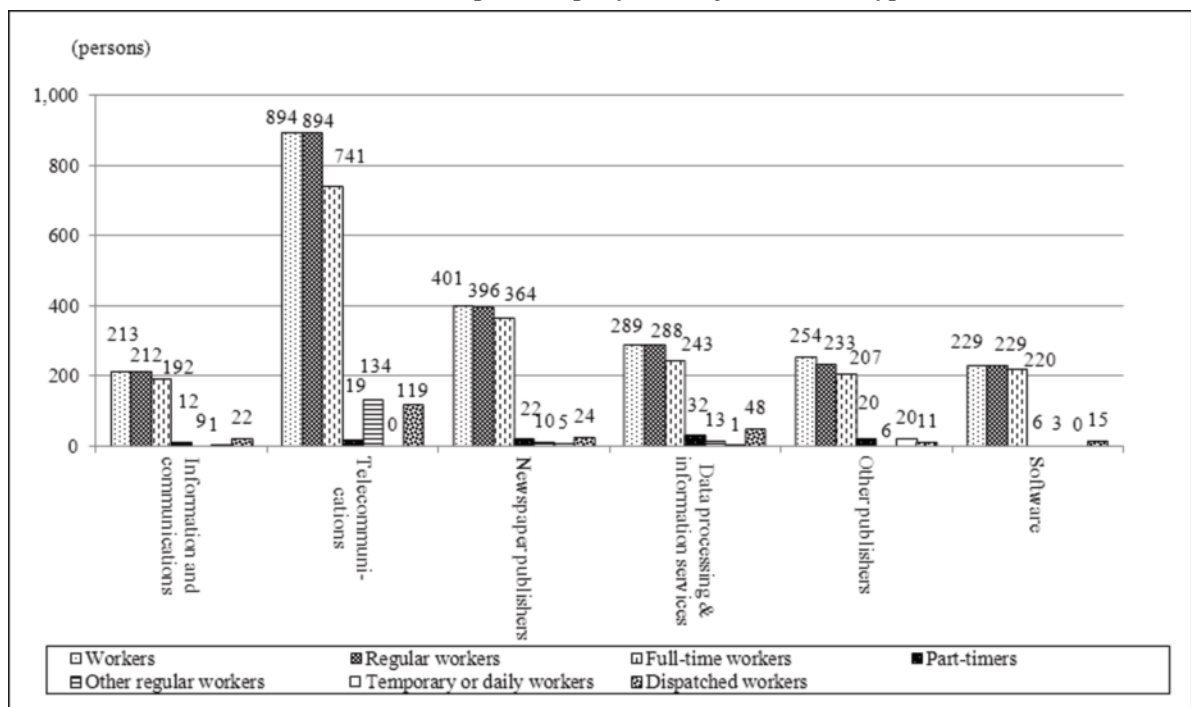
(Unit: companies, million yen, %)

	Number of companies		Sales					Sales per company	Sales from the information and communications business
		Composition ratio %		Composition ratio %	Sales from the information and communications business	Composition ratio %	Percentage among total sales (%)		
Total	4,405	100.0	47,291,525	100.0	38,658,326	100.0	81.7	10,735.9	8,776.0
IC companies	3,939	89.4	36,844,513	77.9	35,573,207	92.0	96.5	9,353.8	9,031.0
Telecommunications	91	2.1	16,291,129	34.4	16,186,655	41.9	99.4	179,023.4	177,875.3
Private broadcasting	389	8.8	2,485,406	5.3	2,398,382	6.2	96.5	6,389.2	6,165.5
Cablecasting	195	4.4	466,110	1.0	463,414	1.2	99.4	2,390.3	2,376.5
Software	1,744	39.6	7,748,270	16.4	7,236,929	18.7	93.4	4,442.8	4,149.6
Data processing & information services	680	15.4	5,115,618	10.8	4,861,249	12.6	95.0	7,523.0	7,148.9
Internet based services	236	5.4	1,197,133	2.5	1,146,715	3.0	95.8	5,072.6	4,859.0
Video picture information production & distribution	302	6.9	585,689	1.2	515,517	1.3	88.0	1,939.4	1,707.0
TV program production	236	5.4	282,408	0.6	270,646	0.7	95.8	1,196.6	1,146.8
Sound information production	23	0.5	107,225	0.2	107,128	0.3	99.9	4,662.0	4,657.7
Radio program production	18	0.4	1,847	0.0	1,750	0.0	94.7	102.6	97.2
Newspaper publishers	84	1.9	1,367,693	2.9	1,223,184	3.2	89.4	16,282.1	14,561.7
Other publishers	126	2.9	1,386,019	2.9	1,344,188	3.5	97.0	11,000.2	10,668.2
Commercial art & graphic design	37	0.8	49,638	0.1	48,415	0.1	97.5	1,341.6	1,308.5
Services incidental to video picture, sound information, character information production & distribution	32	0.7	44,583	0.1	41,431	0.1	92.9	1,393.2	1,294.7
Manufacturing companies	63	1.4	4,448,748	9.4	1,610,404	4.2	36.2	70,615.0	25,562.0
Wholesalers & retailers	127	2.9	1,911,093	4.0	386,015	1.0	20.2	15,048.0	3,039.5
Service companies	95	2.2	551,306	1.2	86,063	0.2	15.6	5,803.2	905.9
Other	181	4.1	3,535,865	7.5	1,002,637	2.6	28.4	19,535.2	5,539.4

Profits and Assets per Company for Major Business Types

	Number of companies	Ordinary profit (million yen)	Total assets (Total capital) (million yen)	Net assets (Own capital) (million yen)	Ratio of ordinary profit to sales (%)	Return on assets (ROA) (%)	Turnover of total capital (times)	Capital adequacy ratio (%)	Financial leverage (fold)
Total	4,405	725.7	12,605.0	6,319.2	6.8	5.8	0.85	50.1	2.0
IC companies	3,939	706.7	11,633.2	6,231.1	7.6	6.1	0.80	53.6	1.9
Telecommunications	91	18,276.6	277,494.2	144,443.5	10.2	6.6	0.65	52.1	1.9
Private broadcasting	389	215.8	8,729.4	6,330.8	3.4	2.5	0.73	72.5	1.4
Software	1,744	243.4	3,352.2	1,643.3	5.5	7.3	1.33	49.0	2.0
Data processing & information services	680	488.5	6,732.5	3,352.3	6.5	7.3	1.12	49.8	2.0
Internet based services	236	424.5	5,197.0	2,880.0	8.4	8.2	0.98	55.4	1.8

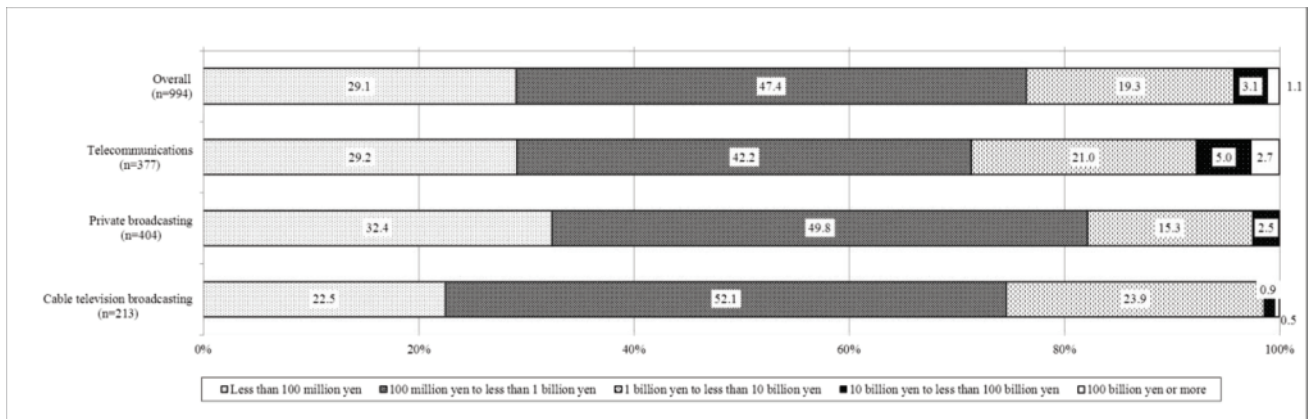
Number of Workers per Company for Major Business Types



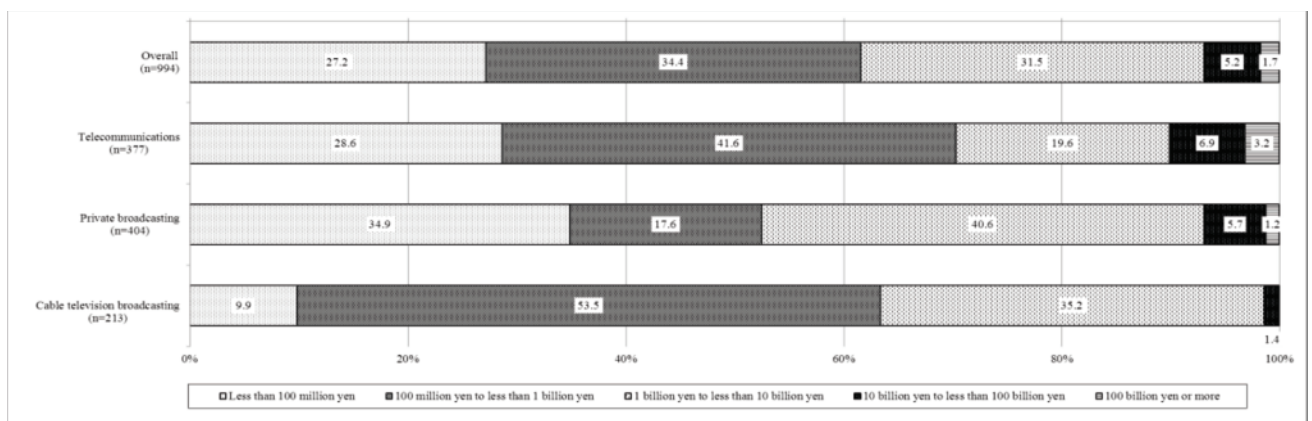
Points of Chapter 2: Telecommunications and Broadcasting

- The number of companies engaged in the telecommunications and broadcasting business was 994. Compositions of business operators are as shown below, with a variety of company sizes. By capital size, business operators with capital of 100 million yen or more but less than 1 billion yen were the largest in number, accounting for 47.4% of the total, followed by those with capital of less than 100 million yen (29.1%). By sales, those with sales of 100 million yen or more but less than 1 billion yen and those with sales of 1 billion yen or more but less than 10 billion yen accounted for nearly 30% (34.4% and 31.5%), respectively. By the number of workers, business operators with one to 29 workers accounted for 63.2%, followed by those with 30 to 99 workers (20.6%).
- The total sales in FY2009 were 17.4478 trillion yen. By type of business, sales were 14.0895 trillion yen for the telecommunications business, 2.3913 trillion yen for the private broadcasting business, and 297.1 billion yen for the cable television broadcasting business.

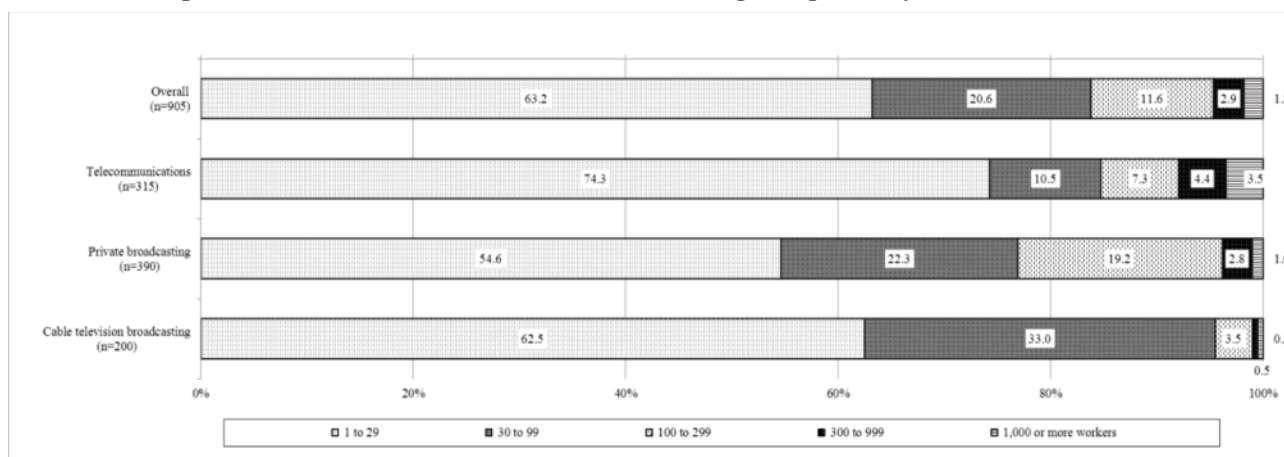
Composition of Telecommunications and Broadcasting Companies by Capital Size



Composition of Telecommunications and Broadcasting Companies by Sales



Composition of Telecommunications and Broadcasting Companies by Number of Workers



Sales by Business Type

(Unit: companies, 100 million yen, % (Upper: sales Lower: percentage))

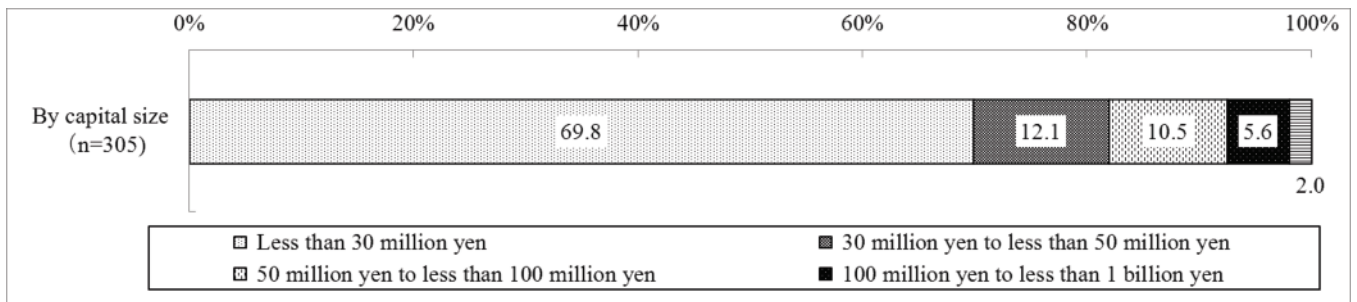
Classification	FY2009	
	Number of companies	Sales
Overall	995	174,478 100.0%
Telecommunications	377	140,895 80.8%
Broadcasting	618	33,583 19.2%
Private broadcasting	404	23,913 13.7%
Cable television broadcasting	213	2,971 1.7%
NHK	1	6,699 3.8%

* Data for NHK are based on publicized materials.

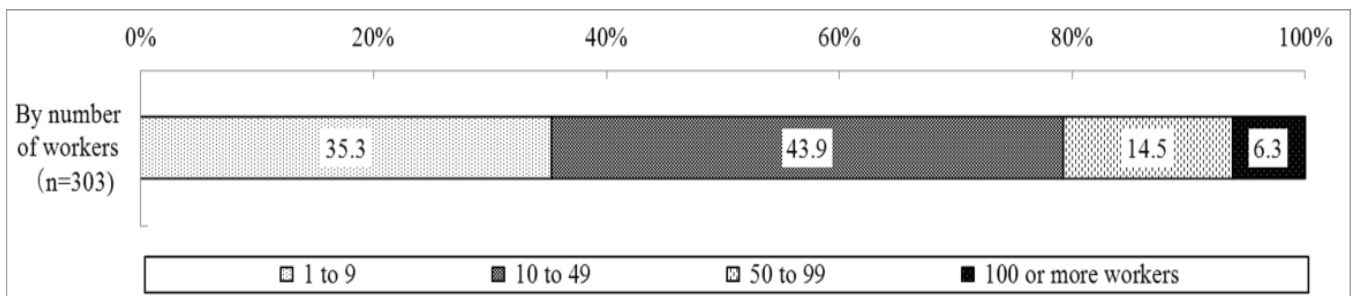
Points of Chapter 3: Broadcast Program Production

- The number of companies engaged in the broadcast program production business was 305, out of which 82.0% were business operators with capital of less than 50 million yen and 93.7% were those with less than 100 workers. Most of the companies engaged in this business are small and medium-sized.
- The total sales in FY2009 were 212.7 billion yen and the average of sales per company was 700 million yen.
- As management problems, 80.6% cited low unit prices of orders and 78.7% cited the need to stabilize orders.

Composition of Broadcast Program Production Companies by Capital Size



Composition of Broadcast Program Production Companies by Number of Workers

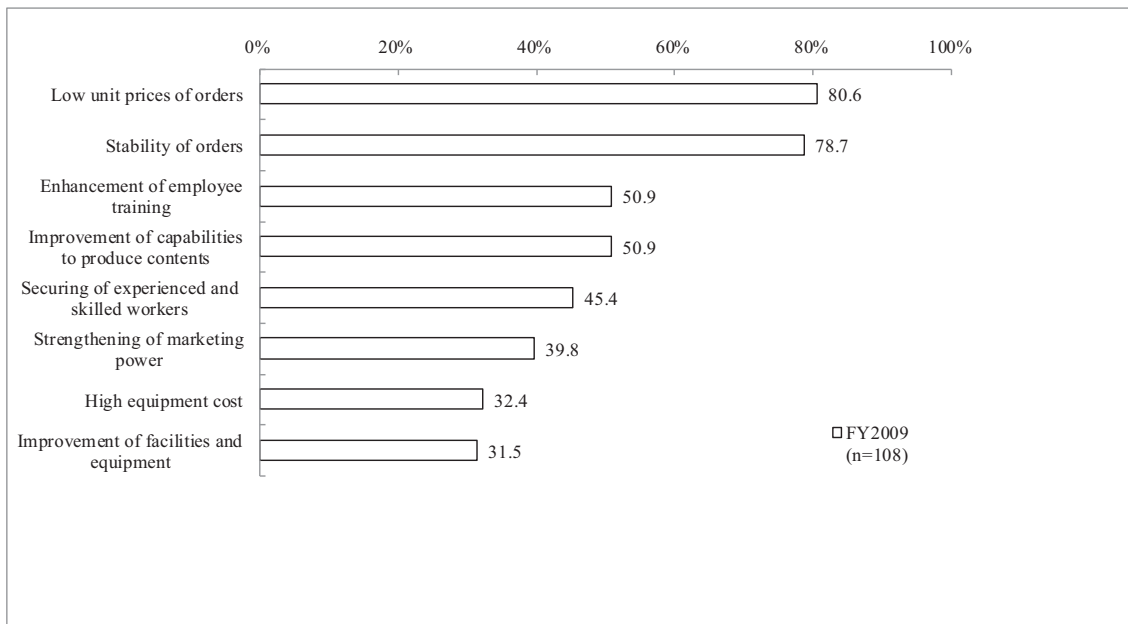


Sales of the Broadcast Program Production Business

(Unit: companies, million yen)

	Sales in FY2009		
	Number of companies	Sales	Per company
Overall	305	212,672	697
[Capital size]			
Less than 50 million yen	250	105,026	420
50 million yen or more	55	107,646	1,957

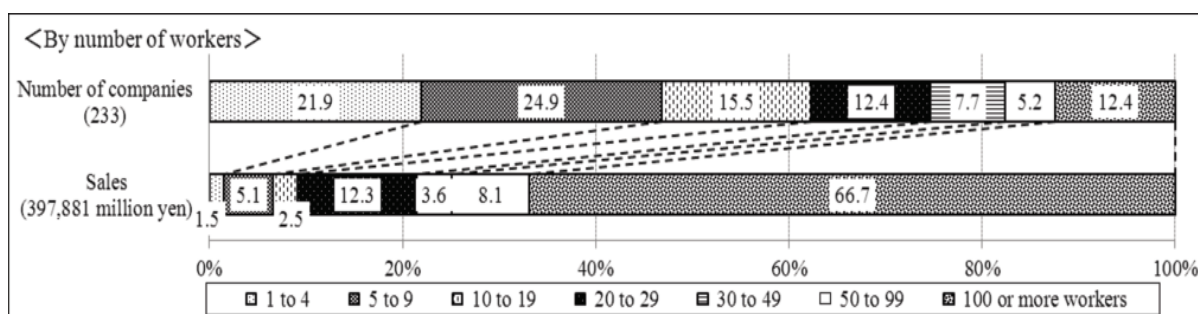
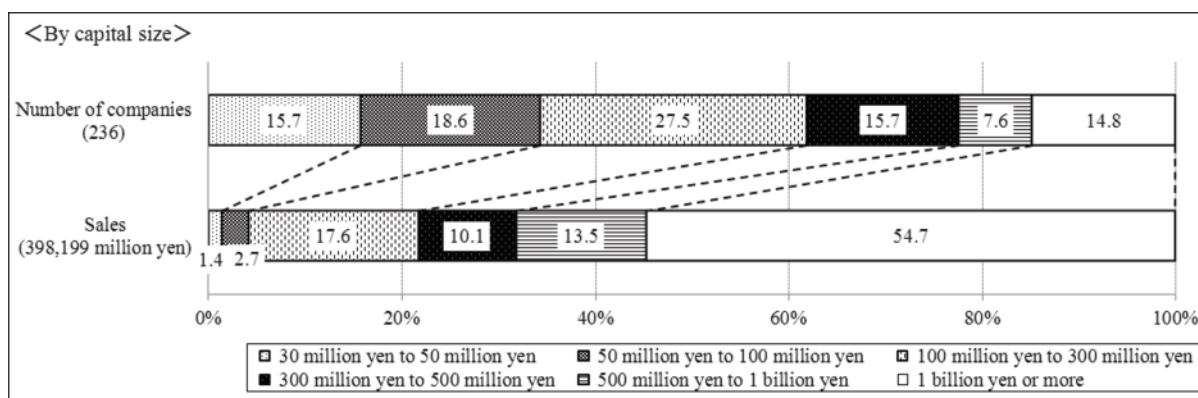
Major Management Problems



Points of Chapter 4: Internet Based Services

- Companies engaged in the Internet based service business with capital of 100 million yen or more but less than 300 million yen accounted for 27.5%, and those with 5 to 9 workers accounted for 24.9%.
- Regarding companies that provided the percentage of their advertising revenue, the sales per company were 1.75 billion yen and the amount of advertising revenue per company was 1.06 billion yen, on average, which accounted for 60.5% of the total revenue. In particular, advertising revenue accounted for 90.6% for the electronic bulletin board service, blog service, and SNS operation service business.
- Companies that implemented outsourcing accounted for 61.0%.

Composition Ratios of the Number of Companies and Sales by Capital Size and Number of Workers



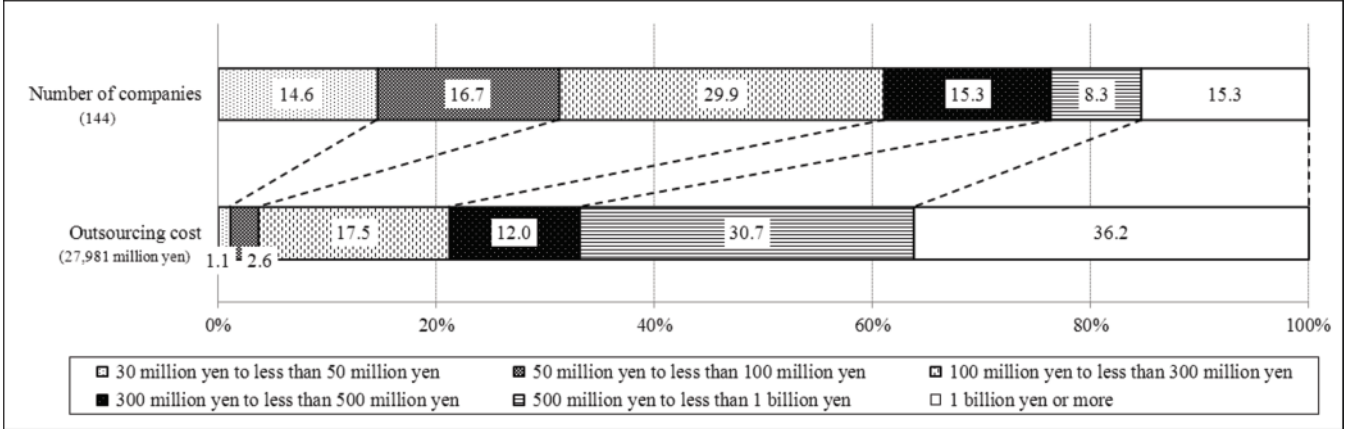
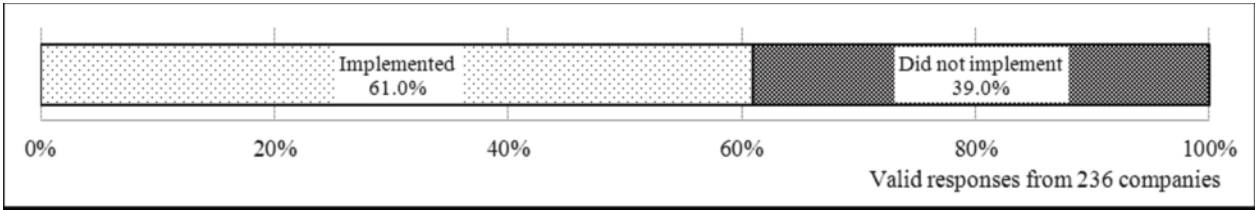
Advertising Revenue and Percentage of Advertising Revenue by Service Type

(Unit: million yen, %)

	Total	Web information search services	Internet shopping site operation services	Electronic bulletin board services, blog services, and SNS operation services	Web contents delivery services
Sales per company	1,754.7	243.7	389.0	7,669.0	1,440.7
Advertising revenue per company	1,060.8	199.6	50.3	6,948.6	100.7
Percentage of advertising revenue (%)	60.5	81.9	12.9	90.6	7.0

(Note) Sales per company and advertising revenue per company are based on data for companies that provided the percentage of their advertising revenue.

Outsourcing Status of Business



Points of Chapter 5: Information Services

- The average of sales per company was 3.41 billion yen, out of which 7.8% were from overseas.
- 74.4% of companies engaged in the information service business outsourced the work for their development and production section. The average of outsourcing cost per company was 0.98 billion yen, and 2.5% of the total was outsourced overseas, out of which 62.8% was outsourced to China.
- The average number of regular workers in the development and production section per company was 162, and the rate of those newly hired was higher than that of resignees (those with cancelled contracts) both for full-time workers and contract workers.

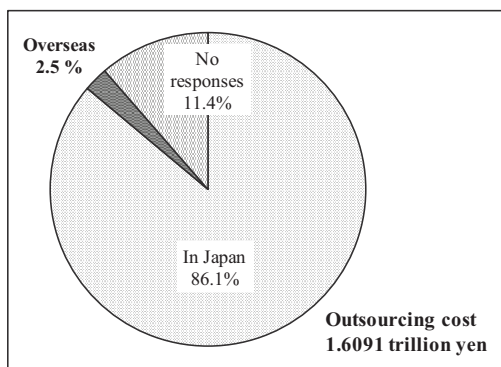
Number of Companies and Sales by Business Type

(Unit: companies, million yen, %)

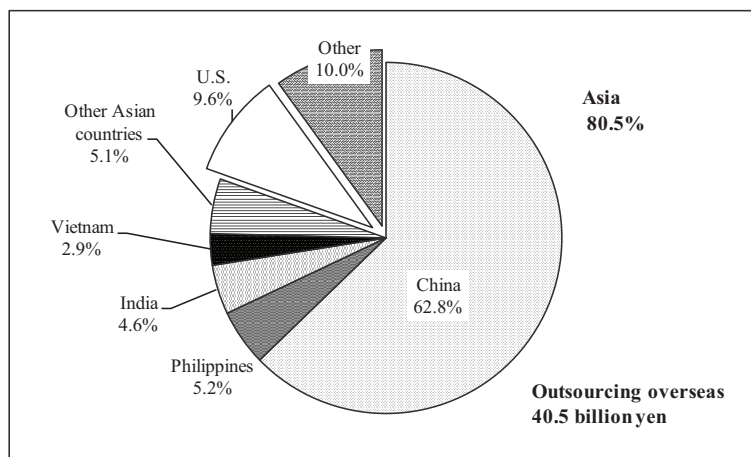
	Total								
	Composition ratio (%)	Custom software service companies	Embedded software service companies	Package software service companies	Game software service companies	Data processing service companies	Research & information service companies	Miscellaneous information service companies	
Number of companies	2,781	-	1,422	101	261	45	487	144	321
Composition ratio (%)	100.0	-	51.1	3.6	9.4	1.6	17.5	5.2	11.5
Sales	9,483,306	100.0	4,189,067	247,959	319,370	122,013	2,491,739	575,277	1,537,881
Composition ratio (%)	100.0	-	44.2	2.6	3.4	1.3	26.3	6.1	16.2
Activities	Custom software services (1,906)	43.4	3,346,425	28,081	24,713	2,171	412,409	135,828	170,633
	Embedded software services (268)	3.0	66,434	203,318	817	230	9,469	44	1,657
	Package software services (638)	6.1	90,469	2,774	262,613	52	154,926	761	63,657
	Game software services (57)	1.3	205	791	50	119,075	502	133	114
	Data processing services (895)	23.9	431,434	2,886	13,003	2	1,802,026	824	15,704
	Research & information services (230)	4.8	25,762	129	3,973	299	8,317	418,515	864
	Miscellaneous services (767)	17.5	228,338	9,980	14,201	184	104,090	19,172	1,285,252
	Overseas (363)	-	450,629	18,371	18,523	12,185	119,630	20,956	98,372
Percentage (%)	7.8	-	10.8	7.4	5.8	10.0	4.8	3.6	6.4
Sales per company	3,410.0	-	2,945.9	2,455.0	1,223.6	2,711.4	5,116.5	3,995.0	4,790.9

(Note) Figures in parentheses represent the number of companies engaged in some way in the relevant service business.

Outsourcing Overseas by the Development and Production Section



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



Those Newly Hired and Resignees in the Development and Production Section

(Unit: persons, %)

	Full-time workers			Foreign full-time workers	
		Composition ratio (%)	Percentage of those newly hired and resignees (%)		Percentage of those newly hired and resignees (%)
Number of those newly hired	20,495	100.0	5.8	796	12.5
New graduates	13,966	68.1	3.9	-	-
Mid-career workers	6,529	31.9	1.8	-	-
Number of resignees	14,947	-	4.2	882	13.8
Number of full-time workers + Number of resignees	356,101	-	-	6,373	-

(Note) 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

Number of mid-career workers = Number of those newly hired - Number of new graduates who were newly hired

(Unit: persons, %)

	Contract workers			Foreign contract workers	
		Composition ratio (%)	Percentage of those newly hired and those with cancelled contracts (%)		Percentage of those newly hired and those with cancelled contracts (%)
Number of those newly hired	1,854	100.0	16.4	95	16.9
New graduates	103	5.6	0.9	-	-
Mid-career workers	1,751	94.4	15.4	-	-
Number of those with cancelled contracts	1,551	-	13.7	144	25.7
Number of contract workers + Number of those with cancelled contracts	11,334	-	-	561	-

(Note) 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

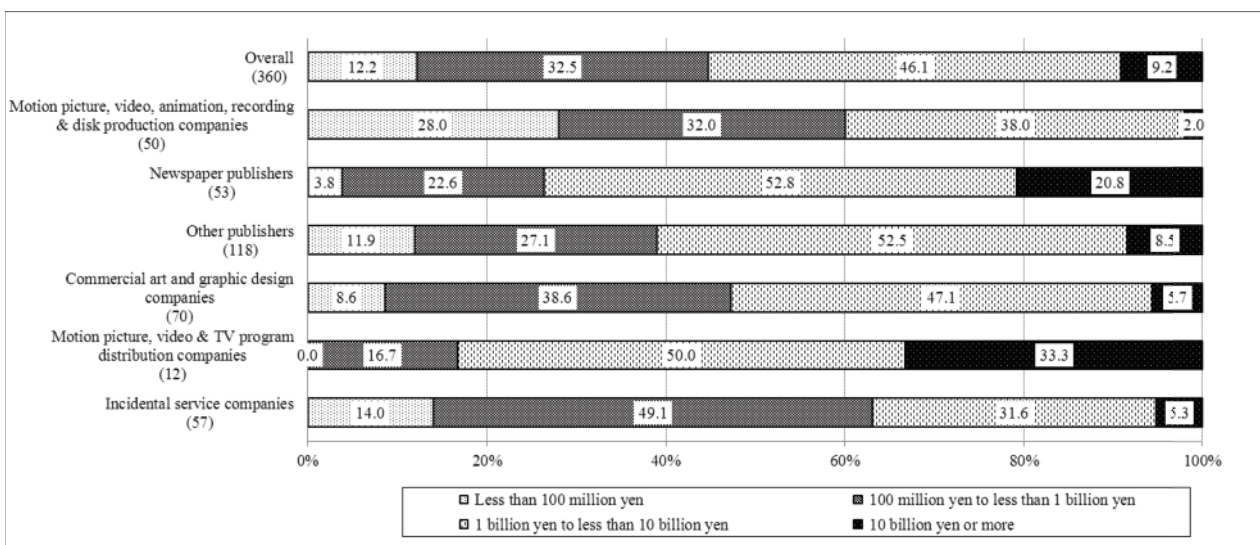
Number of mid-career workers = Number of those newly hired - Number of new graduates who were newly hired

Points of Chapter 6:

Video Picture, Sound Information, Character Information Production and Distribution

- By sales, the number of other publishers (i.e. those other than newspaper publishers) with sales of 1 billion yen to less than 10 billion yen accounted for 52.5%, while that of motion picture, video and television program distributors with sales of 10 billion yen or more accounted for 33.3% of the total.
- The average number of regular workers in the development and production section per company was 118, out of which 75.1% were full-time workers and 18.1% were contract workers. The rate of resignees (those with cancelled contracts) was higher than that of those newly hired both for full-time workers and contract workers.
- 89.3% of companies replied that they were carrying out human resource development activities.

Number of Companies by Sales



Those Newly Hired and Resignees in the Development and Production Section

(Unit: persons, %)

	Full-time workers		
		Composition ratio (%)	Percentage of those newly hired and resignees (%)
Number of those newly hired	564	100.0	2.6
New graduates	418	74.1	1.9
Mid-career workers	146	25.9	0.7
Number of resignees	766	-	3.5
Number of full-time workers + Number of resignees	21,964	-	-

(Note) 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

Number of mid-career workers = Number of those newly hired - Number of new graduates who were newly hired

(Unit: persons, %)

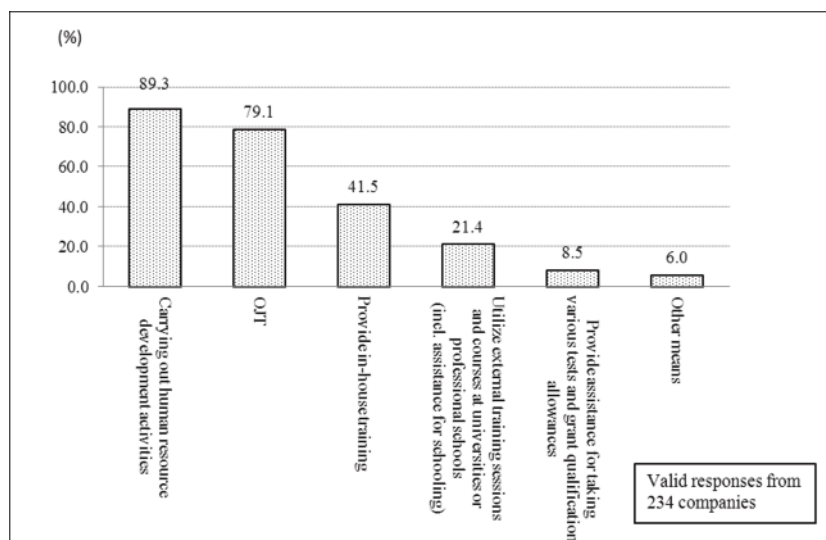
	Contract workers		
		Composition ratio (%)	Percentage of those newly hired and those with cancelled contracts (%)
Number of those newly hired	526	100.0	7.7
New graduates	178	33.8	2.6
Mid-career workers	348	66.2	5.1
Number of those with cancelled contracts	1,686	-	24.8
Number of contract workers + Number of those with cancelled contracts	6,807	-	-

(Note) 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

Number of mid-career workers = Number of those newly hired - Number of new graduates who were newly hired

Human Resource Development in the Development and Production Section



Notes on Use

The Ministry of Internal Affairs and Communications and the Ministry of Economy, Trade and Industry conducted the Basic Survey on the Information and Communications Industry as of March 31, 2010, and have compiled and published the results as a preliminary report. The outline of the survey and the notes for use of the statistical tables are as follows:

(Terms)

- "Regular workers" refer to paid directors and regularly employed people (people, regardless of their titles as full-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).
- "Full-time workers" refer to regular workers generally referred to as full-time workers.
- "Part-timers" refer to regular workers whose scheduled daily working hours or number of working days in a week are shorter than full-time workers.
- "Temporary or daily workers" refer to people who are employed for a period of up to one month, or those who are brought in on a daily basis. They are not included in regular workers.
- "Dispatched workers" refer to workers who are employed by a worker-dispatching business operator and are engaged in an accepting company's operations under its supervision and command, based on a contract between the accepting company and the worker-dispatching business operator, under the aforementioned employment relationship. They are not included in the total number of workers of the accepting company.
- "Workers" refer to the combination of "regular workers" and "temporary or daily workers."
- A "subsidiary" is a company in which a certain company (parent company) owns more than 50% of the voting rights. It includes a company in which the subsidiary, or the parent company and the subsidiary combined, own more than 50% of the voting rights (deemed subsidiary) and a company practically controlled by the subsidiary or jointly by the parent company and the subsidiary even in the case they own only 50% or less of the voting rights.
- An "affiliated company" is a company in which a certain company directly owns no less than 20% but no more than 50% of the voting rights.
- In this report, the "telecommunications business" shows data only for the communications business, and the "telecommunications and broadcasting business" shows the total of the telecommunications business and the broadcasting business.
- "(Reproduced) TV/radio program production work" indicates the total of TV program production work and radio program production work among the overall video picture, sound information, character information production and distribution work.

(Figures)

- In the tables, "-" means that there is no applicable number and "0" means that the figure is under the unit.

- All figures show the total of valid responses for each item.
- As figures and distribution ratios round off digits under the units, the aggregated amount does not necessarily match the total.
- The numbers of companies, establishments, workers, and subsidiaries are those at the end of FY2009 and sales are the performance of the entirety of FY2009.
- Breakdown data of the "number of regular workers" ("full-time workers" + "part-timers" + "dispatched workers") do not match the total. The difference includes the numbers of paid directors and contract workers, etc.

(Other)

- This preliminary report shows the results obtained from questionnaires collected as of the end of August 2010, and the final report compiled based on all valid responses will be publicized in March 2011.
- As only valid responses are counted, the number of companies that submitted a response varies by item. Furthermore, as each type of survey form was sent to and collected from different companies, the number of responding companies varies by Chapter even for the same type of business.
- Chapter 1 compiles the survey results regarding all companies engaged in the information and communications business, both from the viewpoint of companies' business activities (Results Based on Business Activities) and from the viewpoint of companies' main business (Results Based on Companies Rated as Mainly Engaged in the IC Business). The entirety of activity-based results matches the total on the basis of companies rated as mainly engaged in the information and communications business.
- Comparisons are made with the results of the "Basic Survey on the Communications and Broadcasting Industry (Ministry of Internal Affairs and Communications)" in Chapter 2, and with those of the "Survey on Television Program Production (Ministry of Internal Affairs and Communications)" in Chapter 3. However, as the other surveys started this year, year-on-year comparisons cannot be made.
- In Chapter 2, survey results are compiled by business type. Therefore, companies engaged in multiple businesses are included either in the total of the telecommunications and broadcasting business or in the broadcasting business.
- In Chapter 2 and Chapter 3, it should be noted that numbers of valid responses vary for each survey when making comparisons by year.
- In Chapter 6, data for the video picture, sound information, character information production and distribution work are compiled without those for the TV program production work and the radio program production work.
- The Japan Broadcasting Corporation (NHK) is not covered by this survey, but data for some related parts are cited from materials publicized by NHK ("Inventory, Balance Sheet, Profit and Loss Statement, Statement of Changes in Net Assets, Cash Flow Statement, and Written Explanations Thereof (NHK)" (for FY2007, "Inventory, Balance Sheet, Profit and Loss 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" 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.

(Collection)

Questionnaire type		Companies to which the questionnaire was sent	Companies that submitted a response	Response rate	Companies that gave a valid response
Questionnaire (I) (Common Survey)		8,907	5,817	65.3%	4,405
Survey on Items for Each Business Type	(II) (Telecommunications and Broadcasting)	1,401	867	61.9%	789
	(III) (Broadcast Program Production)	782	358	45.8%	305
	(IV) (Internet Based Service)	1,068	545	51.0%	236
	(V) (Information Service)	5,856	3,687	63.0%	2,781
	(VI) (Video Picture, Sound Information, Character Information Production and Distribution)	2,045	1,201	58.7%	360

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 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 4,405. The number of establishments was 16,319 and the number of workers was 1,126,311.
- The total sales from the business were 38.6583 trillion yen (the total sales of these 4,405 companies were 47.2915 trillion yen) in FY2009.
- The operating profit was 3.2708 trillion yen, while the ordinary profit was 3.1966 trillion yen. The number of subsidiaries and affiliated companies owned was 5,778.

Fig. 1-1-1 Overall Outline

	Number of companies	Number of establishments	Number of workers (persons)	Regular workers (persons)	Sales	Sales from the relevant business	Operating profit	Ordinary profit	Number of subsidiaries and affiliated companies
					(100 million yen)	(100 million yen)	(100 million yen)	(100 million yen)	
Overall	4,405	16,319	1,126,311	1,118,073	472,915	386,583	32,708	31,966	5,778
Telecommunications	382	1,867	161,029	160,658	190,628	146,910	18,567	18,238	680
Private broadcasting	420	1,376	45,891	45,141	57,932	22,311	5,507	5,080	433
Cablecasting	217	470	13,526	13,370	5,485	3,369	658	595	52
Software	2,330	7,498	635,046	634,551	160,324	86,604	7,305	7,234	2,675
Data processing & information services	1,257	5,451	460,704	458,206	123,884	48,201	5,407	5,494	1,855
Internet based services	576	2,070	148,127	147,415	63,243	15,818	5,806	5,274	928
Video picture information production & distribution	442	924	34,839	34,352	18,536	6,421	902	651	424
Sound information production	74	98	3,397	3,143	1,566	950	58	36	22
Newspaper publishers	104	1,495	36,918	36,475	14,694	12,052	30	258	575
Other publishers	263	2,354	103,336	99,537	39,573	12,863	1,177	1,318	695
Commercial art & graphic design	114	212	6,446	6,309	1,558	400	121	41	46
Services incidental to video picture, sound information, character information production & distribution	94	289	6,818	6,736	1,629	480	-16	-9	49
(Reproduced) TV/radio program production work	389	663	19,725	19,228	6,053	2,838	241	227	137

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

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

* Results based on activities

Chapter 1, Section 1 shows the survey results based on companies' activities. When a company is engaged in multiple businesses, data for the overall company (such as the number of establishments and the number of workers) are recorded for each business type. (For example, when a company is engaged in the telecommunications business and the information service business, the company's data are recorded both for the telecommunications business and the information service business in figures.)

Therefore, the sum of each business type does not match the overall total.

Survey results from the viewpoint of companies' main business are also prepared.

2. Sales

- The total sales from the information and communications industry were 38.6583 trillion yen.
- Sales were the largest for the telecommunications business, followed by the computer programming and other software services, and the data processing and information services. These 3 businesses accounted for 72.9% of the total.

Fig. 1-1-2 Sales of the Information and Communications Industry

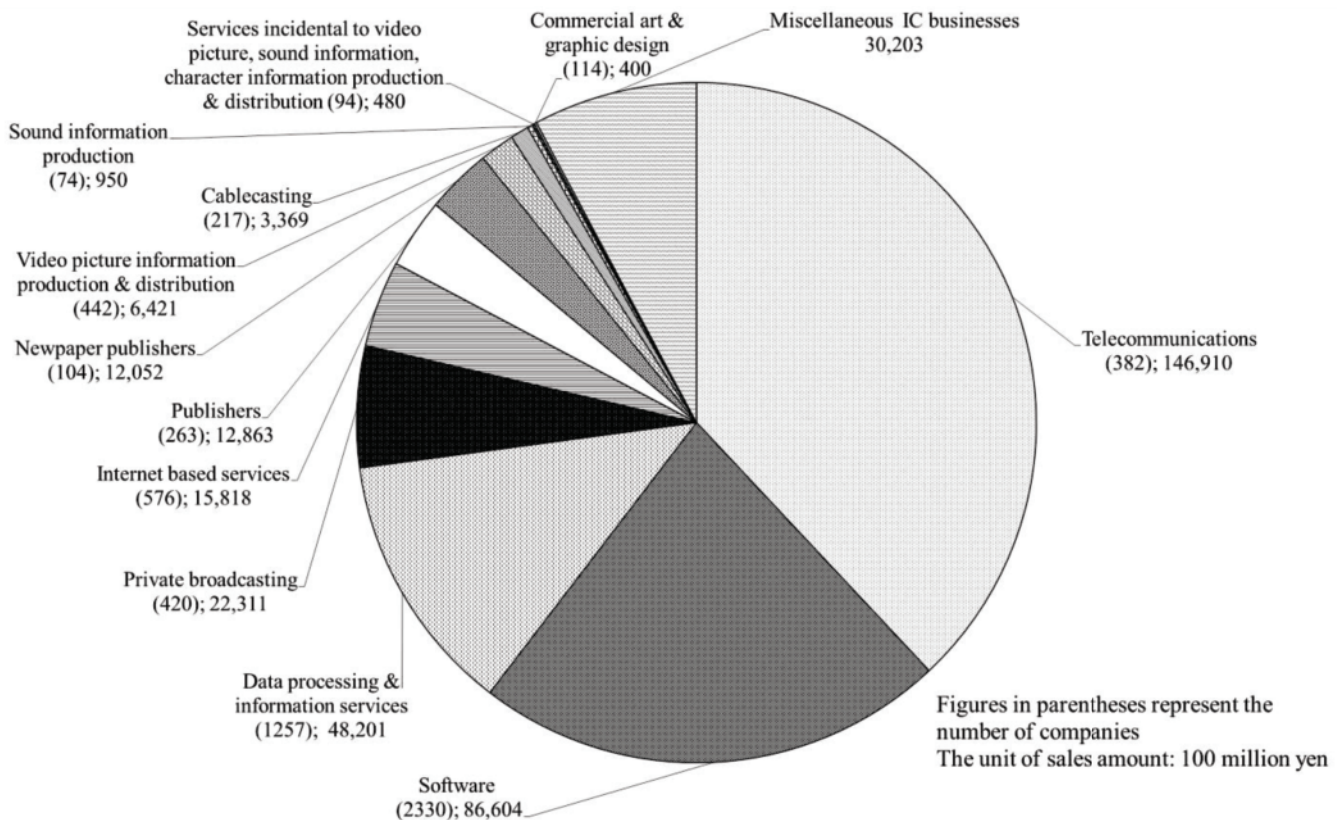


Fig. 1-1-3 Sales of the Information and Communications Industry

(Unit: 100 million yen)

	Overall	Telecommunications	Software	Data processing & information services	Private broadcasting	Internet based services	Other publishers	Newspaper publishers	Video picture information production & distribution	Cablecasting	Sound information production	Services incidental to video pictures, sound information character information production & distribution	Commercial art & graphic design	Miscellaneous information & communications business
Sales from the relevant business	(4405) 386,583	(382) 146,910	(2330) 86,604	(1257) 48,201	(420) 22,311	(576) 15,818	(263) 12,863	(104) 12,052	(442) 6,421	(217) 3,369	(74) 950	(94) 480	(114) 400	30,203

*"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.)

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

Composition ratios of the number of companies:

- By capital size, in 7 out of 12 business types, companies with capital of less than 100 million yen accounted for 50% or more of the total.
- By sales, in ten business types except for the private broadcasting business and the sound information production business, companies with sales of 100 million yen or more but less than 10 billion yen accounted for 70% or more of the total.
- By the number of workers, in 10 businesses except for the newspaper publishers and the other 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, over 50% of companies also operated other businesses concurrently, and in particular, 94.5% of companies engaged in the cablecasting business were engaged in side-businesses as well.

Fig. 1-1-4 Composition Ratios of Companies by Capital Size

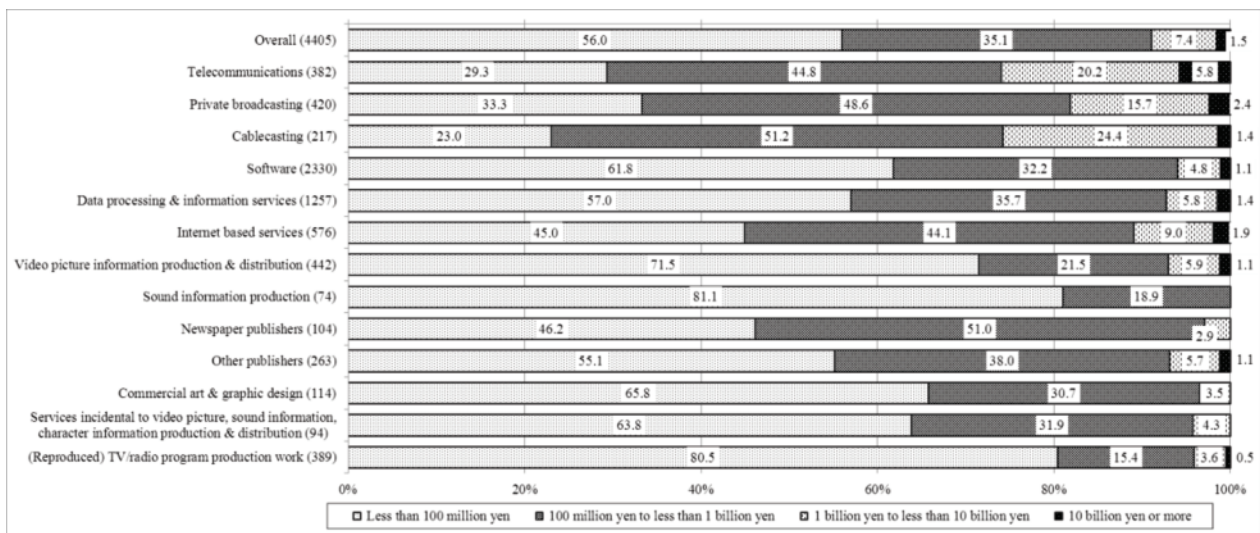


Fig. 1-1-5 Composition Ratios of Companies by Sales

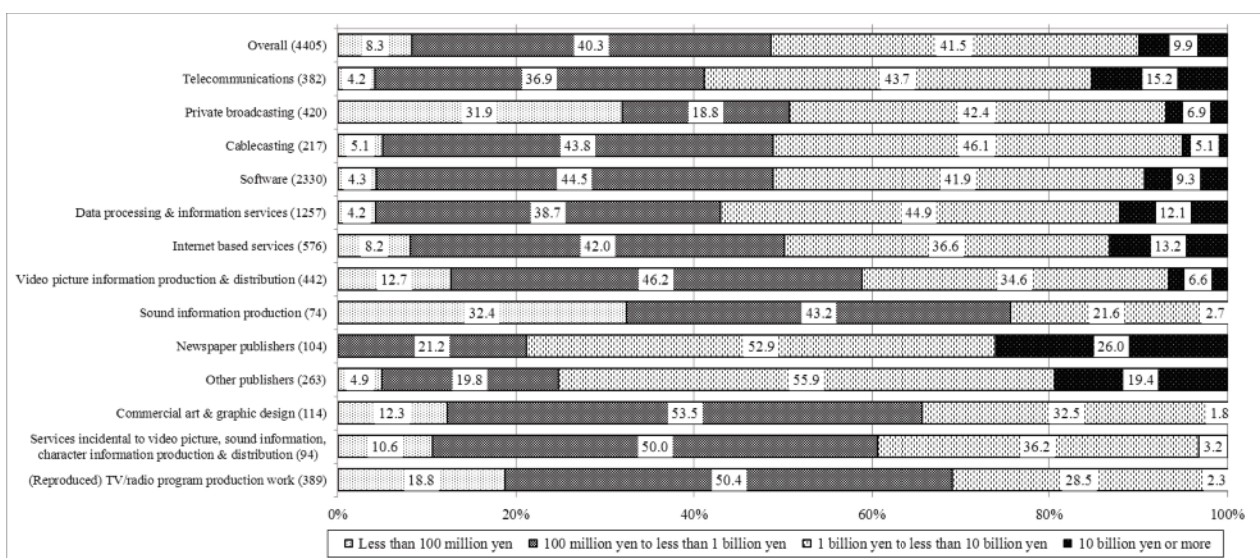


Fig. 1-1-6 Composition Ratios of Companies by Number of Workers

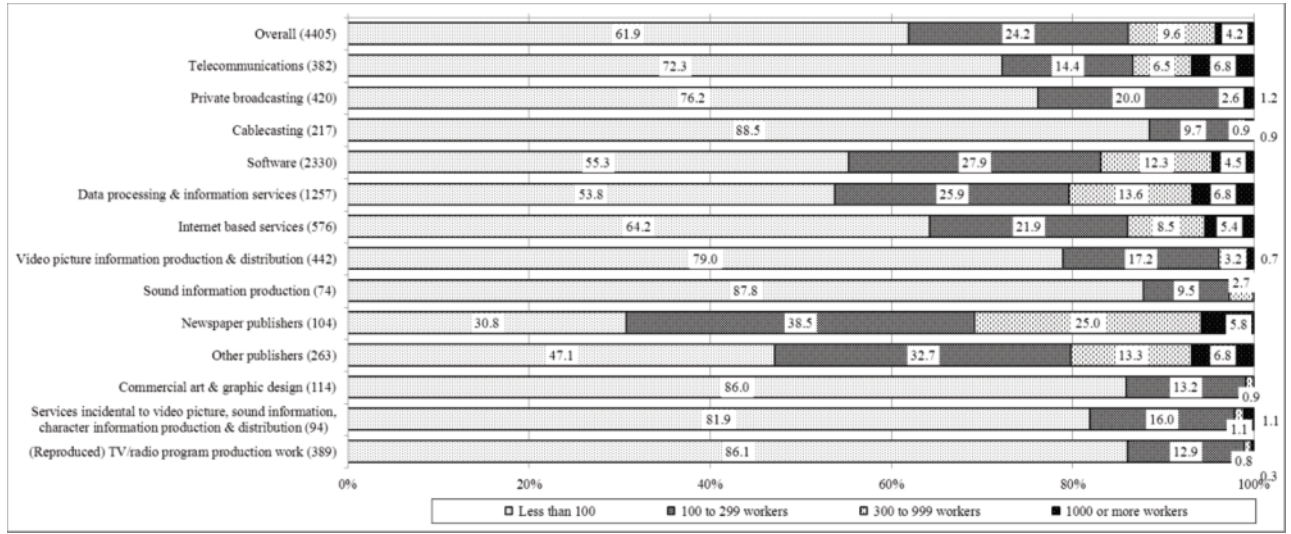
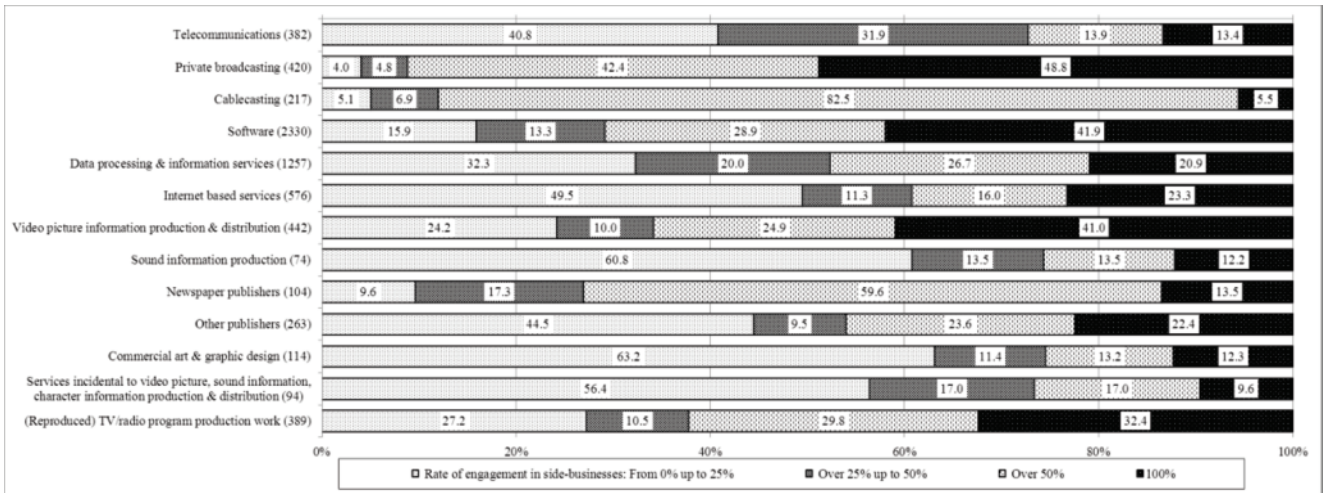


Fig. 1-1-7 Composition Ratios of Companies by Rate of Engagement in Side-Businesses



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

4. Profits and assets

- The average ordinary profit per company was 0.73 billion yen, and the total assets and the net assets were 12.61 billion yen and 6.32 billion yen, respectively.
- The average value added per company was 3.0 billion yen, and the value added ratio was 27.9%. The labor productivity was 11.725 million yen/person, the labor share was 45.5%, and the labor equipment ratio was 17.162 million yen/person.

Fig. 1-1-8 Profits and Assets per Company

	Number of companies	Ordinary profit (million yen)	Total assets (Total capital) (million yen)	Net assets (Own capital) (million yen)	Ratio of ordinary profit to sales (%)	Return on assets (ROA) (%)	Turnover of total capital (times)	Capital adequacy ratio (%)	Financial leverage (fold)
Overall	4,405	725.7	12,605.0	6,319.2	6.8	5.8	0.85	50.1	2.0
Telecommunications	382	4,774.5	74,103.5	37,032.1	9.6	6.4	0.67	50.0	2.0
Private broadcasting	420	1,209.4	17,398.5	10,805.3	8.8	7.0	0.79	62.1	1.6
Cablecasting	217	274.1	4,411.5	2,072.9	10.8	6.2	0.57	47.0	2.1
Software	2,330	310.5	5,673.8	2,473.6	4.5	5.5	1.21	43.6	2.3
Data processing & information services	1,257	437.1	8,422.2	3,611.2	4.4	5.2	1.17	42.9	2.3
Internet based services	576	915.7	11,107.4	5,763.6	8.3	8.2	0.99	51.9	1.9
Video picture information production & distribution	442	147.3	4,623.7	2,852.1	3.5	3.2	0.91	61.7	1.6
Sound information production	74	48.9	1,438.8	725.3	2.3	3.4	1.47	50.4	2.0
Newspaper publishers	104	247.7	17,420.4	8,768.3	1.8	1.4	0.81	50.3	2.0
Other publishers	263	501.2	16,088.6	9,096.0	3.3	3.1	0.94	56.5	1.8
Commercial art & graphic design	114	35.6	894.2	363.4	2.6	4.0	1.53	40.6	2.5
Services incidental to video picture, sound information, character information production & distribution	94	-9.1	1,586.6	769.5	-0.5	-0.6	1.09	48.5	2.1
(Reproduced) TV/radio program production work	389	58.4	1,449.2	825.4	3.8	4.0	1.07	57.0	1.8

Notes: Ratio of ordinary profit to sales = Ordinary profit / Sales × 100 (Productivity index to ascertain how much profit was obtained from the total sales)

Return on assets (ROA) = Ordinary profit / Total assets (total capital) × 100 (Productivity index to ascertain how much profit was obtained from the total capital invested)

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)

Financial leverage = Total assets (total capital) / Net assets (own capital) (Index to show how many times the amount of total capital is as large as the amount of own capital and thereby indicate the debt capital (liabilities))

Fig. 1-1-9 Added Value per Company

	Number of companies	Value added (million yen)	Value added ratio (%)	Labor productivity (10,000 yen/person)	Labor share (%)	Labor equipment ratio (10,000 yen/person)
Overall	4,405	2,998.0	27.9	1,172.5	45.5	1,716.2
Telecommunications	382	10,747.6	21.5	2,549.6	23.9	8,697.1
Private broadcasting	420	3,011.2	21.8	2,755.9	29.3	6,632.6
Cablecasting	217	906.7	35.9	1,454.7	25.1	3,857.7
Software	2,330	2,455.5	35.7	900.9	58.8	276.8
Data processing & information services	1,257	3,165.1	32.1	863.6	54.2	395.7
Internet based services	576	3,616.9	32.9	1,406.5	39.3	821.4
Video picture information production & distribution	442	1,057.9	25.2	1,342.2	50.2	1,727.6
Sound information production	74	364.8	17.2	794.8	60.1	413.5
Newspaper publishers	104	4,531.3	32.1	1,276.5	63.4	2,279.7
Other publishers	263	3,143.8	20.9	800.1	54.9	885.6
Commercial art & graphic design	114	470.5	34.4	832.1	55.1	488.1
Services incidental to video picture, sound information, character information production & distribution	94	592.7	34.2	817.1	70.9	744.3
(Reproduced) TV/radio program production work	389	458.9	29.5	904.9	59.5	836.9

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

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

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

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

5. Workers

- The number of workers was 1,126,311, out of which full-time workers were 973,369, accounting for 86.4% of the total. The number of part-timers was 98,567 and that of dispatched workers was 108,143.
- The average number of workers per company was 256, out of which 221 were full-time workers and 22 were part-timers.

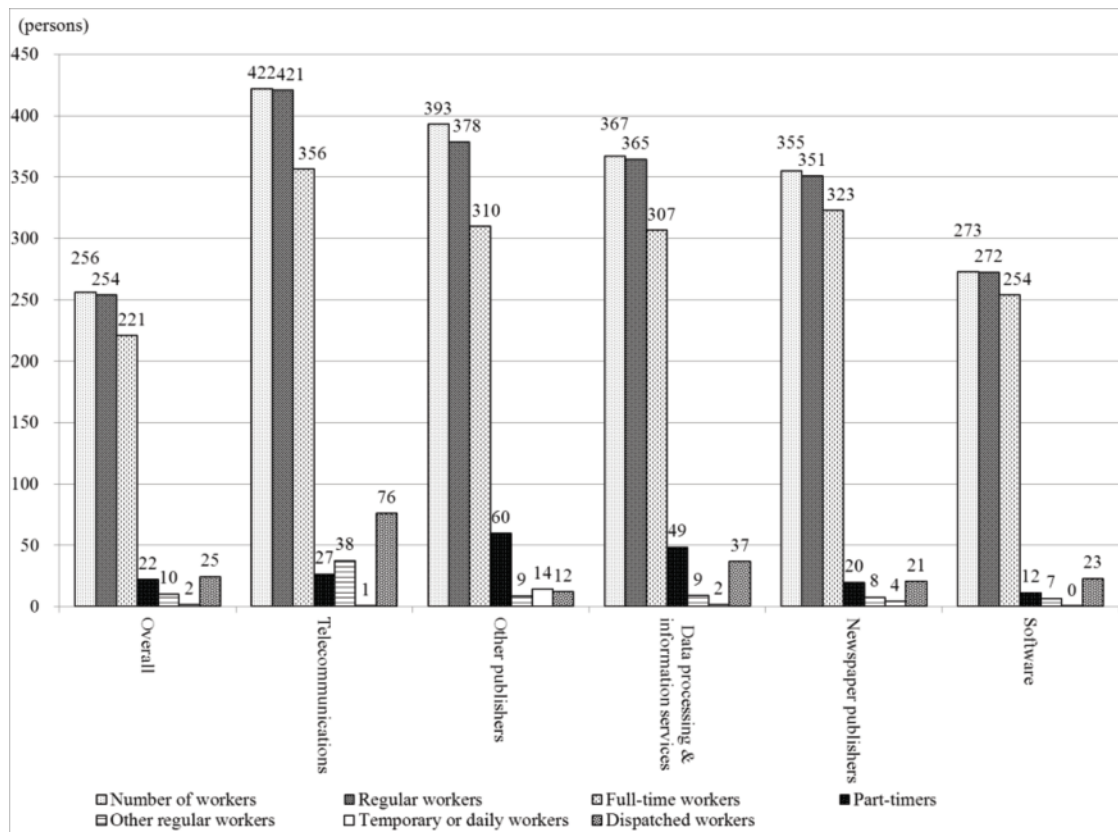
Fig. 1-1-10 Number of Workers

(Unit: persons)

	Number of companies	Number of workers	Regular workers				Temporary or daily workers	Dispatched workers
			Full-time workers	Part-timers	Other regular workers			
Overall	4,405	1,126,311	1,118,073	973,369	98,567	46,137	8,238	108,143
Telecommunications	382	161,029	160,658	136,109	10,176	14,373	371	29,120
Private broadcasting	420	45,891	45,141	39,254	2,135	3,752	750	6,747
Cablecasting	217	13,526	13,370	11,263	1,622	485	156	1,357
Software	2,330	635,046	634,551	591,254	27,056	16,241	495	53,478
Data processing & information services	1,257	460,704	458,206	385,366	61,105	11,735	2,498	46,358
Internet based services	576	148,127	147,415	127,168	9,956	10,291	712	21,470
Video picture information production & distribution	442	34,839	34,352	30,260	2,124	1,968	487	3,840
Sound information production	74	3,397	3,143	2,638	240	265	254	132
Newspaper publishers	104	36,918	36,475	33,578	2,073	824	443	2,155
Other publishers	263	103,336	99,537	81,466	15,747	2,324	3,799	3,235
Commercial art & graphic design	114	6,446	6,309	5,558	458	293	137	451
Services incidental to video picture, sound information, character information production & distribution	94	6,818	6,736	5,858	657	221	82	534
(Reproduced) TV/radio program production work	389	19,725	19,228	17,107	1,092	1,029	497	1,655

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

Fig. 1-1-11 Number of Workers per Company for Major Business Types



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

1. Outline of survey results

- The number of companies rated as an information and communications company (meaning companies for which their sales from the information and communications business are rated as being the largest) was 3,939. The number of establishments was 12,505 and the number of regular workers was 833,800.
- The total sales were 36.8445 trillion yen and the sales from the information and communications business were 35.5732 trillion yen. The operating profit was 2.8443 trillion and the ordinary profit was 2.7837 trillion yen. The number of subsidiaries and affiliated companies owned was 4,156.

Note: Data shown in “Section 2: Results Based on Companies Rated as Mainly Engaged in the IC Business” are those for information and communications 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 (person)	Number of regular workers (person)	Sales		Operating profit (100 million yen)	Ordinary profit (100 million yen)	Number of subsidiaries and affiliated companies owned
					(100 million yen)	Sales from the IC business (100 million yen)			
Total	4,405	16,319	1,126,311	1,118,073	472,915	386,583	32,708	31,966	5,778
IC companies	3,939	12,505	839,078	833,800	368,445	355,732	28,443	27,837	4,156
Telecommunications	91	624	81,353	81,342	162,911	161,867	16,873	16,632	462
Private broadcasting	389	1,081	30,351	29,715	24,854	23,984	1,210	839	268
Cablecasting	195	297	10,542	10,391	4,661	4,634	511	450	51
Software	1,744	4,782	399,563	399,293	77,483	72,369	4,299	4,245	1,317
Data processing & information services	680	2,588	196,605	195,877	51,156	48,612	3,375	3,322	656
Internet based services	236	473	30,188	30,090	11,971	11,467	1,165	1,002	259
Video picture information production & distribution	302	429	18,058	17,865	5,857	5,155	282	331	246
TV program production	236	304	11,326	11,177	2,824	2,706	93	93	50
Sound information production	23	26	1,432	1,325	1,072	1,071	32	30	10
Radio program production	18	21	340	233	18	18	-0.3	-0.2	-
Newspaper publishers	84	1,390	33,650	33,231	13,677	12,232	17	236	512
Other publishers	126	591	31,977	29,418	13,860	13,442	716	784	329
Commercial art & graphic design	37	53	2,443	2,380	496	484	4	4	17
Services incidental to video picture, sound information, character information production & distribution	32	171	2,916	2,873	446	414	-41	-37	29
Manufacturing companies	63	480	81,370	81,092	44,487	16,104	407	899	869
Wholesalers & retailers	127	1,134	54,030	53,756	19,111	3,860	1,112	829	346
Service companies	95	615	46,463	46,448	5,513	861	397	179	59
Other	181	1,585	105,370	102,977	35,359	10,026	2,349	2,222	348

* Results based on companies rated as mainly engaged in the IC business

The survey results of Chapter 1, Section 2 are compiled by rating companies according to their business that generates the largest sales.

Companies are firstly classified according to their largest sales (into categories such as “information and communications companies,” “manufacturing companies,” and “wholesale or retail companies”), and then their main business is determined according to their business type that generates the largest sales (each company is subdivided as a “telecommunications company,” “private broadcasting company,” or the like).

(For example, when a company is engaged in the telecommunications business and the information service business and its sales from the telecommunications business are larger, the company is recorded as a telecommunications company. The overall total and the sum of each business type coincide with each other.)

2. Number of companies and sales

- By capital size, information and communications companies with capital of less than 100 million yen accounted for 50% or more of the total. By sales, those with sales of 1 billion yen or more accounted for nearly 50%, and by the number of workers, those with less than 100 regular workers accounted for 60% or more of the total. Looking at the number of companies by business type, over 60% of companies were engaged in the software business, the data processing and information service business, or the private broadcasting business.
- The sales of telecommunications companies, software companies, and data processing and information service companies accounted for 60% or more of the overall sales of the information and communications industry.
- The average of sales per company was 9.35 billion yen, with those for telecommunications companies being the largest, followed by those for newspaper publishers and other publishers.

Fig. 1-2-2 Composition Ratios of Companies by Capital Size

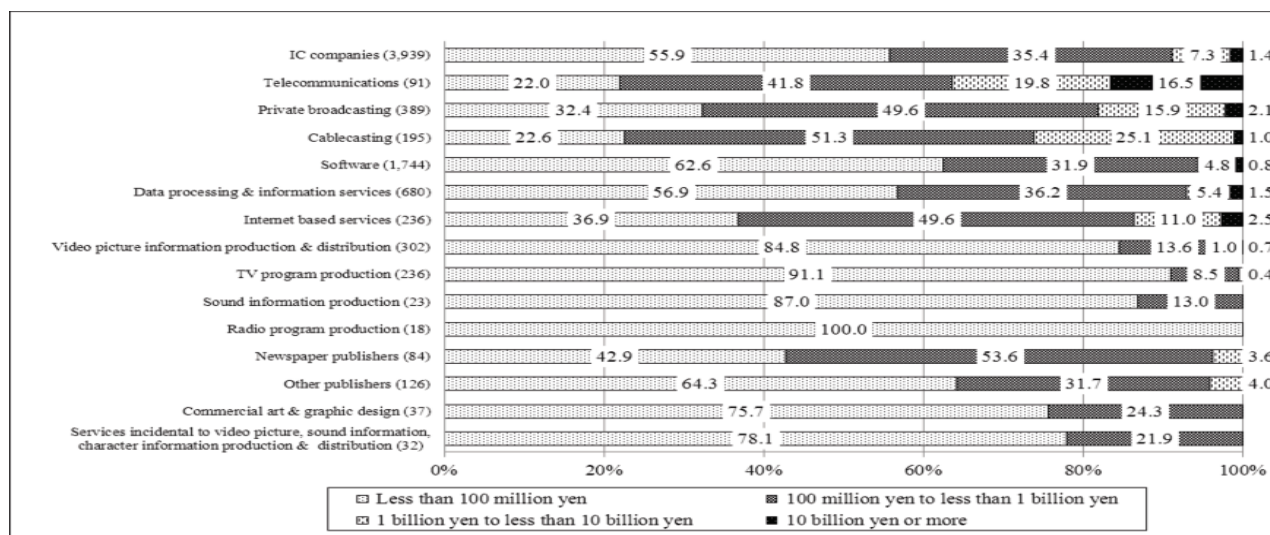


Fig. 1-2-3 Composition Ratios of Companies by Sales

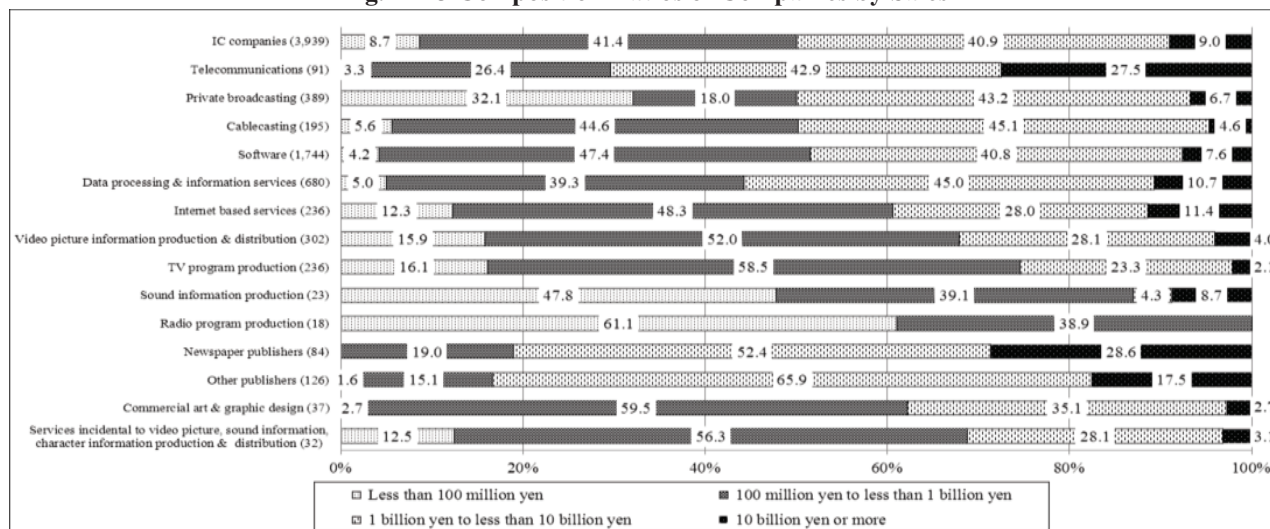


Fig. 1-2-4 Composition Ratios of Companies by Number of Regular Workers

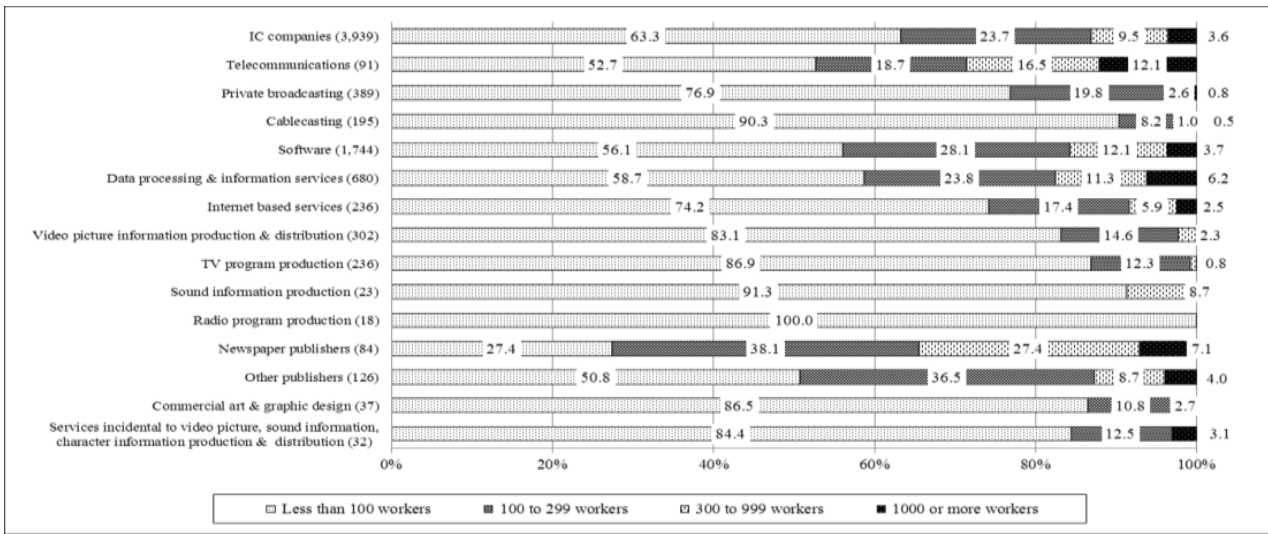


Fig. 1-2-5 Number of Companies and Sales

(Unit: companies, million yen, %)

	Number of companies		Sales				Sales per company		
		Composition ratio %		Composition ratio %	Sales from the information and communications business	Composition ratio %	Percentage among total sales (%)	Sales from the information and communications business	
Total	4,405	100.0	47,291,525	100.0	38,658,326	100.0	81.7	10,735.9	8,776.0
IC companies	3,939	89.4	36,844,513	77.9	35,573,207	92.0	96.5	9,353.8	9,031.0
Telecommunications	91	2.1	16,291,129	34.4	16,186,655	41.9	99.4	179,023.4	177,875.3
Private broadcasting	389	8.8	2,485,406	5.3	2,398,382	6.2	96.5	6,389.2	6,165.5
Cablecasting	195	4.4	466,110	1.0	463,414	1.2	99.4	2,390.3	2,376.5
Software	1,744	39.6	7,748,270	16.4	7,236,929	18.7	93.4	4,442.8	4,149.6
Data processing & information services	680	15.4	5,115,618	10.8	4,861,249	12.6	95.0	7,523.0	7,148.9
Internet based services	236	5.4	1,197,133	2.5	1,146,715	3.0	95.8	5,072.6	4,859.0
Video picture information production & distribution	302	6.9	585,689	1.2	515,517	1.3	88.0	1,939.4	1,707.0
TV program production	236	5.4	282,408	0.6	270,646	0.7	95.8	1,196.6	1,146.8
Sound information production	23	0.5	107,225	0.2	107,128	0.3	99.9	4,662.0	4,657.7
Radio program production	18	0.4	1,847	0.0	1,750	0.0	94.7	102.6	97.2
Newspaper publishers	84	1.9	1,367,693	2.9	1,223,184	3.2	89.4	16,282.1	14,561.7
Other publishers	126	2.9	1,386,019	2.9	1,344,188	3.5	97.0	11,000.2	10,668.2
Commercial art & graphic design	37	0.8	49,638	0.1	48,415	0.1	97.5	1,341.6	1,308.5
Services incidental to video picture, sound information, character information production & distribution	32	0.7	44,583	0.1	41,431	0.1	92.9	1,393.2	1,294.7
Manufacturing companies	63	1.4	4,448,748	9.4	1,610,404	4.2	36.2	70,615.0	25,562.0
Wholesalers & retailers	127	2.9	1,911,093	4.0	386,015	1.0	20.2	15,048.0	3,039.5
Service companies	95	2.2	551,306	1.2	86,063	0.2	15.6	5,803.2	905.9
Other	181	4.1	3,535,865	7.5	1,002,637	2.6	28.4	19,535.2	5,539.4

3. Profits and assets

- The average of ordinary profit per company was 0.71 billion yen. The amount of total assets was 11.63 billion yen, while that of net assets was 6.23 billion yen.
- The ratio of ordinary profit to sales was 7.6%, the return on assets was 6.1%, the turnover of total capital was 0.80 times, and the capital adequacy ratio was 53.6%. The labor productivity was 13.148 million yen/person and the labor share was 44.6%.

Fig. 1-2-6 Profits and Assets per Company

	Number of companies	Ordinary profit (million yen)	Total assets (Total capital) (million yen)	Net assets (Own capital) (million yen)	Ratio of ordinary profit to sales (%)	Return on assets (ROA) (%)	Turnover of total capital (times)	Capital adequacy ratio (%)	Financial leverage (fold)
Total	4,405	725.7	12,605.0	6,319.2	6.8	5.8	0.85	50.1	2.0
IC companies	3,939	706.7	11,633.2	6,231.1	7.6	6.1	0.80	53.6	1.9
Telecommunications	91	18,276.6	277,494.2	144,443.5	10.2	6.6	0.65	52.1	1.9
Private broadcasting	389	215.8	8,729.4	6,330.8	3.4	2.5	0.73	72.5	1.4
Cablecasting	195	230.7	3,737.4	1,887.0	9.7	6.2	0.64	50.5	2.0
Software	1,744	243.4	3,352.2	1,643.3	5.5	7.3	1.33	49.0	2.0
Data processing & information services	680	488.5	6,732.5	3,352.3	6.5	7.3	1.12	49.8	2.0
Internet based services	236	424.5	5,197.0	2,880.0	8.4	8.2	0.98	55.4	1.8
Video picture information production & distribution	302	109.7	2,217.5	1,153.2	5.7	4.9	0.87	52.0	1.9
TV program production	236	39.3	726.2	382.7	3.3	5.4	1.65	52.7	1.9
Sound information production	23	131.6	2,631.7	1,157.4	2.8	5.0	1.77	44.0	2.3
Radio program production	18	-1.2	49.4	22.1	-1.1	-2.4	2.08	44.6	2.2
Newspaper publishers	84	280.8	20,397.5	10,239.6	1.7	1.4	0.80	50.2	2.0
Other publishers	126	622.3	17,903.6	11,602.5	5.7	3.5	0.61	64.8	1.5
Commercial art & graphic design	37	10.4	810.0	287.3	0.8	1.3	1.66	35.5	2.8
Services incidental to video picture, sound information, character information production & distribution	32	-115.6	2,075.6	1,135.8	-8.3	-5.6	0.67	54.7	1.8
Manufacturing companies	63	1,426.6	68,289.9	22,761.2	2.0	2.1	1.03	33.3	3.0
Wholesalers & retailers	127	652.6	9,289.5	4,358.0	4.3	7.0	1.62	46.9	2.1
Service companies	95	188.9	3,225.4	1,600.2	3.3	5.9	1.80	49.6	2.0
Other	181	1,227.5	21,622.3	6,367.1	6.3	5.7	0.90	29.4	3.4

Notes: Ratio of ordinary profit to sales = Ordinary profit / Sales × 100 (Productivity index to ascertain how much profit was obtained from the total sales)

Return on assets (ROA) = Ordinary profit / Total assets (total capital) × 100 (Productivity index to ascertain how much profit was obtained from the total capital invested)

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)

Financial leverage = Total assets (total capital) / Net assets (own capital) (Index to show how many times the amount of total capital is as large as the amount of own capital and thereby indicate the debt capital (liabilities))

Fig. 1-2-7 Added Value per Company

	Number of companies	Value added (million yen)	Value added ratio (%)	Labor productivity (10,000 yen/person)	Labor share (%)	Labor equipment ratio (10,000 yen/person)
Total	4,405	2,998.0	27.9	1,181.2	45.5	1,728.9
IC companies	3,939	2,783.1	29.8	1,314.8	44.6	2,062.2
Telecommunications	91	36,829.9	20.6	4,120.3	18.9	15,365.3
Private broadcasting	389	1,441.0	22.6	1,886.4	44.3	3,891.7
Cablecasting	195	823.4	34.4	1,545.1	24.0	3,481.6
Software	1,744	1,922.6	43.3	839.8	64.3	188.4
Data processing & information services	680	3,168.9	42.1	1,100.1	48.1	463.7
Internet based services	236	1,474.7	29.1	1,156.6	42.1	195.2
Video picture information production & distribution	302	566.8	29.2	958.1	59.7	1,155.5
TV program production	236	381.2	31.9	805.0	69.4	194.0
Sound information production	23	493.3	10.6	856.3	61.3	172.8
Radio program production	18	52.3	51.0	404.3	88.9	27.5
Newspaper publishers	84	5,234.2	32.1	1,323.1	63.5	2,412.1
Other publishers	126	2,953.0	26.8	1,264.8	55.7	1,390.2
Commercial art & graphic design	37	444.8	33.2	691.4	75.1	181.8
Services incidental to video picture, sound information, character information production & distribution	32	722.8	51.9	805.0	79.7	1,218.7
Manufacturing companies	63	13,688.9	19.4	1,063.5	50.8	562.8
Wholesalers & retailers	127	2,867.7	19.1	677.5	45.2	428.2
Service companies	95	2,747.7	47.3	562.0	66.1	90.5
Other	181	4,177.7	21.4	734.3	46.6	1,366.5

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

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)

4. Workers

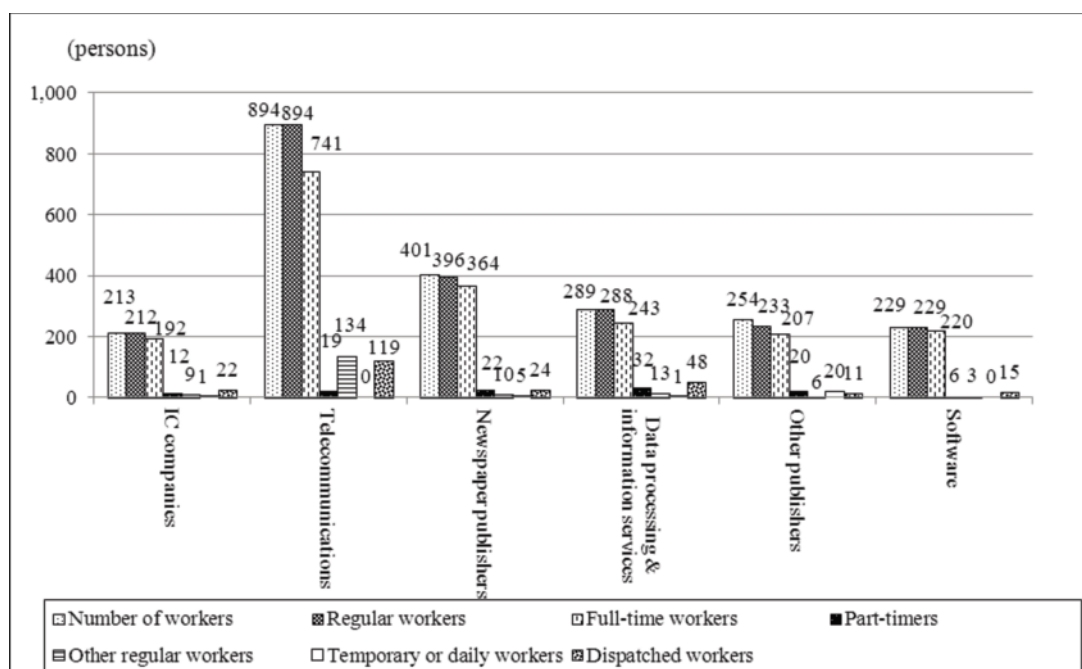
- The total number of regular workers working for information and communications companies was 833,800, out of which 90% or 754,335 were full-time workers. The number of dispatched workers was 85,546.
- Over 60% of regular workers were working for software companies, data processing and information service companies or telecommunications companies.
- The average number of regular workers per company was 212. The number was the largest for telecommunications companies, followed by newspaper publishers, and data processing and information service companies.

Fig. 1-2-8 Number of Workers

	Number of companies	Number of workers	Regular workers						Temporary or daily workers	Dispatched workers
			Composition ratio (%)	Full-time workers	Part-timers	Other regular workers	Composition ratio (%)			
Total	4,405	1,126,311	1,118,073	100.0	973,369	98,567	46,137	8,238	108,143	
Composition ratio among regular workers (%)	-	-	100.0	-	87.1	8.8	4.1	-	-	
IC companies	3,939	839,078	833,800	74.6	754,335	45,311	34,154	5,278	85,546	
Composition ratio among regular workers (%)	-	-	100.0	-	90.5	5.4	4.1	-	-	
Telecommunications	91	81,353	81,342	7.3	67,393	1,732	12,217	11	10,853	
Private broadcasting	389	30,351	29,715	2.7	24,094	1,907	3,714	636	6,320	
Cablecasting	195	10,542	10,391	0.9	9,003	927	461	151	1,246	
Software	1,744	399,563	399,293	35.7	383,414	11,275	4,604	270	25,500	
Data processing & information services	680	196,605	195,877	17.5	165,068	21,689	9,120	728	32,853	
Internet based services	236	30,188	30,090	2.7	27,161	1,947	982	98	3,556	
Video picture information production & distribution	302	18,058	17,865	1.6	15,655	888	1,322	193	1,523	
TV program production	236	11,326	11,177	1.0	9,999	518	660	149	874	
Sound information production	23	1,432	1,325	0.1	1,137	179	9	107	38	
Radio program production	18	340	233	0.0	156	68	9	107	-	
Newspaper publishers	84	33,650	33,231	3.0	30,543	1,884	804	419	2,040	
Other publishers	126	31,977	29,418	2.6	26,142	2,503	773	2,559	1,357	
Commercial art & graphic design	37	2,443	2,380	0.2	2,098	166	116	63	57	
Services incidental to video picture, sound information, character information production & distribution	32	2,916	2,873	0.3	2,627	214	32	43	203	
Manufacturing companies	63	81,370	81,092	7.3	75,457	1,517	4,118	278	3,710	
Wholesalers & retailers	127	54,030	53,756	4.8	28,477	24,133	1,146	274	954	
Service companies	95	46,463	46,448	4.2	28,923	13,033	4,492	15	3,334	
Other	181	105,370	102,977	9.2	86,177	14,573	2,227	2,393	14,599	

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

Fig. 1-2-9 Number of Workers per Company for Major Business Types



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 789 companies.

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

The number of companies engaged in the telecommunications and broadcasting business was 994. The compositions of business operators are as shown below, with a variety of company sizes.

- By capital size, business operators with capital of 100 million yen or more but less than 1 billion yen were the largest in number, accounting for 47.4% of the total, followed by those with capital of less than 100 million yen (29.1%).
- By sales, those with sales of 100 million yen or more but less than 1 billion yen and those with sales of 1 billion yen or more but less than 10 billion yen accounted for nearly 30% (34.4% and 31.5%), respectively.
- By the number of workers, business operators with one to 29 workers accounted for 63.2%, followed by those with 30 to 99 workers (20.6%).

Fig. 2-1 Composition of Telecommunications and Broadcasting Companies by Capital Size

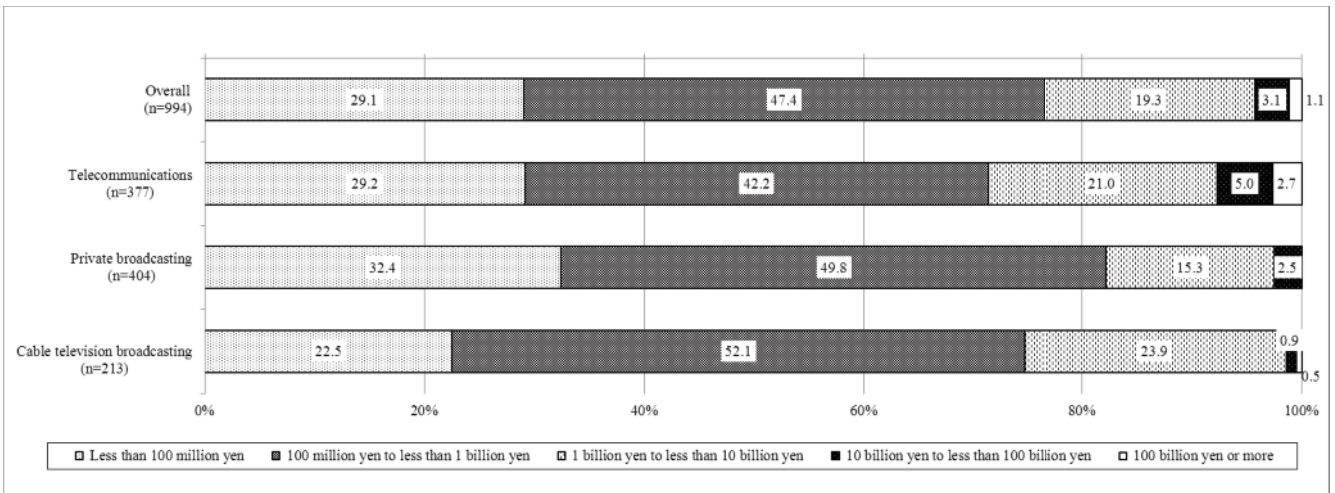


Fig. 2-2 Composition of Telecommunications and Broadcasting Companies by Sales

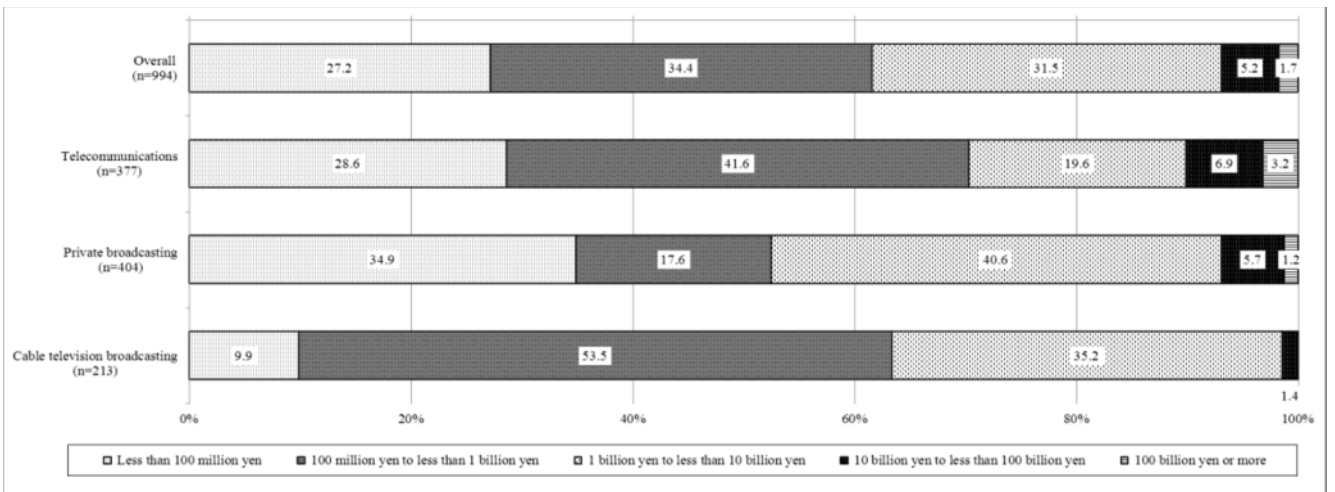
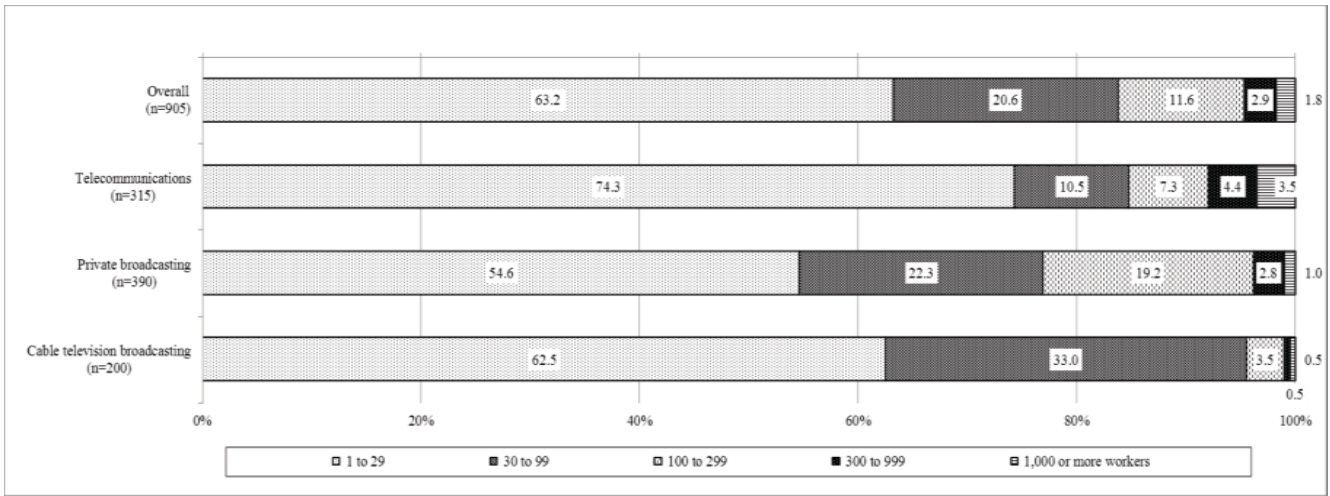


Fig. 2-3 Composition of Telecommunications and Broadcasting Companies by Number of Workers



* Figures for FY2007 and FY2008 in Chapter 2 are based on data from the Basic Survey on the Communications and Broadcasting Industry.

2. Sales

(1) Changes in sales

- The total sales of the telecommunications and broadcasting business in FY2009 were 17.4478 trillion yen.
- By type of business, sales were 14.0895 trillion yen for the telecommunications business, 2.3913 trillion yen for the private broadcasting business, and 297.1 billion yen for the cable television broadcasting business.
- Looking at the engagement in side-businesses, many of the companies engaged in the telecommunications business and the cable television broadcasting business operate other businesses concurrently.

Fig. 2-4 Changes in Sales by Business Type

(Unit: companies, 100 million yen, % (Upper: sales Lower: percentage))

Classification	FY2007		FY2008		FY2009	
	Number of companies	Sales	Number of companies	Sales	Number of companies	Sales
Overall	1,145	190,075 100.0%	1,170	179,849 100.0%	995	174,478 100.0%
Telecommunications	466	153,063 80.5%	457	144,055 80.1%	377	140,895 80.8%
Broadcasting	679	37,013 19.5%	713	35,793 19.9%	618	33,583 19.2%
Private broadcasting	462	26,603 14.0%	486	25,177 14.0%	404	23,913 13.7%
Cable television broadcasting	216	3,852 2.0%	226	3,972 2.2%	213	2,971 1.7%
NHK	1	6558 3.5%	1	6645 3.7%	1	6699 3.8%

* Data for NHK are based on publicized materials.

Fig. 2-5 Engagement in Side-Businesses

(Unit: companies, 100 million yen)

	Telecommunications	
	Number of companies	Sales
(Relevant business)		
Telecommunications	377	140,895
(Other businesses)		
Private broadcasting	9	1,972
Cable TV broadcasting	190	2,877

	Private broadcasting	
	Number of companies	Sales
(Relevant business)		
Private broadcasting	404	23,913
(Other businesses)		
Telecommunications	9	55
Cable TV broadcasting	8	63

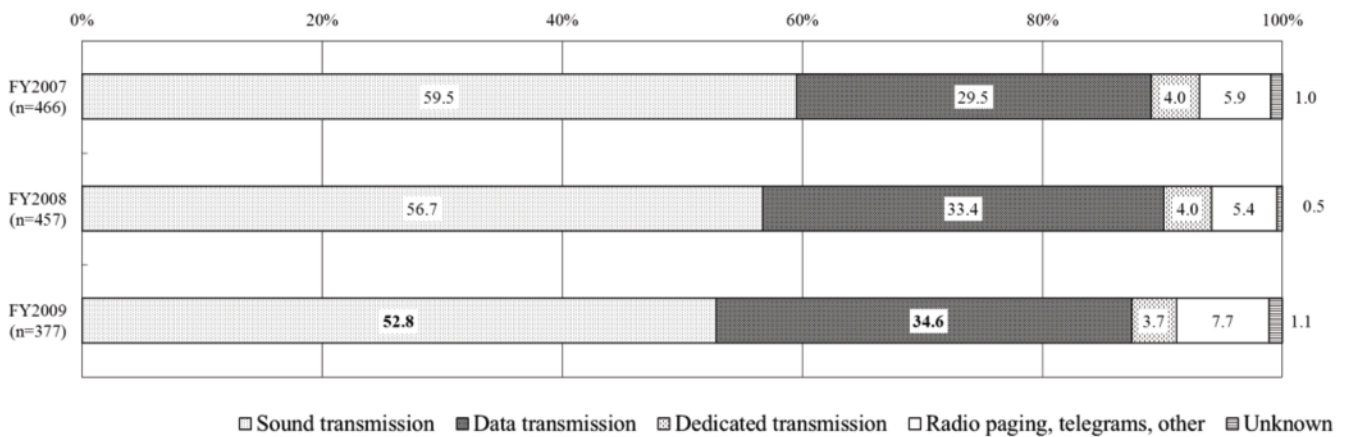
	Cable TV broadcasting	
	Number of companies	Sales
(Relevant business)		
Cable TV broadcasting	213	2,971
(Other businesses)		
Telecommunications	190	26,550
Private broadcasting	8	75

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

(2) Changes in the breakdown of sales

- Looking at the breakdown of sales of the telecommunications business in FY2009, sales from data transmission used for such purposes as an Internet connection continued to increase, accounting for 34.6% of the total. Sales from mobile telecommunications accounted for 47.6% of the total.
- Regarding the private broadcasting business, 74.9% of the total sales in FY2009 were from terrestrial television broadcasting services and 12.5% were from satellite broadcasting services (BS and CS).
- Of the total sales of the cable television broadcasting business in FY2009, 80.1% were generated from basic services.

**Fig. 2-6 Changes in the Breakdown of Sales of the Telecommunications Business
<Sound or Data Transmission>**



**Fig. 2-7 Changes in the Breakdown of Sales of the Telecommunications Business
<Fixed or Mobile Telecommunications>**

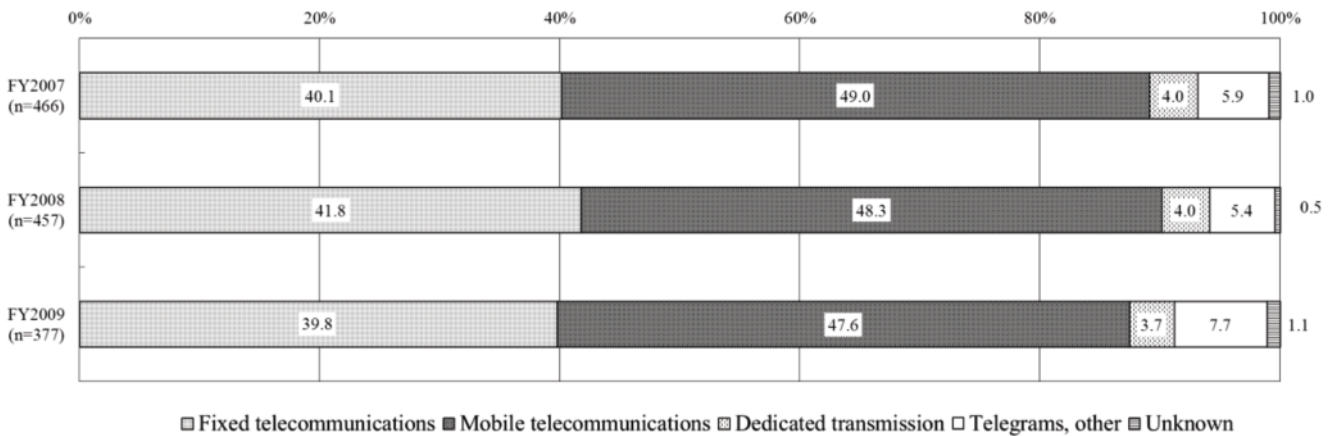


Fig. 2-8 Changes in the Breakdown of Sales of the Private Broadcasting Business

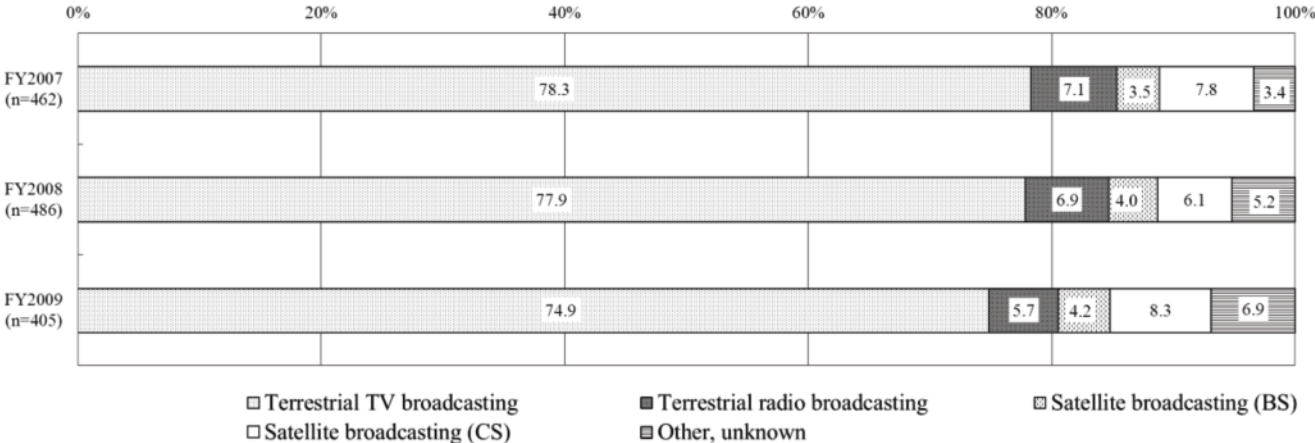
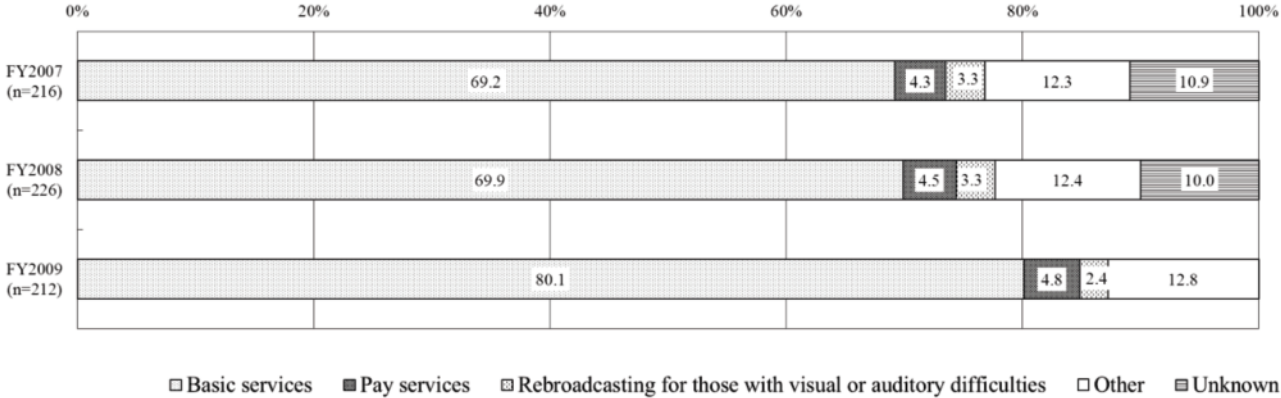


Fig. 2-9 Changes in the Breakdown of Sales of the Cable Television Broadcasting Business



3. Capital investment

- The amount of acquisition and capital investment for the telecommunications and broadcasting business in FY2009 was 2.5966 trillion yen.
- By type of business, the amount of capital investment was 2.3297 trillion yen for the telecommunications business, 101.6 billion yen for the private broadcasting business, and 86.9 billion yen for the cable television broadcasting business.

Fig. 2-10 Changes in the Amount of Acquisition and Capital Investment by Type of Business

(Unit: companies, 100 million yen, % (Upper: capital investment Lower: percentage))

Classification	FY2007		FY2008		FY2009	
	Number of companies	Capital investment	Number of companies	Capital investment	Number of companies	Capital investment
Overall	835	28,016 100.0%	876	27,448 100.0%	616	25,966 100.0%
Telecommunications	349	24,271 86.6%	355	24,340 88.7%	216	23,297 89.7%
Broadcasting	486	3,745 13.4%	521	3,108 11.3%	400	2,669 10.3%
Private broadcasting	304	2,338 8.3%	317	1,643 6.0%	230	1,016 3.9%
Cable television broadcasting	181	748 2.7%	203	716 2.6%	169	869 3.3%
NHK	1	659 2.4%	1	749 2.7%	1	784 3.0%

* Data for NHK are based on publicized materials.

4. Workers

- The number of workers engaged in the telecommunications and broadcasting business was 122,468, out of which 118,835 were regular workers and 3,633 were temporary or daily workers.

Fig. 2-11 Number of Workers Engaged in the Telecommunications and Broadcasting Business

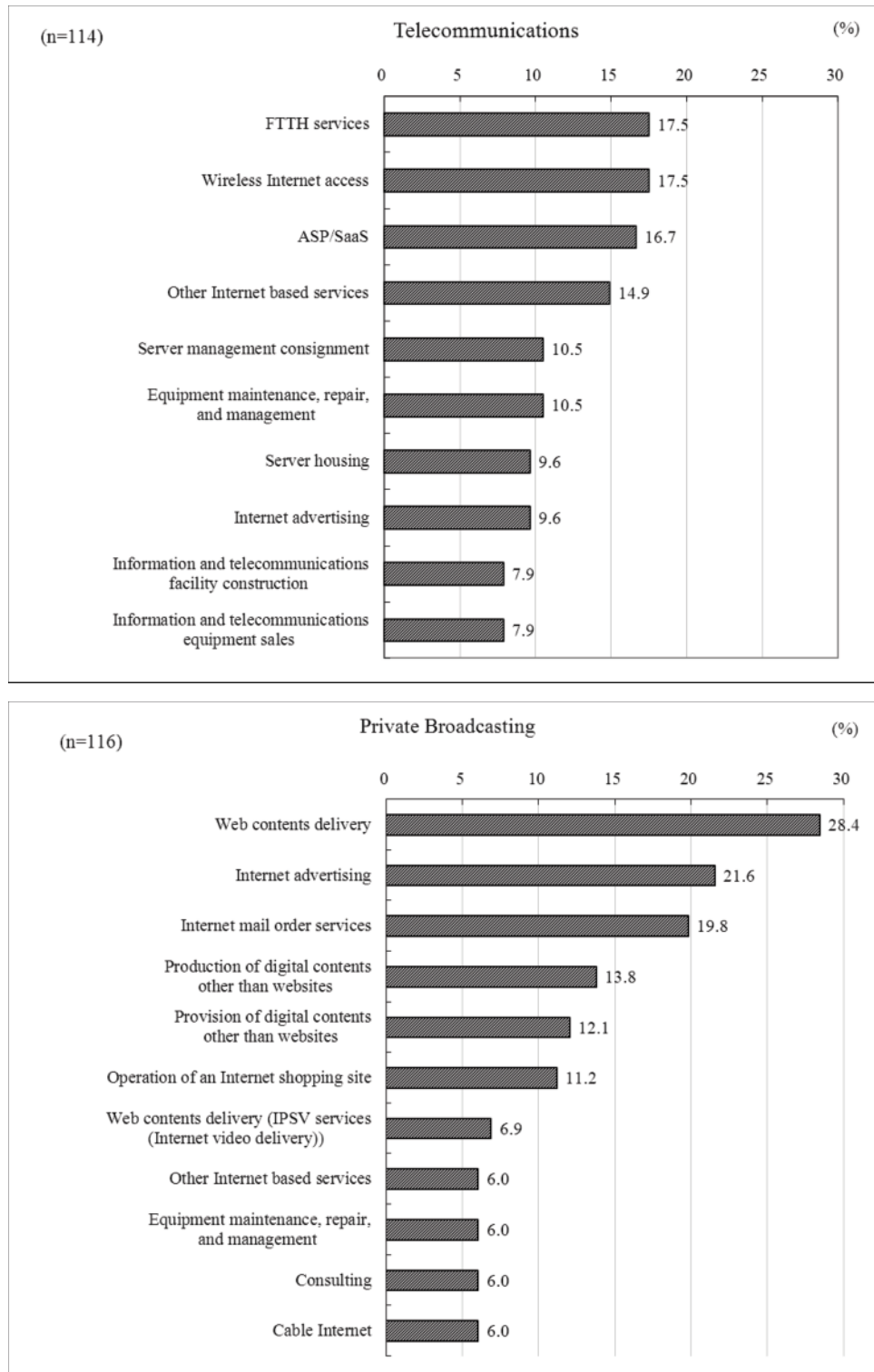
(Unit: persons)

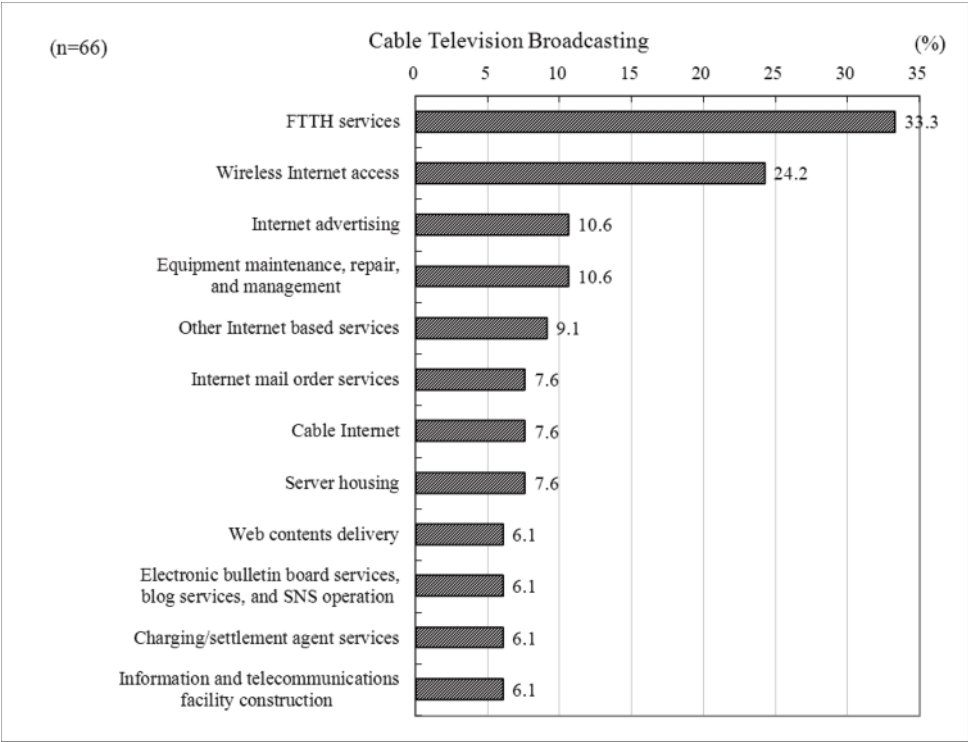
	Number of companies	Number of workers	Regular workers			Workers transferred to other companies	Temporary or daily workers	Dispatched workers
			Full-time workers	Part-timers				
Telecommunications & broadcasting	905	122,468	118,835	96,496	5,988	3,259	3,633	20,100
Telecommunications	315	80,938	80,733	66,577	3,397	2,391	205	13,218
Private broadcasting	390	33,772	30,364	24,371	1,803	732	3,408	5,818
Cable TV broadcasting	200	7,758	7,738	5,548	788	136	20	1,064

5. Future business operation

- Regarding new business fields that companies intend to start within one year, the most common answers were “FTTH services” and “wireless Internet access” in the telecommunications business, “web contents delivery” in the private broadcasting business, and “FTTH services” in the cable television broadcasting business.

Fig. 2-12 New Businesses that Companies Intend to Start in the Future (multiple answers allowed)





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 305 companies.

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

The number of companies engaged in the broadcast program production business was 305.

- Business operators with capital of less than 50 million yen accounted for 82.0%, and those with less than 100 workers accounted for 93.7% of the total. Most of the companies engaged in this business are small and medium-sized.
- By sales, business operators with sales of 100 million yen to less than 300 million yen were the largest in number, accounting for 30.8% of the total, followed by those with sales of less than 50 million yen (19.3%) and those with sales of 1 billion yen or more (18.0%).
- By broadcast media, 91.5% of the business operators were engaged in television program production, 22.6% in radio program production, and 4.6% in data broadcasting program production.

[* Figures for FY2007 and FY2008 in Chapter 3 are based on data from the Survey on Television Program Production.]

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

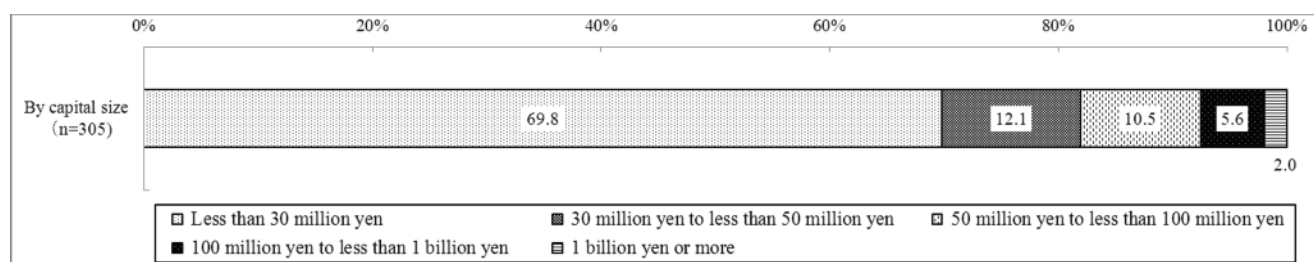


Fig. 3-2 Composition of Broadcast Program Production Companies by Number of Workers

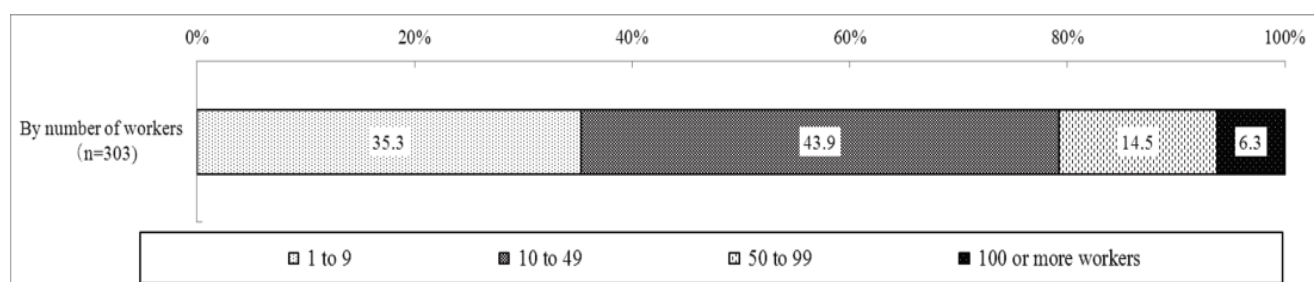


Fig. 3-3 Composition of Broadcast Program Production Companies by Sales

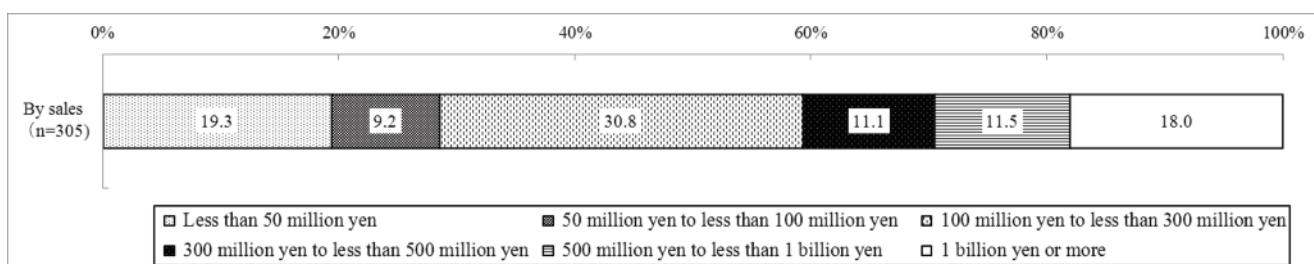
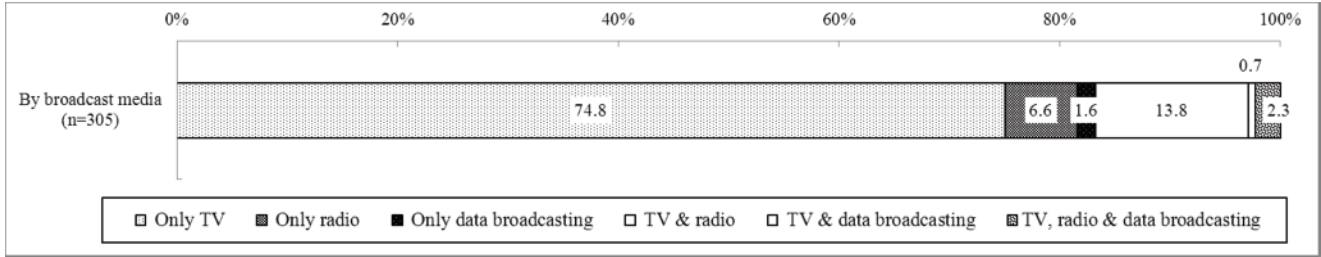


Fig. 3-4 Composition of Broadcast Program Production Companies by Broadcast Media



2. Sales

- The total sales of the broadcast program production business in FY2009 were 212.7 billion yen and the average of sales per company was 700 million yen.
- The average of sales per company for those with capital of less than 50 million yen was 0.42 billion yen, while the average for companies with capital of 50 million yen or more was 1.96 billion yen.

Fig. 3-5 Changes in Average Sales per Company

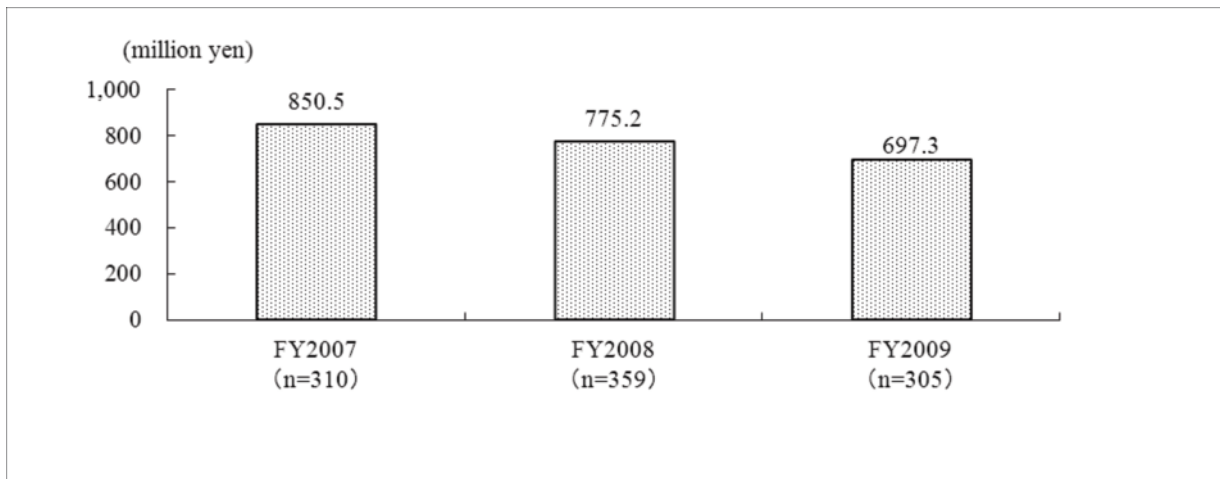
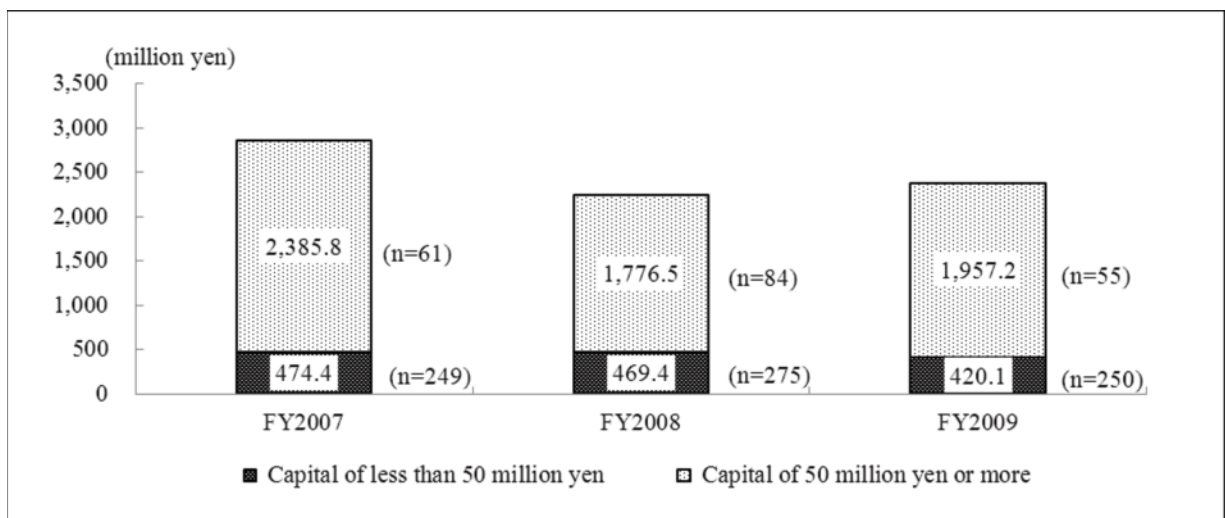


Fig. 3-6 Changes in Average Sales per Company by Capital Size

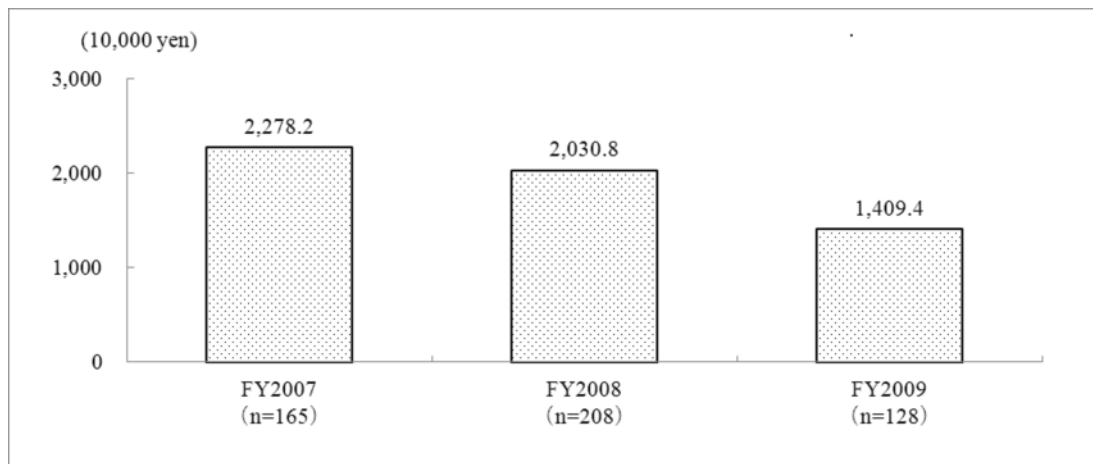


3. Capital investment

(1) Changes in the amount of capital investment

- The average of capital investment per company for the broadcast program production business in FY2009 was 14.09 million yen.

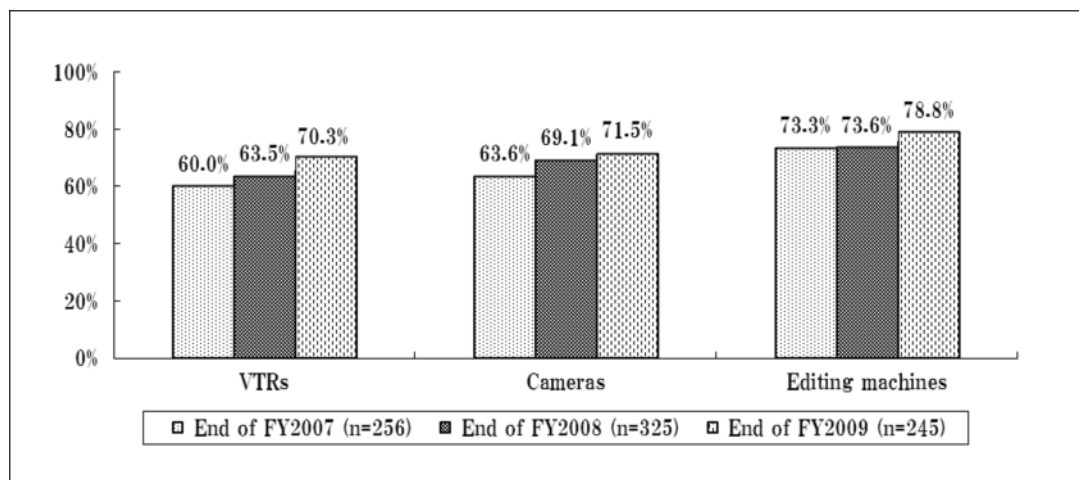
Fig. 3-7 Changes in Average Capital Investment per Company



(2) Digitalization of instruments

- Looking at the digitalization of instruments used for broadcast program production, 70.3% of VTRs, 71.5% of cameras, and 78.8% of editing machines were digitalized.

Fig. 3-8 Changes in Digitalization Ratios of Instruments Being Used



4. Workers

- The number of workers engaged in the broadcast program production business was 9,701, out of which 9,482 were regular workers and 219 were temporary or daily workers.

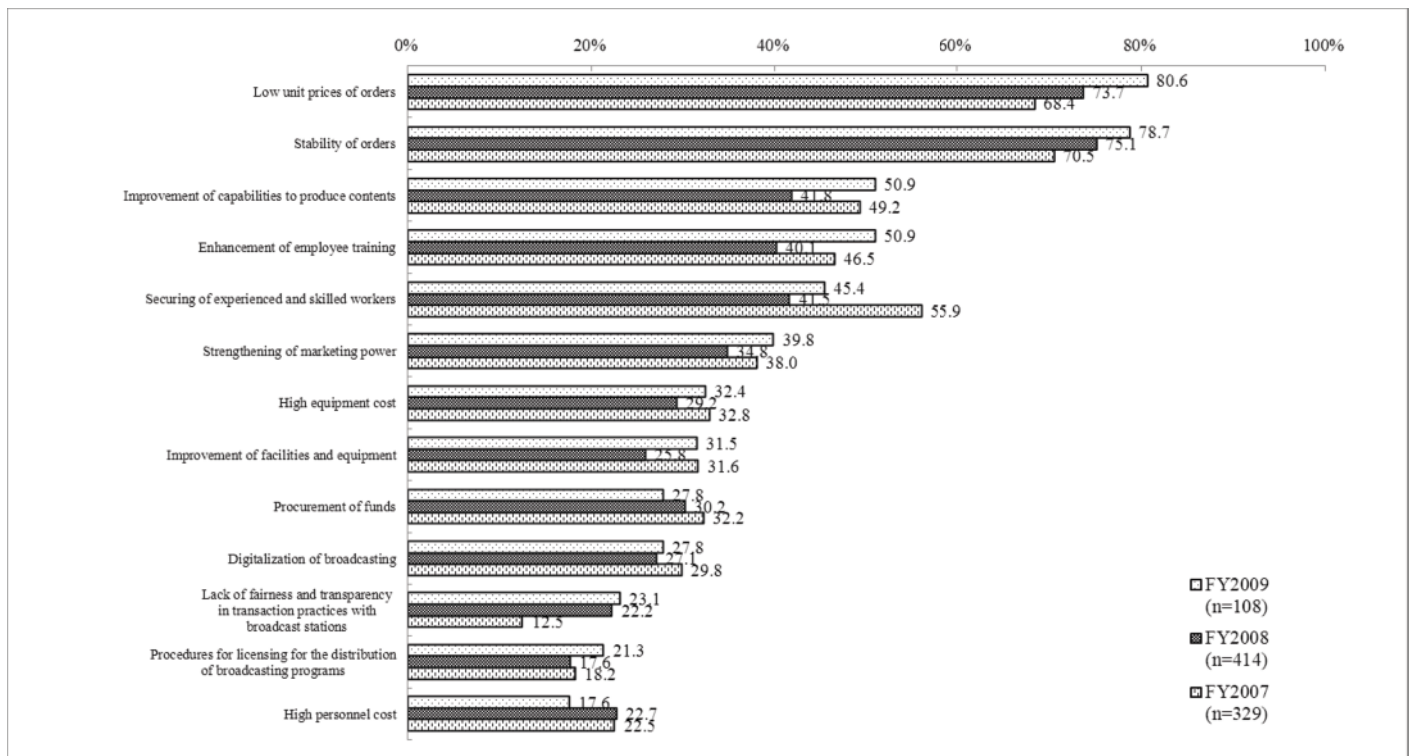
Fig. 3-9 Number of Workers Engaged in the Broadcast Program Production Business by Capital Size

	Overall											
	Composition ratio (%)	Less than 30 million yen	Composition ratio (%)	30 million yen to less than 50 million yen	Composition ratio (%)	50 million yen to less than 100 million yen	Composition ratio (%)	100 million yen to less than 1 billion yen	Composition ratio (%)	1 billion yen or more	Composition ratio (%)	
Number of companies	303	-	213	-	37	-	31	-	17	-	5	-
Number of workers	9,701	100.0	5,238	100.0	1,505	100.0	1,842	100.0	742	100.0	374	100.0
Regular workers	9,482	97.7	5,063	96.7	1,504	99.9	1,799	97.7	742	100.0	374	100.0
Full-time workers	8,069	83.2	4,096	78.2	1,326	88.1	1,616	87.7	673	90.7	358	95.7
Part-timers	456	4.7	320	6.1	48	3.2	77	4.2	11	1.5	-	-
Workers transferred to other companies	393	4.1	230	4.4	48	3.2	99	5.4	-	-	16	4.3
Temporary or daily workers	219	2.3	175	3.3	1	0.1	43	2.3	-	-	-	-
Dispatched workers	541	-	338	-	89	-	96	-	6	-	12	-

5. Management problems

- As management problems, 80.6% cited low unit prices of orders and 78.7% cited the need to stabilize orders.

Fig. 3-10 Management Problems in the Broadcast Program Production Business (multiple answers allowed)



Chapter 4 Internet Based Service Business

This Chapter shows the results of the Survey on Items for Each Business Type (Internet Based Services) based on valid responses from 236 companies.

1. Number of companies and sales

- The number of companies engaged in the web contents delivery service business accounted for 28.0%, the number of companies with capital of 100 million yen to less than 300 million yen accounted for 27.5%, and the number of companies with 5 to 9 workers accounted for 24.9% of the total.
- The average of sales per company was 1.69 billion yen.
- Regarding companies that provided the percentage of their advertising revenue, the sales per company were 1.75 billion yen and the amount of advertising revenue per company was 1.06 billion yen, on average, which accounted for 60.5% of the total revenue. By type of services, advertising revenue was the largest for the electronic bulletin board service, blog service, and SNS operation service business, accounting for 90.6% of the total revenue.

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

(Unit: companies, %, million yen)

	Total	Web information search services	Internet shopping site operation services	Electronic bulletin board services, blog services, and SNS operation	Web contents delivery services	Revenue from IPTV services	ASP/SaaS	Electronic authentication services	Information network security services	Charging/settlement agent services	Server management consignment	Other Internet based services
Number of companies	236	27	37	9	66	5	46	11	23	7	56	89
Composition ratio (%)	100.0	11.4	15.7	3.8	28.0	2.1	19.5	4.7	9.7	3.0	23.7	37.7
Sales	398,199	40,166	21,233	38,701	90,315	1,391	32,089	3,474	26,481	1,002	29,364	73,702
Composition ratio (%)	100.0	10.1	5.3	9.7	22.7	0.3	8.1	0.9	6.7	0.3	7.4	18.5
Average sales per company	1,687.3	1,487.6	573.9	4,300.1	1,368.4	278.2	697.6	315.8	1,151.3	143.1	524.4	828.1

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

As not all companies provided the breakdown of their sales, the total of the sales does not match the sum of the breakdown figures.

Fig. 4-2 Composition Ratios of the Number of Companies and Sales by Capital Size and Number of Workers

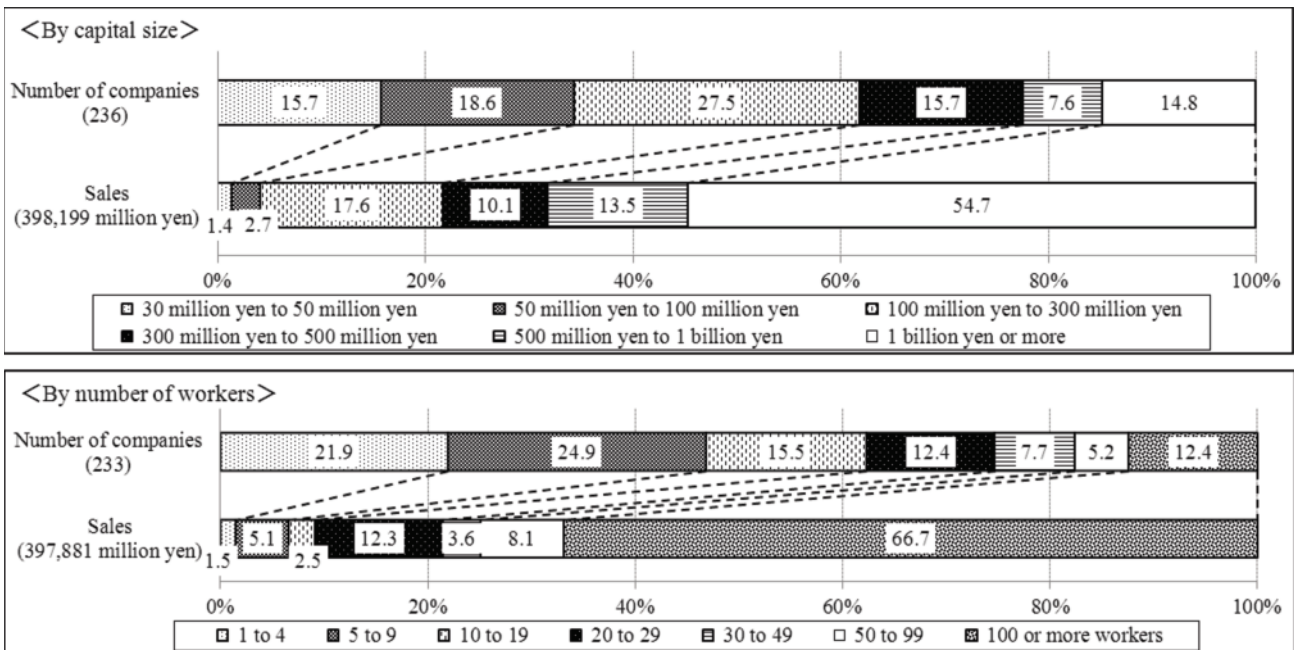


Fig. 4-3 Advertising Revenue and Percentage of Advertising Revenue by Service Type

(Unit: million yen, %)

	Total	Web information search services	Internet shopping site operation services	Electronic bulletin board services, blog services, and SNS operation services	Web contents delivery services
Sales per company	1,754.7	243.7	389.0	7,669.0	1,440.7
Advertising revenue per company	1,060.8	199.6	50.3	6,948.6	100.7
Percentage of advertising revenue (%)	60.5	81.9	12.9	90.6	7.0

(Note) Sales per company and advertising revenue per company are based on data for companies that provided the percentage of their advertising revenue.

2. Amount of acquisition and capital investment

- The average amount of acquisition and capital investment per company was 110 million yen. The amount for information and communications equipment and software was 70 million yen each.

Fig. 4-4 Amount of Acquisition and Capital Investment

(Unit: million yen)

		Total	Per company
FY2009 performance	Amount of acquisition and capital investment	14,677	105.6
	Information and communications equipment	5,990	66.6
	Software	7,493	66.3

(Note) The amount per company is calculated by dividing the total by the number of companies that provided valid responses.

3. Outsourcing

- 61.0% of companies implemented outsourcing.
- Among companies that implemented outsourcing, those with capital of 100 million yen to less than 300 million yen accounted for 29.9%. Regarding outsourcing cost, companies that spent 1 billion yen or more accounted for 36.2%.

Fig. 4-5 Status of Business Outsourcing

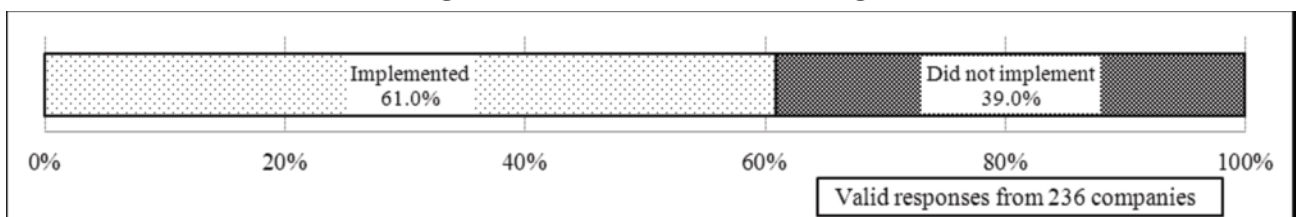
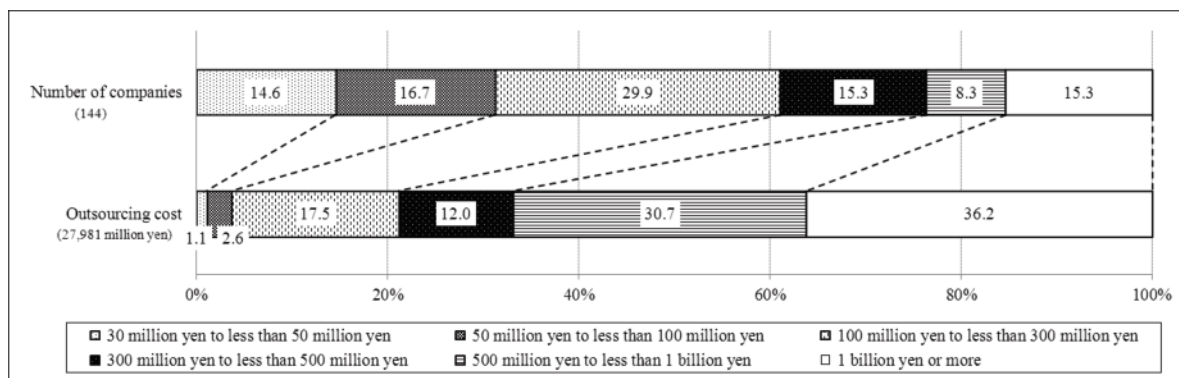


Fig. 4-6 Status of Business Outsourcing by Capital Size



4. Workers

- 79.0% of regular workers were full-time workers, 5.3% were part-timers, and 7.3% were contract workers.
- The average number of regular workers per company was 50, out of which 39 were full-time workers.
- Regarding full-time workers, the rate of those newly hired and that of resignees (i.e. persons who resigned from employment) were 7.4% and 5.6%, respectively, while the rate of contract workers newly hired and that of those with cancelled contracts were 21.5% and 10.9%, respectively. The rate of those newly hired is higher than the rate of resignees (those with cancelled contracts) in both cases. The rate of those newly hired is higher for contract workers than for full-time workers.

Fig. 4-7 Number of Workers by Capital Size

(Unit: persons, %)

	Total	30 million yen to less than 50 million yen		50 million yen to less than 100 million yen		100 million yen to less than 300 million yen		300 million yen to less than 500 million yen		500 million yen to less than 1 billion yen		1 billion yen to less than 5 billion yen		5 billion yen to less than 10 billion yen		10 billion yen or more		
		Composition rate (%)	Composition rate (%)	Composition rate (%)	Composition rate (%)	Composition rate (%)	Composition rate (%)	Composition rate (%)	Composition rate (%)	Composition rate (%)	Composition rate (%)	Composition rate (%)	Composition rate (%)	Composition rate (%)	Composition rate (%)	Composition rate (%)	Composition rate (%)	
Number of companies that provided valid answers	234	-	37	-	44	-	64	-	36	-	18	-	24	-	4	-	7	-
Number of regular workers	11,646	100.0	350	100.0	912	100.0	2,033	100.0	1,155	100.0	1,768	100.0	4,292	100.0	162	100.0	974	100.0
Full-time workers	9,204	79.0	313	89.4	597	65.5	1,095	53.9	1,043	90.3	1,603	90.7	3,626	84.5	159	98.1	768	78.9
Part-timers	617	5.3	27	7.7	94	10.3	60	3.0	45	3.9	148	8.4	232	5.4	1	0.6	10	1.0
Workers transferred to other companies	33	0.3	2	0.6	2	0.2	2	0.1	1	0.1	-	-	16	0.4	-	-	10	1.0
Contract workers	849	7.3	8	2.3	210	23.0	36	1.8	66	5.7	17	1.0	412	9.6	2	1.2	98	10.1
Temporary or daily workers	12	-	3	-	-	-	8	-	-	-	1	-	-	-	-	-	-	-
Dispatched workers	1,450	-	11	-	133	-	139	-	191	-	126	-	631	-	52	-	167	-
Number of regular workers per company	50	-	9	-	21	-	32	-	32	-	98	-	179	-	41	-	139	-
Full-time workers	39	-	8	-	14	-	17	-	29	-	89	-	151	-	40	-	110	-

Fig. 4-8 Those Newly Hired and Resignees (Those with Cancelled Contracts)

(Unit: persons, %)

(Unit: persons, %)

	Full-time workers	Percentage of those newly hired and resignees (%)	
		Composition ratio (%)	Percentage of those newly hired and resignees (%)
Number of those newly hired	718	100.0	7.4
New graduates	225	31.3	2.3
Mid-career workers	493	68.7	5.1
Number of resignees	546	-	5.6
Number of full-time workers + Number of resignees	9,750	-	-

(Note) 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

Number of mid-career workers = Number of those newly hired - Number of new graduates who were newly hired

	Contract workers	Percentage of those newly hired and those with cancelled contracts (%)	
		Composition ratio (%)	Percentage of those newly hired and those with cancelled contracts (%)
Number of those newly hired	205	100.0	21.5
New graduates	-	-	-
Mid-career workers	205	100.0	21.5
Number of those with cancelled contracts	104	-	10.9
Number of contract workers + Number of those with cancelled contracts	953	-	-

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

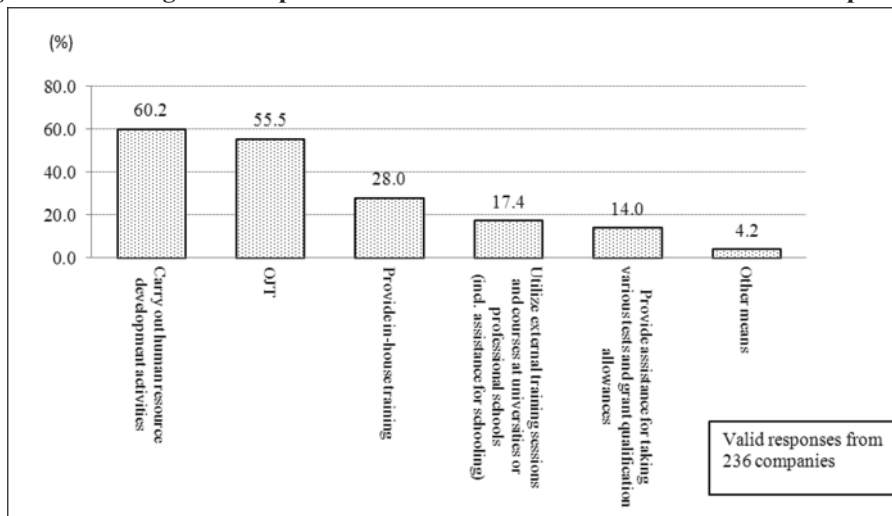
Percentage of those with cancelled contracts = Number of those with cancelled contracts / (Number of contract workers + Number of those with cancelled contracts) × 100

Number of mid-career workers = Number of those newly hired - Number of new graduates who were newly hired

5. Human resource development

- Companies that carried out human resource development activities accounted for 60.2%. Of them, 55.0% provided OJT and 28.0% provided in-house training.

Fig. 4-9 Percentage of Companies that Carried Out Human Resource Development Activities

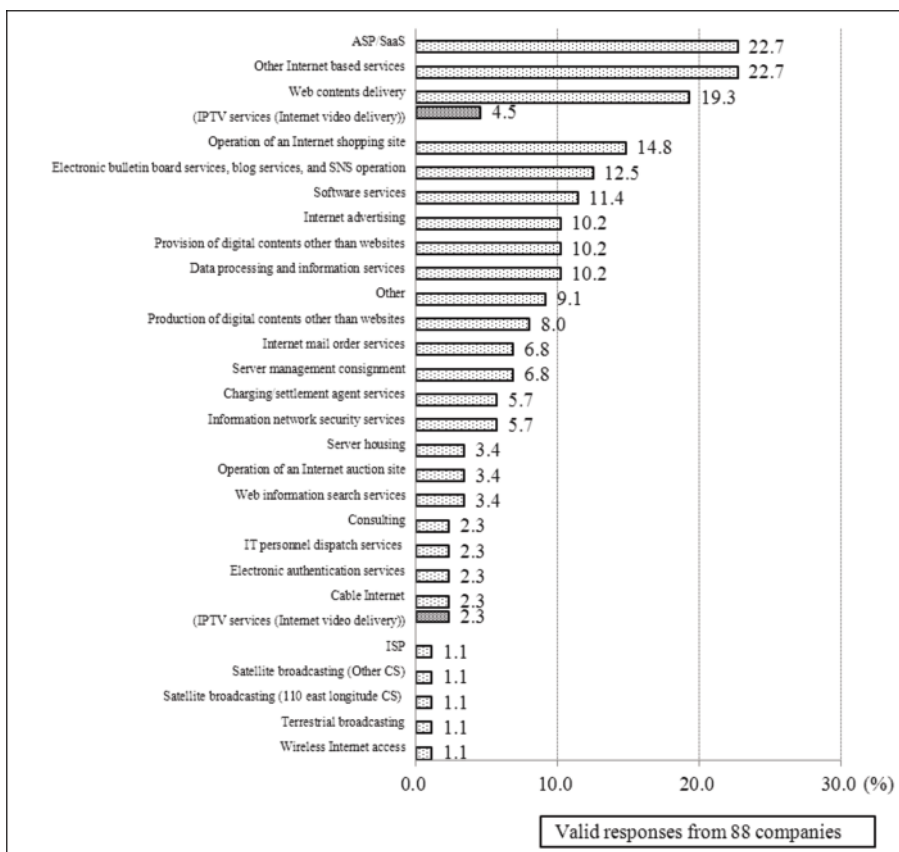


(Note) Multiple answers were allowed for activity contents.

6. New business fields

- Regarding new business fields that companies intend to start in the future, the most common answers were “ASP/SaaS” and “other Internet based services” (22.7%), followed by “web contents delivery” (19.3%) and “operation of an Internet shopping site” (14.8%).

Fig. 4-10 New Businesses that Companies Intend to Start in the Future (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 2,781 companies.

1. Number of companies and sales

- The number of companies with capital of 100 million yen to less than 1 billion yen accounted for nearly 50% of the total.
- The average of sales per company was 3.41 billion yen, out of which 7.8% were from overseas.
- Custom software service companies and data processing service companies altogether accounted for nearly 70% of the total number of companies and the overall sales of those engaged in the information service business. The overseas sales ratio was high for custom software service companies and game software service companies.

(Note) Data for Chapter 5 are compiled based on companies' main business, rated according to their business that generates the largest sales. (For example, when a company is engaged in the custom software service business and the data processing service business and its sales from the custom software service business are larger, the company is rated as a custom software service company.)

However, for the amount of sales in Fig. 5-1, data are also compiled based on companies' overall business activities and the sales for each business type are also tabulated.

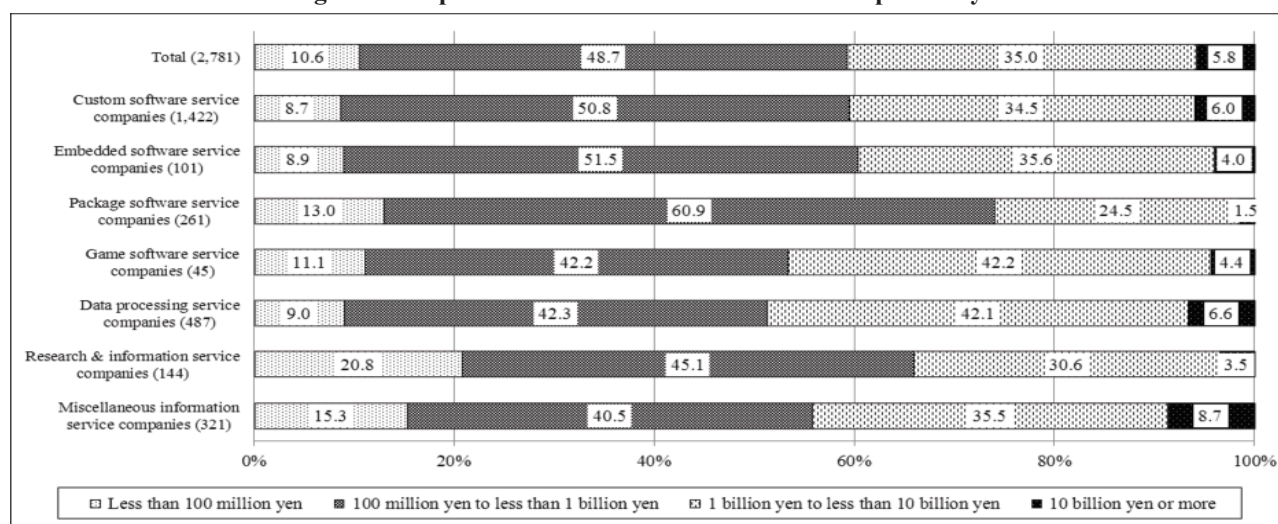
Fig. 5-1 Number of Companies and Sales by Business Type

(Unit: companies, million yen, %)

	Total									
	Composition ratio (%)	Custom software service companies	Embedded software service companies	Package software service companies	Game software service companies	Data processing service companies	Research & information service companies	Miscellaneous information service companies		
Number of companies	2,781	-	1,422	101	261	45	487	144	321	
Composition ratio (%)	100.0	-	51.1	3.6	9.4	1.6	17.5	5.2	11.5	
Sales	9,483,306	100.0	4,189,067	247,959	319,370	122,013	2,491,739	575,277	1,537,881	
Composition ratio (%)	100.0	-	44.2	2.6	3.4	1.3	26.3	6.1	16.2	
Activities	Custom software services (1,906)	4,120,260	43.4	3,346,425	28,081	24,713	2,171	412,409	135,828	170,633
	Embedded software services (268)	281,969	3.0	66,434	203,318	817	230	9,469	44	1,657
	Package software services (638)	575,252	6.1	90,469	2,774	262,613	52	154,926	761	63,657
	Game software services (57)	120,870	1.3	205	791	50	119,075	502	133	114
	Data processing services (895)	2,265,879	23.9	431,434	2,886	13,003	2	1,802,026	824	15,704
	Research & information services (230)	457,859	4.8	25,762	129	3,973	299	8,317	418,515	864
	Miscellaneous services (767)	1,661,217	17.5	228,338	9,980	14,201	184	104,090	19,172	1,285,252
	From overseas (363)	738,666	-	450,629	18,371	18,523	12,185	119,630	20,956	98,372
Percentage (%)	7.8	-	10.8	7.4	5.8	10.0	4.8	3.6	6.4	
Sales per company	3,410.0	-	2,945.9	2,455.0	1,223.6	2,711.4	5,116.5	3,995.0	4,790.9	

(Note) Figures in parentheses represent the number of companies engaged in some way in the relevant service business.

Fig. 5-2 Composition Ratios of the Number of Companies by Sales



2. Outsourcing for development and production

- Companies that implemented outsourcing accounted for 74.4%. The percentage was high for game software service companies.
- The average outsourcing cost per company was 0.98 billion yen, and 2.5% of the total was outsourced overseas. Regarding outsourcing overseas, 80.5% was outsourced to Asian countries, out of which 62.8% was to China.
- Per company, 232.6 pieces of work were outsourced, on average. Sales-based payment was adopted in 19.2% of the overall cases and the percentage was high for custom software service companies and package software service companies.

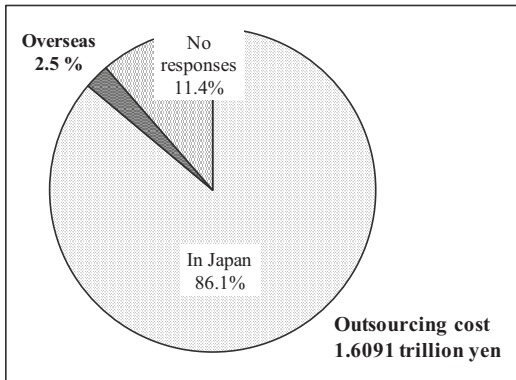
Fig. 5-3 Status of Business Outsourcing

(Unit: companies, million yen, %)

	Total	Custom software service companies	Embedded software service companies	Package software service companies	Game software service companies	Data processing service companies	Research & information service companies	Miscellaneous information service companies
Number of companies that answered whether or not they implemented outsourcing	2,222	1,380	98	256	44	301	27	116
Number of companies that implemented outsourcing	1,654	1,083	61	148	40	216	20	86
Percentage (%)	74.4	78.5	62.2	57.8	90.9	71.8	74.1	74.1
Number of companies that provided their outsourcing cost	1,636	1,072	59	147	40	214	20	84
Outsourcing cost	1,609,091	1,052,396	50,101	27,872	26,878	208,014	124,510	119,320
In Japan	1,384,663	978,389	47,621	25,391	8,774	201,973	11,335	111,180
Percentage (%)	86.1	93.0	95.0	91.1	32.6	97.1	9.1	93.2
Overseas	40,461	26,976	2,480	2,481	311	6,041	15	2,157
Percentage (%)	2.5	2.6	5.0	8.9	1.2	2.9	0.0	1.8
Outsourcing cost per company	983.6	981.7	849.2	189.6	672.0	972.0	6,225.5	1,420.5

Fig. 5-4 Outsourcing Overseas

【Percentage of outsourcing in Japan and overseas】



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

【Breakdown of outsourcing overseas】

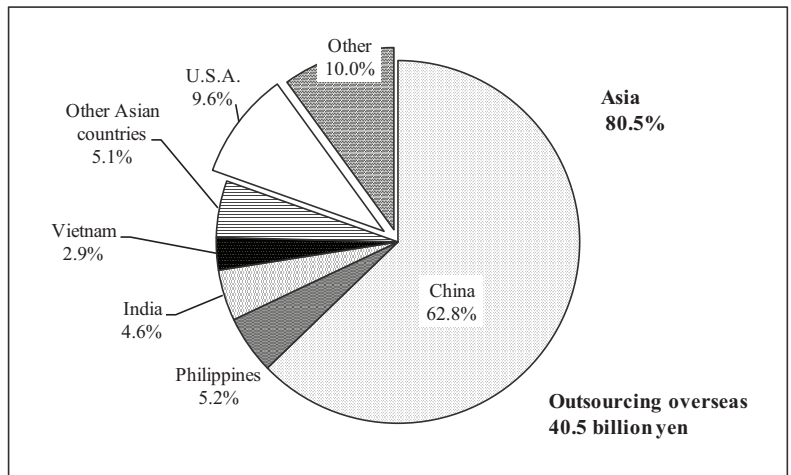
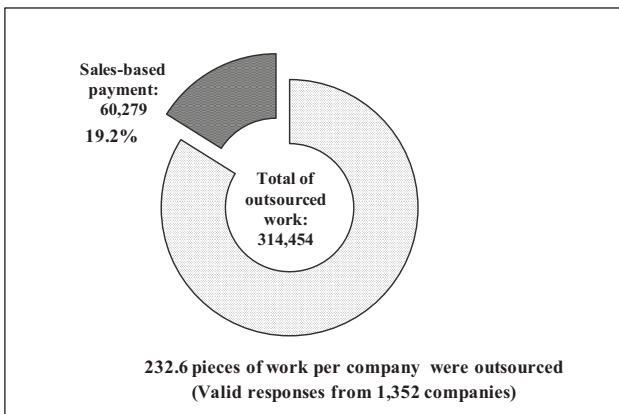
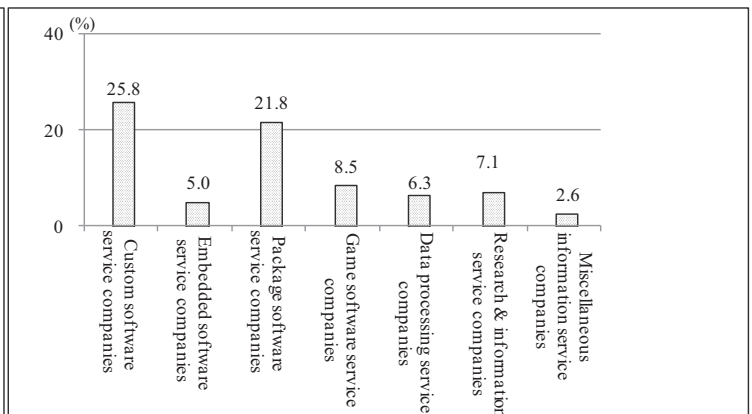


Fig. 5-5 Outsourced Work and Percentage of Sales-Based Payment

【Outsourced work】



【Percentage of sales-based payment by business type】



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

3. Acceptance of commissioned work for development and production

- Companies that accepted work commissioned by other companies accounted for 89.2%. The percentage was high for custom software service companies and embedded software service companies and was low for package software service companies.
- The average amount of accepted commissioned work per company was 2.15 billion yen. Of the total, 0.1% was commissioned from overseas. By region, 47.6% was from Asia, out of which 33.6% was from China. The amount commissioned from the United States accounted for 26.3%.
- The amount that companies accepted as the primary contractor accounted for 49.9% of the total. The percentage was high for research and information service companies, and game software service companies. Companies accepted 27.7% of the total amount as the first subcontractor and such a percentage was high for data processing service companies.

Fig. 5-6 Acceptance of Commissioned Work

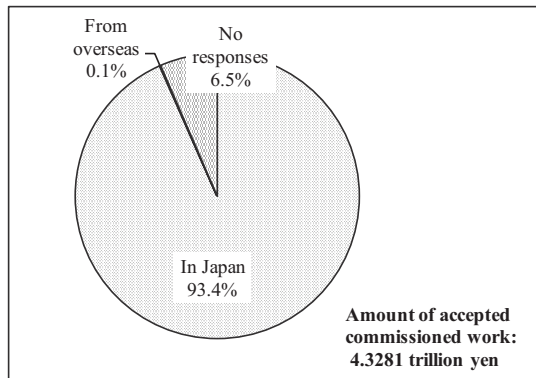
(Unit: companies, million yen, %)

	Total	Custom software service companies	Embedded software service companies	Package software service companies	Game software service companies	Data processing service companies	Research & information service companies	Miscellaneous information service companies
Number of companies that answered whether or not they accepted commissioned work	2,272	1,412	99	259	44	304	29	125
Number of companies that accepted commissioned work	2,027	1,412	97	102	32	251	21	112
Percentage (%)	89.2	100.0	98.0	39.4	72.7	82.6	72.4	89.6
Number of companies that provided the amount of commissioned work they accepted	2,010	1,402	94	102	32	247	21	112
Amount of commissioned work they accepted	4,328,103	3,396,781	134,045	34,295	24,149	407,783	141,181	189,869
In Japan	4,040,396	3,121,756	133,514	33,630	23,244	407,344	141,181	179,727
Percentage (%)	93.4	91.9	99.6	98.1	96.3	99.9	100.0	94.7
From overseas	5,981	3,104	531	665	905	439	-	337
Percentage (%)	0.1	0.1	0.4	1.9	3.7	0.1	-	0.2
Amount of acceptance per company	2,153.3	2,422.8	1,426.0	336.2	754.7	1,650.9	6,722.9	1,695.3

Fig. 5-7 Acceptance of Commissioned Work from Overseas

【Percentage of acceptance in Japan and overseas】

【Breakdown of acceptance from overseas】



(Note) Including companies that gave no responses regarding from where they accepted the work.

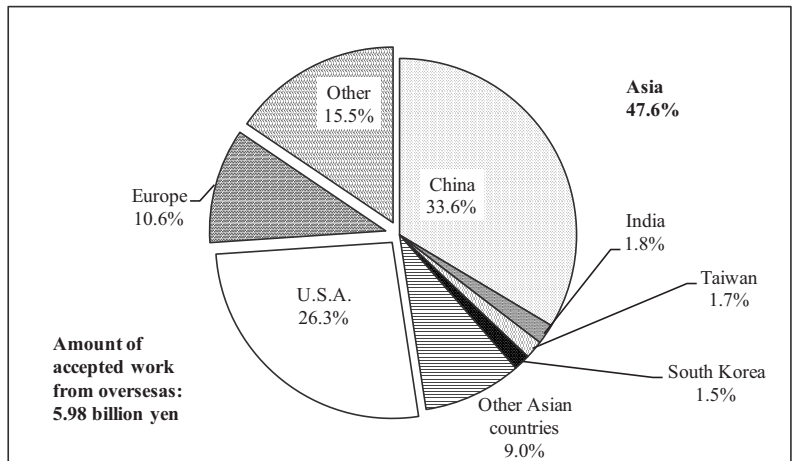
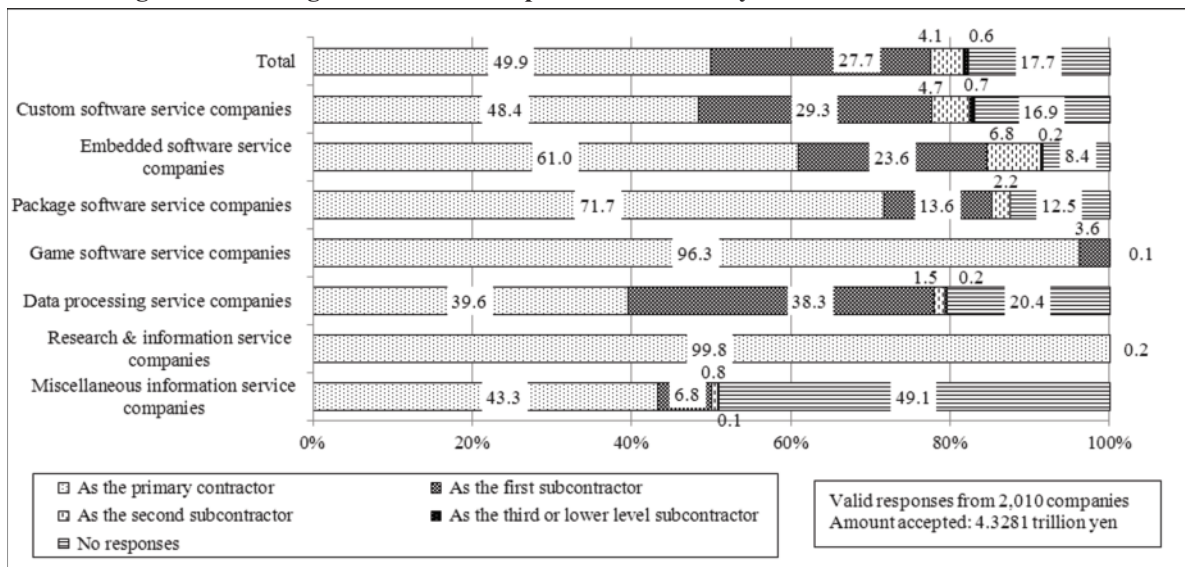


Fig. 5-8 Percentage of Amount Accepted as the Primary Contractor or a Subcontractor



4. Number of workers in the development and production section

- The average number of regular workers per company was 162, out of which 150 were full-time workers.
- Full-time workers accounted for 92.3% of the overall regular workers. Contract workers accounted for only 2.6%, but the percentage was rather high for game software service companies. Foreign full-time workers and foreign contract workers accounted for 1.5% and 0.1%, respectively, out of which over 50% were Chinese.
- The rate of those newly hired was higher than that of resignees (those with cancelled contracts), both for full-time workers and contract workers. Regarding foreign workers, the rate of those newly hired was lower both for full-time workers and contract workers. The percentage of mid-career workers was high for contract workers.

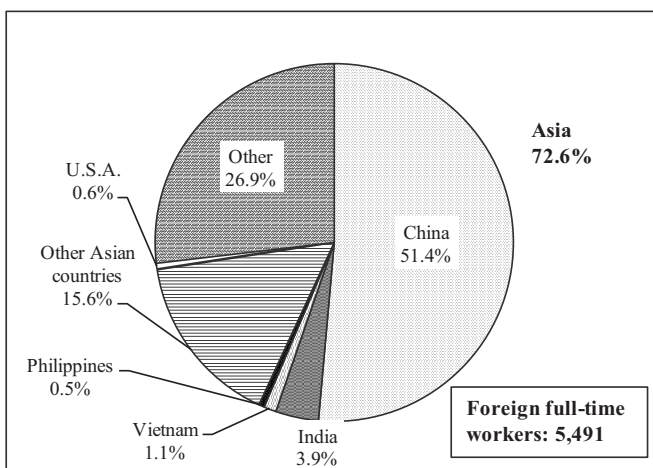
Fig. 5-9 Number of Workers in the Development and Production Section

(Unit: companies, persons, %)

	Total															
	Composition ratio (%)	Custom software service companies	Composition ratio (%)	Embedded software-service companies	Composition ratio (%)	Package software service companies	Composition ratio (%)	Game software service companies	Composition ratio (%)	Data processing service companies	Composition ratio (%)	Research & information service companies	Composition ratio (%)	Miscellaneous information service companies	Composition ratio (%)	
Number of companies that provided valid responses	2,278	-	1,413	-	99	-	261	-	45	-	306	-	29	-	125	-
Number of regular workers	369,679	100.0	239,140	100.0	24,592	100.0	15,267	100.0	5,625	100.0	56,975	100.0	6,288	100.0	21,792	100.0
Full-time workers	341,154	92.3	224,178	93.7	23,847	97.0	14,172	92.8	4,285	76.2	49,153	86.3	5,821	92.6	19,698	90.4
Foreign workers	5,491	1.5	4,250	1.8	183	0.7	333	2.2	85	1.5	291	0.5	60	1.0	289	1.3
Part-timers	8,045	2.2	2,251	0.9	120	0.5	414	2.7	190	3.4	4,755	8.3	38	0.6	277	1.3
Workers transferred to other companies	8,705	2.4	6,019	2.5	232	0.9	85	0.6	45	0.8	827	1.5	370	5.9	1,127	5.2
Contract workers	9,783	2.6	5,385	2.3	281	1.1	511	3.3	1,055	18.8	2,164	3.8	22	0.3	365	1.7
Foreign workers	417	0.1	298	0.1	8	0.0	12	0.1	15	0.3	80	0.1	-	-	4	-
Temporary or daily workers	1,963	-	736	-	21	-	20	-	10	-	658	-	4	-	514	-
Dispatched workers	37,123	-	23,212	-	1,897	-	1,660	-	237	-	6,656	-	1,659	-	1,802	-
Number of regular workers per company	162	-	169	-	248	-	58	-	125	-	186	-	217	-	174	-
Full-time workers	150	-	159	-	241	-	54	-	95	-	161	-	201	-	158	-

Fig. 5-10 Foreign Full-time Workers and Contract Workers

【Foreign full-time workers】



【Foreign contract workers】

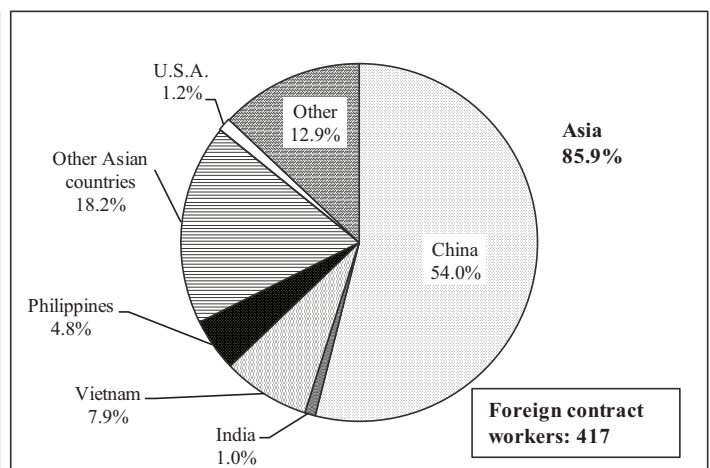


Fig. 5-11 Those Newly Hired and Resignees (Those with Cancelled Contracts)

(Unit: persons, %)

	Full-time workers			Foreign full-time workers	
		Composition ratio (%)	Percentage of those newly hired and resignees (%)		Percentage of those newly hired and resignees (%)
Number of those newly hired	20,495	100.0	5.8	796	12.5
New graduates	13,966	68.1	3.9	-	-
Mid-career workers	6,529	31.9	1.8	-	-
Number of resignees	14,947	-	4.2	882	13.8
Number of full-time workers + Number of resignees	356,101	-	-	6,373	-

(Note) 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
 Number of mid-career workers = Number of those newly hired - Number of new graduates who were newly hired

(Unit: persons, %)

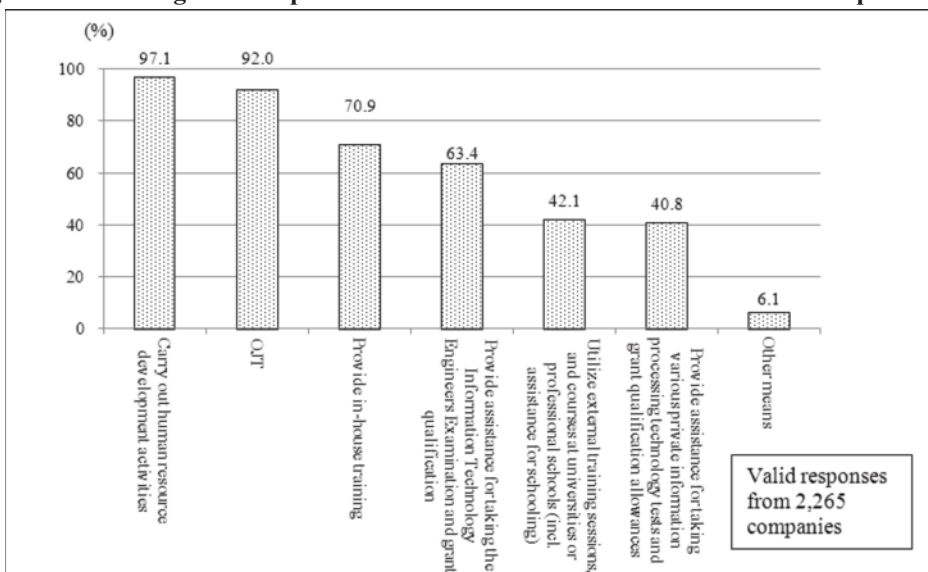
	Contract workers			Foreign contract workers	
		Composition ratio (%)	Percentage of those newly hired and those with cancelled contracts (%)		Percentage of those newly hired and those with cancelled contracts (%)
Number of those newly hired	1,854	100.0	16.4	95	16.9
New graduates	103	5.6	0.9	-	-
Mid-career workers	1,751	94.4	15.4	-	-
Number of those with cancelled contracts	1,551	-	13.7	144	25.7
Number of contract workers + Number of those with cancelled contracts	11,334	-	-	561	-

(Note) 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
 Number of mid-career workers = Number of those newly hired - Number of new graduates who were newly hired

5. Human resource development in the development and production section

- Companies that carried out human resource development activities accounted for 97.1%. Of them, 92.0% provided OJT, 70.9% provided in-house training, and 63.4% provided assistance for taking the Information Technology Engineers Examination and granted qualification allowances.
- The percentages of companies using IT Skill Standards (ITSS), the Embedded Technology Skill Standards (ETSS), and the Users' Information Systems Skill Standards (UISS) were 29.5%, 6.1%, and 4.5%, respectively.
- Regarding university-related business operations, 14.6% carried out business-academia collaborations, 4.9% provided employee training by utilizing universities, and 25.5% offered cooperation for university education.

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



(Note) Multiple answers are allowed for activity contents.

Fig. 5-13 Percentage of Companies Using Skill Standards

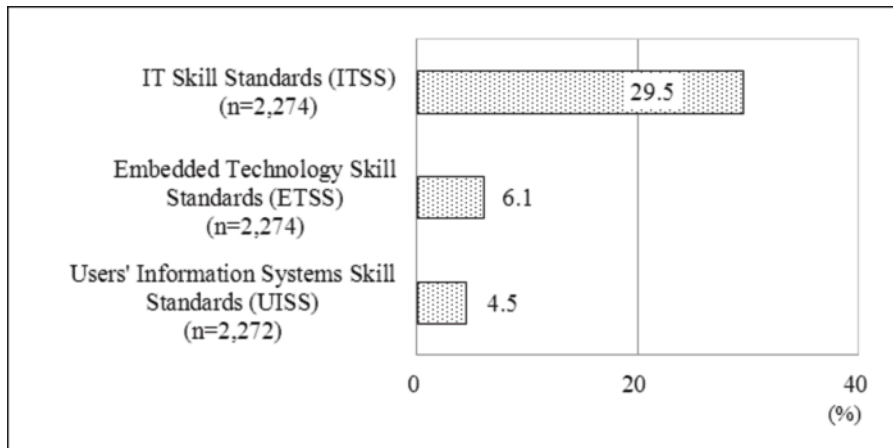


Fig. 5-14 University-related Business Operations

(Unit: companies, %)

	Business-academia collaboration	Composition ratio (%)	Employee training by utilizing universities	Composition ratio (%)	Cooperation for university education	
					Composition ratio (%)	Composition ratio (%)
Number of companies that provided valid responses	2,278	100.0	2,277	100.0	2,277	100.0
Implementing	333	14.6	112	4.9	581	25.5
Going to expand it	84	3.7	15	0.7	51	2.2
Going to maintain the status quo	214	9.4	93	4.1	463	20.3
Going to downsize it (incl. withdrawal)	35	1.5	4	0.2	67	2.9
Not implementing	1,945	85.4	2,165	95.1	1,696	74.5
Going to start doing so	45	2.0	18	0.8	23	1.0
Now considering doing so	339	14.9	270	11.9	284	12.5
Have no plans to do so	1,561	68.5	1,877	82.4	1,389	61.0

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

This Chapter shows the results of the Survey on Items for Each Business Type (Video Picture, Sound Information, Character Information Production and Distribution) based on valid responses from 360 companies.

1. Number of companies and sales

- The average of sales per company was 4.58 billion yen.
- The sales of other publishers (i.e. those other than newspaper publishers) accounted for 38.7%. The average of sales per company was 9.33 billion yen for motion picture, video and television program distribution companies and 6.59 billion yen for newspaper publishers.
- By sales, among other publishers, those with sales of 1 billion yen to less than 10 billion yen accounted for 52.5%. Among motion picture, video and television program distribution companies, 33.3% had sales of 10 billion yen or more.

(Note) Data for Chapter 6 are compiled based on companies' main business, rated according to their business that generates the largest sales. (For example, when a company operates both as a newspaper publisher and other publisher and its sales from the newspaper publishing business are larger, the company is rated as a newspaper publisher.)

However, for the amount of sales in Fig. 6-1, data are also compiled based on companies' overall business activities, and the sales for each business type are also tabulated.

Fig. 6-1 Number of Companies and Sales by Business Type

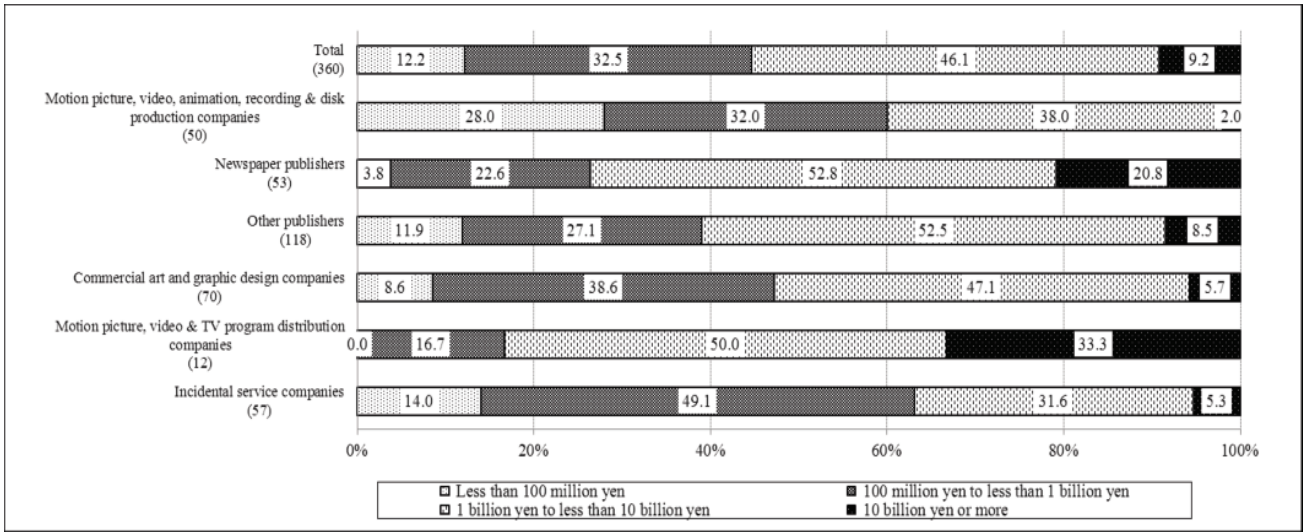
(Unit: companies, million yen, %)

		Total								
		Composition ratio (%)	Motion picture, video, animation, recording & disk production companies	Newspaper publishers	Other publishers	Commercial art and graphic design companies	Motion picture, video & TV program distribution companies	Incidental service companies		
Number of companies		360	—	50	53	118	70	12	57	
Composition ratio (%)		100.0	—	13.9	14.7	32.8	19.4	3.3	15.8	
Sales		1,649,455	100.0	75,880	349,274	637,602	368,466	112,014	106,219	
Composition ratio (%)		100.0	—	4.6	21.2	38.7	22.3	6.8	6.4	
Activities	Content production section	Motion picture & video production (61)	41,006	2.5	33,818	—	410	457	4,748	1,573
		Animation production (16)	35,189	2.1	33,423	—	258	1,500	—	8
		Recording and disk production (6)	4,147	0.3	4,145	—	—	—	—	2
		Newspaper publishers (59)	335,021	20.3	—	333,026	1,687	—	—	308
		Other publishers (148)	635,509	38.5	106	2,429	630,724	264	1,927	59
	Commercial art and graphic design (95)	387,454	23.5	25	13,450	2,602	366,210	5,038	129	
	Motion picture, video & TV program distribution (16)	98,731	6.0	1,681	71	—	—	96,979	—	
	News syndicates (8)	21,408	1.3	—	28	—	—	—	21,380	
	Other (81)	90,990	5.5	2,682	270	1,921	35	3,322	82,760	
Average sales per company		4,581.8	—	1,517.6	6,590.1	5,403.4	5,263.8	9,334.5	1,863.5	

(Note) Figures in parentheses represent the number of companies engaged in some way in the relevant service business.

"Other" refers to miscellaneous services incidental to video picture, sound information, character information production and distribution.

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



2. Business operation

- Regarding business operation, 57.0% of the companies were already engaged in publication (magazines, newspapers, e-publishing, etc.), and 39.9% in commercial message production, and commercial art and graphic design. Of the total number of companies, 36.7% expressed their intention to start delivery to mobile devices (mobile phones, mobile AV equipment, etc.) within one year. Those intending to newly start publication (magazines, newspapers, e-publishing, etc.) and delivery through the Internet accounted for 20.0%, respectively.

Fig. 6-3 Business Operation (Already Doing It) (multiple answers allowed)

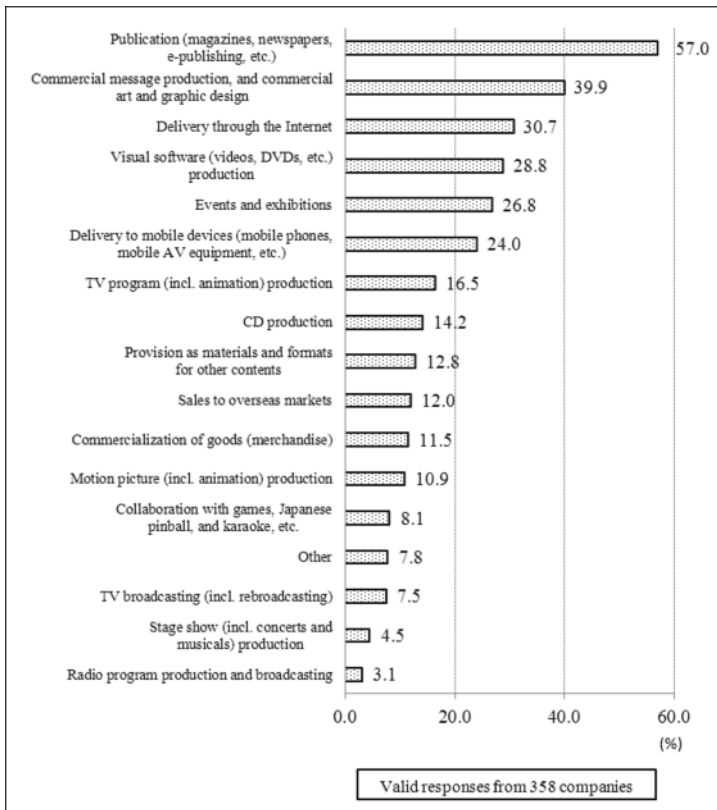
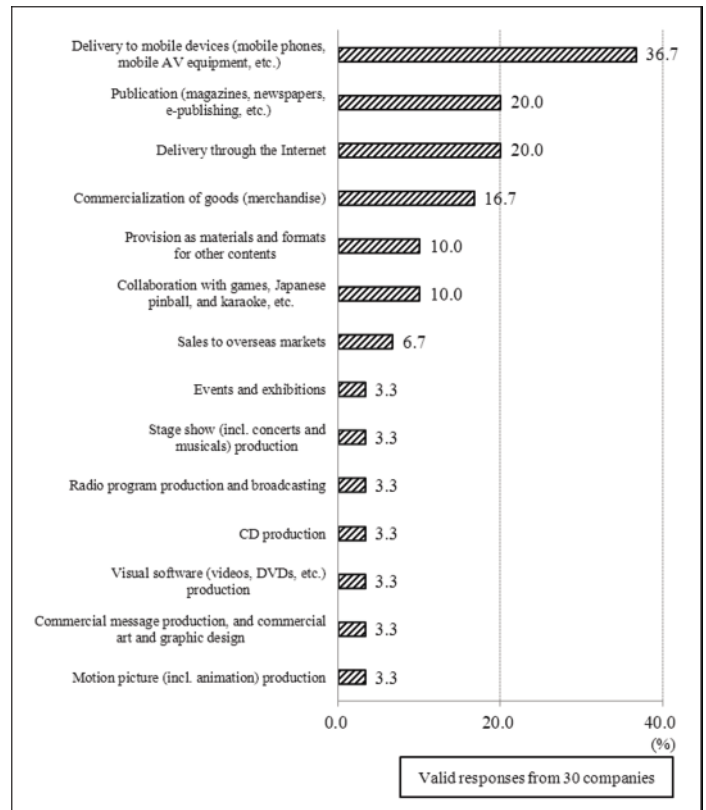


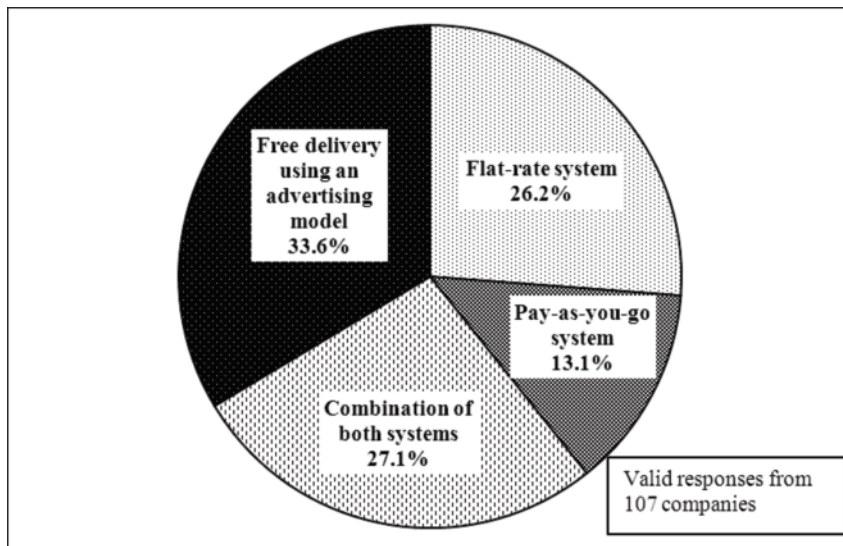
Fig. 6-4 Business Operation (Plan to Start It Within One Year) (multiple answers allowed)



3. Charge system

- With regard to charge systems for the video picture and music delivery services, free delivery using an advertising model was most common at 33.6%, followed by the flat-rate system at 26.2% and the pay-as-you-go system at 13.1%.

Fig. 6-5 Charge System for Video Picture and Music Delivery Services



4. Content production and outsourcing in the development and production section

- On average, each company produced 132.0 pieces of contents.
- Looking at the rights held concerning produced contents, 76.1% of the companies held the full rights for primary use, and 62.1% held the full right for the secondary use. In both cases, companies holding 100% of the rights were the largest in number.
- The percentage of outsourcing to long-term transaction partners was 39.4%, and the percentage of completely outsourced work was 20.7%. Among the overall outsourced work, 1.0% was outsourced overseas. The average of outsourcing cost per company was 0.72 billion yen.
- Each company outsourced 89.6 pieces of contents, on average. By type of business, other publishers each outsourced 128.2 pieces of contents, on average, which was the largest in number.
- Sales-based payment was adopted in 7.1% of outsourced content production work.

Fig. 6-6 Number of Contents Produced by Business Type

(Unit: companies, pieces, %)

	Total	Motion picture, video, animation, recording & disk production companies	Newspaper publishers	Other publishers	Commercial art and graphic design companies	Motion picture, video & TV program distribution companies	Incidental service companies
Number of companies that provided valid responses	231	49	51	111	9	4	7
Composition ratio (%)	100.0	21.2	22.1	48.1	3.9	1.7	3.0
Number of contents produced	30,503	5,130	609	24,253	180	255	76
Composition ratio (%)	100.0	16.8	2.0	79.5	0.6	0.8	0.2
Number of contents produced per company	132.0	104.7	11.9	218.5	20.0	63.8	10.9

Fig. 6-7 Rights for Primary Use and Secondary Use

(Unit: pieces, %)

	Total	Composition			
		100%	50% or more to less than 100%	0% or more to less than 50%	0% (Holding no rights)
Rights concerning the primary use	29,027	22,076	1,359	466	5,126
Composition ration (%)	100.0	76.1	4.7	1.6	17.7
Rights concerning the secondary use	25,471	15,807	1,633	1,030	7,001
Composition ration (%)	100.0	62.1	6.4	4.0	27.5

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

Fig. 6-8 Status of Business Outsourcing by Business Type

(Unit: companies, million yen, %)

	Total	Business Type					
		Motion picture, video, animation, recording & disk production companies	Newspaper publishers	Other publishers	Commercial art and graphic design companies	Motion picture, video & TV program distribution companies	Incidental service companies
Number of companies that answered whether or not they implemented outsourcing	239	50	53	116	9	4	7
Number of companies that implemented outsourcing	141	33	18	75	7	4	4
Percentage (%)	59.0	66.0	34.0	64.7	77.8	100.0	57.1
Number of companies that provided their outsourcing cost	127	27	18	67	7	4	4
Outsourcing cost	90,883	17,454	11,186	57,977	2,465	1,737	64
To long-term outsourcing partners	35,774	8,532	1,486	22,715	2,295	736	10
Percentage (%)	39.4	48.9	13.3	39.2	93.1	42.4	15.6
Completely outsourced work	18,834	6,380	2,091	10,347	—	11	5
Percentage (%)	20.7	36.6	18.7	17.8	—	0.6	7.8
To overseas	888	850	—	17	—	21	—
Percentage (%)	1.0	4.9	—	0.0	—	1.2	—
Outsourcing cost per company	715.6	646.4	621.4	865.3	352.1	434.3	16.0

Fig. 6-9 Number of Contents Outsourced per Company (top three company types)

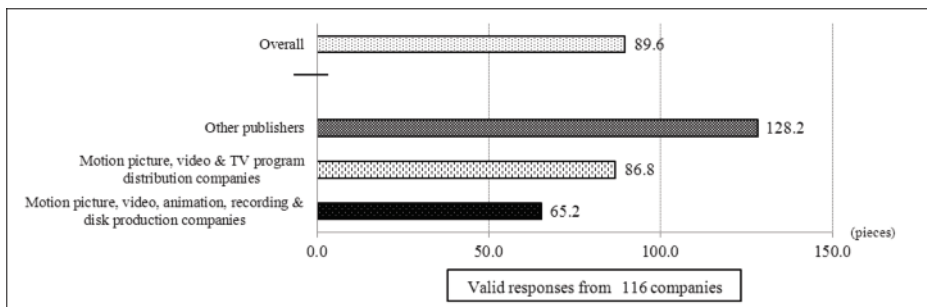
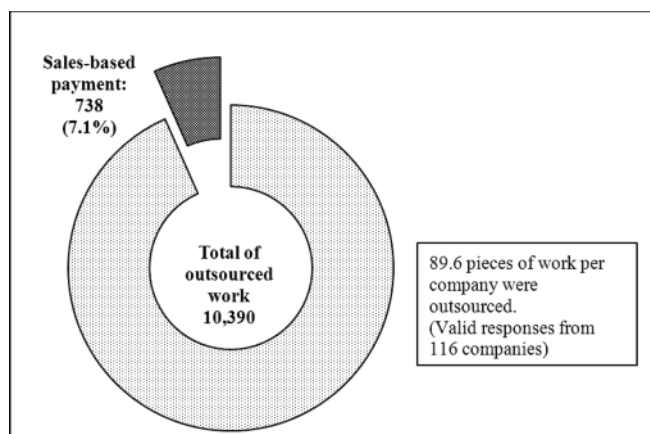


Fig. 6-10 Number of Contents Outsourced and Percentage of Sales-based Payment



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

5. Number of workers and human resource development in the development and production section

- The average number of regular workers per company was 118.
- Among regular workers, 75.1% were full-time workers. Contract workers accounted for 18.1% and the percentage of contract workers was high for other publishers, at 26.5%.
- The rate of full-time workers newly hired was 2.6% and that of resignees was 3.5%, while the rate of contract workers newly hired was 7.7% and that of those with cancelled contracts was 24.8%. In both cases, the rate of those newly hired was lower. The rate of those with cancelled contracts was higher than that of resigned full-time workers.
- Companies that carried out human resource development activities accounted for 89.3%. Companies that provided OJT accounted for 79.1%, while 41.5% provided in-house training.

Fig. 6-11 Number of Workers in the Development Section

(Unit: companies, persons, %)

	Total													
	Composition ratio (%)	Motion picture, video, animation, recording & disk production companies	Composition ratio (%)	Newspaper publishers	Composition ratio (%)	Other publishers	Composition ratio (%)	Commercial art and graphic design companies	Composition ratio (%)	Motion picture, video & TV program distribution companies	Composition ratio (%)	Incidental service companies	Composition ratio (%)	
Number of companies that provided valid responses	239	-	50	-	53	-	117	-	8	-	4	-	7	-
Number of regular workers	28,229	100.0	2,591	100.0	9,976	100.0	14,675	100.0	180	100.0	305	100.0	502	100.0
Full-time workers	21,198	75.1	1,945	75.1	8,472	84.9	9,937	67.7	172	95.6	301	98.7	371	73.9
Part-timers	1,098	3.9	15	0.6	405	4.1	576	3.9	1	0.6	2	0.7	99	19.7
Workers transferred to other companies	536	1.9	16	0.6	372	3.7	146	1.0	-	-	2	0.7	-	-
Contract workers	5,121	18.1	614	23.7	575	5.8	3,893	26.5	7	3.9	-	-	32	6.4
Temporary or daily workers	231	-	7	-	33	-	173	-	3	-	-	-	15	-
Dispatched workers	700	-	51	-	188	-	384	-	1	-	-	-	76	-
Number of regular workers per company	118	-	52	-	188	-	125	-	23	-	76	-	72	-
Full-time workers	89	-	39	-	160	-	85	-	22	-	75	-	53	-

Fig. 6-12 Those Newly Hired and Resignees (Those with Cancelled Contracts)

(Unit: persons, %)

	Full-time workers		
	Composition ratio (%)	Percentage of those newly hired and resignees (%)	
Number of those newly hired	564	100.0	2.6
New graduates	418	74.1	1.9
Mid-career workers	146	25.9	0.7
Number of resignees	766	-	3.5
Number of full-time workers + Number of resignees	21,964	-	-

(Note) 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

Number of mid-career workers = Number of those newly hired - Number of new graduates who were newly hired

(Unit: persons, %)

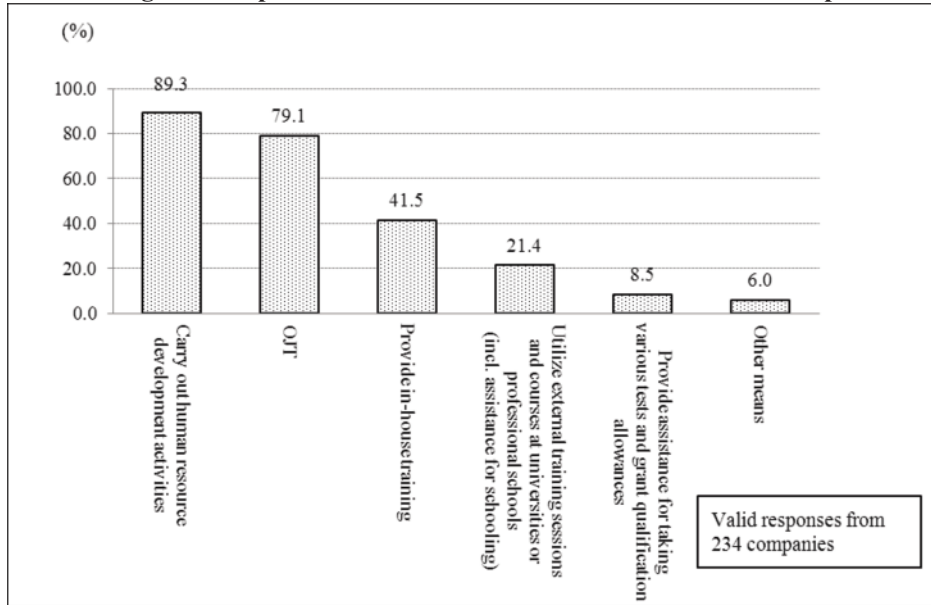
	Contract workers		
	Composition ratio (%)	Percentage of those newly hired and those with cancelled contracts (%)	
Number of those newly hired	526	100.0	7.7
New graduates	178	33.8	2.6
Mid-career workers	348	66.2	5.1
Number of those with cancelled contracts	1,686	-	24.8
Number of contract workers + Number of those with cancelled contracts	6,807	-	-

(Note) 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

Number of mid-career workers = Number of those newly hired - Number of new graduates who were newly hired

Fig. 6-13 Percentage of Companies that Carried Out Human Resource Development Activities



(Note) Multiple answers are allowed for activity contents.



2010 Basic Survey on the Information and Communications Industry (I)

(Common Survey)

(As of March 31, 2010)

- ☆ 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, 2010, for this survey and **enter the settlement results for fiscal 2009. 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, 2010.**

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, 2010)	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 2009	0104	(i) Circle the applicable number regarding the organizational restructuring after April 2009. 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 2009. 1. Merger 2. Spin-off 3. Selling out a part of businesses/assets to another company (business transfer) 4. Purchasing a part of businesses/assets from another company (business acceptance) 5. Other		
(6) Month of settlement	0105	Annual	(month)	Biannual	(month), (month)
(7) Consumption tax status (Check box if applicable)	0106	Tax excluded <input type="checkbox"/>	☆ In principle, please enter figures that include consumption tax. However, if it is difficult to provide tax-inclusive figures due to accounting reasons, check box and enter tax-exclusive figures.		

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

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2 Business Organization and Number of Workers

2010 Survey

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

(As of the fiscal year end)

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 "No. 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).

Number of workers transferred to other companies, etc.	(3)	0216	
--	-----	------	--

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

(Note) For "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.

(2) Number of other workers

(As of the fiscal year end)

Classification		Number of workers
Temporary or daily workers	0221	
Dispatched workers	0222	

3 Parent Company, Subsidiary and Affiliate Status

2010 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 FY2009)

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 FY2009)

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

(Note 1) Voting rights includes partially granted voting rights.

(Note 2) A subsidiary refers to a company in which your company owns more than 50% of the voting rights. It includes a company in which the subsidiary, or your company and the subsidiary combined, own more than 50% of the voting rights. It also includes a company that your company practically controls, even if your company owns 50% or less of the voting rights.

(Note 3) An affiliate refers to a company in which your company owns no less than 20% but no more than 50% of the voting rights. It also refers to a company that your company can seriously affect, even if your company owns less than 20% but no less than 15% of the voting rights.

(Note 4) Enter the industry classification number in accordance with the classification of the "Classification Table for the Basic Survey on the Information and Communications Industry."

(Note 5) If your company owns subsidiaries and affiliates, enter also Question 4(2) "Investment in affiliates" on page 4.

(Note 6) Do not include dormant companies.

(Note 7) If more space is required, use the supplementary paper provided in the "Guide for Completing the Survey" and attach to the left margin.

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

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

(FY2009)

(FY2009)

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

2010 Survey

(1) Assets, liabilities and net assets

(As of the end of FY2009)

Accounting item		million yen				Accounting item		million yen			
ASSETS	Current assets	0401				LIABILITIES AND NET ASSETS	Current liabilities	0401			
	Intangible asset	0402					Payable to related parties	0402			
	Fixed assets	0403					Shareholders' equity	0403			
	Tangible fixed assets	0404					Shareholders' equity (other than financial institutions)	0404			
	Other fixed asset	0405					Fixed liabilities	0405			
	Intangible fixed assets	0406					Corporate bonds (including convertible bonds)	0406			
	Other intangible	0407					Long-term borrowing financial institutions	0407			
	Investment and other assets	0408					Long-term borrowing other than financial institutions	0408			
	Deferred assets	0409					Capital	0409			
	Total assets	0410					Capital surplus	0410			
					Reserve surplus	0411					
					Reserves	0412					
					Other	0413					
					Total liabilities and net assets	0414					

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

(2) Investment in affiliates

(As of the end of FY2009)

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

(FY2009)

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

(4) Dividend status of surplus

(FY2009)

Classification		million yen			
Dividends (including interim dividends)	0453				

5 Business Performance

(1) Sales and expenses, etc.

(FY2009)

Accounting item		million yen			
Sales	0501				
Cost of sales	0502				
	0503				
Sales and general administrative expenses	0504				
	0505				
Non-operating income	0506				
	0507				
Non-operating expenses	0508				
	0509				
Provision for bad debts and loss	0510				
Current net profit	0511				

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

(FY2009)

Accounting item		million yen			
Advertising expenses	0511				
Packaging and transportation expenses	0512				
Depreciation costs	0513				
Direct expenses (excluding information processing)	0514				
Media expenses (incl. telephone charges)	0515				
Residence and travel expenses (incl. travel)	0516				
Tax and profit 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

(FY2009)

Accounting item		million yen			
Information processing and communication expenses	0520				

(Note) Information processing and communication expenses = "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

(FY2009)

Accounting item		million yen			
Lease payments	0530				

Companies with capital of 500 million yen or more, submitting the Ministry of Finance's "Financial Statements Statistics of Corporations by Industry" annual survey form do not need to enter the colored survey items (0401, 0423, 0451, 0502, 0508, and 0513, 0517)

(5) Breakdown of sales

Enter the breakdown of "Sales (0501)" in the following sections ① and ② in terms of the main items or businesses, as well as their values, in accordance with the item or business classifications of the "Classification Table for the Basic Survey on the Information and Communications Industry," and in descending order of sales or revenue amount. **Bring all relevant items together under each classification number.** In each of ① and ②, the total sales or income value should equal the sum of the breakdown. Also, the total of the sales and income values for ① and ② should equal "Sales (0501)."

① Company's income from the information and communications business (FY2009)

Classification no.	Main items	million yen			
0531 Sales (in descending order)					
	9 9 1	Other			
	Total				

(Note) The relevant classification numbers are:
"Information and communications"..... 371—419

② Other business income (FY2009)

Classification no.	Main items	million yen			
0532 Sales (in descending order)					
	9 9 2	Other			
	Total				

(Note) The relevant classification numbers are:
"Services"..... 702—710
726—746
781—809
880—929
"Wholesale"..... 511—559
"Retail"..... 570—610
"Accommodation"..... 750
"Eating and drinking services".... 760, 766, 770
"Mining"..... 051
"Manufacturing"..... 091—320
"Electricity, gas, heat supply, waterworks"
..... 331—360
"Finance and insurance" 621, 643
"Medical and welfare"..... 830
"Education and learning support"
..... 811, 824
"Agriculture, forestry and fisheries"
..... 010—030
"Construction" 060
"Transportation" 440—480
"Real estate" 680—693
"Compound services"..... 860, 870

• For the service business, enter the breakdown of operating revenue, etc.
• Enter "Wholesale" and "Retail" separately, even for the same product, in accordance with their respective classification numbers.

(Note 1) For each of ① and ②, item or business breakdown values must be classified and entered **until they exceed 95%** of the overall sales or income value.

(Note 2) For the remainder, if it is broken down into many items or businesses, classification of each is not necessary and they can be lumped together under "991 Other" and "992 Other."

(Note 3) If more space is required, use the supplementary paper provided in the "Guide for Completing the Survey" and attach to the left margin.

6 Business Conditions

2010 Survey

(1) Sales conditions

(FY2009)

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

(FY2009)

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

(FY2009)

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

(FY2009)

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

(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

(FY2009)

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

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

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

(Note) Companies with capital of one billion yen or more, and submitting the Ministry of Internal Affairs and Communications' Scientific and Technological Research survey form, do not need to enter the colored survey items (0802 ~ 0805).

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

(3) Capacity development expenses

(FY2009)

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 FY2009)

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**

(FY2009)

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

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

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

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

② Payment

(FY2009)

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

10 Direction of Corporate Management (As of the fiscal year end)(1) Number of directors

Enter the number of directors in your company.

In-house directors	External directors	Affiliates

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

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

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

 1. Yes 2. No

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

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



2010 Basic Survey on the Information and Communications Industry (II)

(Telecommunications and Broadcasting)

(As of March 31, 2010)

- ☆ 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, 2010, for this survey and **enter the settlement results for fiscal 2009. 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, 2010.**

1 Company Profile

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

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

2 Business Performance

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

1	Telecommunications	2	Broadcasting	3	Cable television broadcasting
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3 Financial Status

(1) Fund procurement and fund management

Enter the status of procurement and management of long-term funds, on the basis of the net increase or decrease by category (see "Guide for Completing the Survey for 2010 Basic Survey on the Information and Communications Industry (II) (Telecommunications and Broadcasting)").

< On the whole-company basis >

Category		FY2009 Performance					FY2010 Forecast				
		million yen					million yen				
Long-term fund management	Funds for acquisition and capital investment (a)										
	Investment and loan (b)										
	Transfer to short-term funds (c)										
	Total (a+b+c = d+e+f+g+h)										
Long-term fund procurement	Shares (d)										
	Bonds (e)										
	By the securitization of assets (f)										
	Borrowing (g)										
	From public-sector financial institutions										
	From private-sector financial institutions										
	Internal funds (h)										
Depreciation											

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

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

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

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

(2) Sales

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

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

① Sales by service for the telecommunications business

Classification		million yen						
1	Fixed voice transmission (Domestic)							
	IP phone service							
2	Fixed voice transmission (International)							
	IP phone service							
3	Fixed data transmission							
	ISP, ADSL, and other Internet access							
	IP-VPN							
	Wide Area Ethernet							
4	Mobile voice transmission							
5	Mobile data transmission							
6	PHS voice transmission							
7	PHS data transmission							
8	Radio paging							
9	Private							
	International							
10	Telegram							
11	Other telecommunication services ()							
12	Income from IRU contracts							
13	Total for FY2009							

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

(Note 2) An "IRU contract" refers to a long-term stable contract for the right to use lines that cannot be cancelled or terminated without an agreement among the related parties.

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 FY2009							

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

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 FY2009								

(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.

(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

< FY2009 >

Category	million yen							
Connection fees								

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

② Broadcasting business

< FY2009 >

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

< FY2009 >

Category	million yen							
Program purchase expenses								
Program production expenses								

(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	FY2009 Performance					FY2010 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	FY2009 Performance					FY2010 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	FY2009 Performance					FY2010 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 FY2009 >

(persons)

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

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

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

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

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

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

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

6 Status of Businesses Outsourcing

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

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

① Telecommunications business

1. Implemented outsourcing in FY2009 ⇒ Enter (2)
 2. Did not implement outsourcing ⇒ Go to 7

② Broadcasting business

1. Implemented outsourcing in FY2009 ⇒ Enter (2)
 2. Did not implement outsourcing ⇒ Go to 7

③ Cable television broadcasting business

1. Implemented outsourcing in FY2009 ⇒ 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

< FY2009 >

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

< FY2009 >

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

< FY2009 >

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	Server management consignment
2	FTTH services	24	Server housing
3	Wireless Internet access	25	Other Internet based services
4	Terrestrial broadcasting	26	ISP
5	Satellite communications	27	Software services
6	International communications	28	Data processing and information services
7	Satellite broadcasting (BS)	29	Production of digital contents other than websites
8	Satellite broadcasting (110 east longitude CS)	30	Provision of digital contents other than websites
9	Satellite broadcasting (Other CS)	31	IT personnel dispatch services
10	Cable television broadcasting	32	Consulting
11	Cable Internet	33	Internet mail order services
12	IPTV services (Internet video delivery)	34	Internet advertising
13	Web information search services	35	Information and telecommunications facility construction
14	Operation of an Internet shopping site	36	Information and telecommunications equipment sales
15	Operation of an Internet auction site	37	Equipment maintenance, repair, and management
16	Electronic bulletin board services, blog services, and SNS operation	38	Other (Enter business names) []
17	ASP/SaaS		
18	Web contents delivery		
19	IPTV services (Internet video delivery)		
20	Electronic authentication services		
21	Information network security services		
22	Charging/settlement agent services		



General
Statistics

2010 Basic Survey on the Information and Communications Industry (III)

(Broadcast Program Production)

(As of March 31, 2010)

- ☆ 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, 2010, for this survey and **enter the settlement results for fiscal 2009. 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, 2010.**

1 Company Profile

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

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

2 Business Performance

(1) Broadcast media for programs that your company produces

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

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

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

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

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

(Note 4) Including commercial messages.

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

(2) Types of programs that your company produces

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

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

(3) Contents of the program production business

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

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

(4) Other business details

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

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

3 Sales

(1) Sales from the program production business

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

Classification	FY2009 Performance				FY2010 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 (FY2009 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 (FY2009 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	FY2009 Performance						FY2010 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 FY2009)			
	Purchased		Rental	
	Digitalized ones	Digitalized ones	Digitalized ones	Digitalized ones
	(unit)	(unit)	(unit)	(unit)
VTRs				
Cameras				
Editing machines				

5 Workers

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

< As of the end of FY2009 >

(persons)

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

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

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

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

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

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

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

6 Number of Contracts for Broadcasting Programs, etc.

(1) How you start program production

Presuming the total number of program production-related contracts concluded in FY2009 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 FY2009, 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 FY2009, 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 FY2009				
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 FY2009.

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

1	Making the program into a video (incl. DVD, BD, and CD-ROM)	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 FY2009?

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 FY2009 ⇒ 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.

< FY2009 >

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

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

8 Business Operation

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

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

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

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

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

9 Future Business Operation

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

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

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

10 Management Problems

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

1	Low unit prices of orders	8	Improvement of facilities and equipment
2	Stability of orders	9	Digitalization of broadcasting
3	Securing of experienced and skilled workers	10	Procurement of funds
4	Improvement of capabilities to produce contents	11	High personnel cost
5	Enhancement of employee training	12	Lack of fairness and transparency in transaction practices with broadcast stations
6	Strengthening of marketing power	13	Procedures for licensing for the distribution of broadcasting programs
7	High equipment cost	14	Other (



2010 Basic Survey on the Information and Communications Industry (IV) (Internet Based Services)

(As of March 31, 2010)

- ☆ 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, 2010, for this survey and **enter the settlement results for fiscal 2009. 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, 2010.**

1 Company Profile

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

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

2 Sales

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

Classification		million yen							Percentage of advertising revenue
1	Web information search services								%
2	Internet shopping site operation services								%
3	Internet auction site operation services								%
4	Electronic bulletin board services, blog services, and SNS operation services								%
5	Web contents delivery services								%
5-1	Revenue from IPTV services								/
6	ASP/SaaS (excl. software development)								
7	Electronic authentication services								
8	Information network security services								
9	Charging/settlement agent services								
10	Server management consignment								
11	Other Internet based services ()								
12	Total sales of Internet based service business in FY2009								

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

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

(Note 3) "ASP" (Application service provider) and "SaaS" (Software as a service) refers to services to provide business software (application) through the Internet. ASP and SaaS do not include consistent services starting from the development of software.

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

3 Number of Registered Tenants and Customers

Enter the number of registered tenants and customers as of March 31, 2010.

< As of the end of FY2009 >

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

4 Amount of Acquisition and Capital Investment

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

Category	FY2009 Performance					FY2010 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 your Internet based service business.

1. Implemented outsourcing in FY2009 ⇒ Enter (2)
 2. Did not implement outsourcing ⇒ Go to 6

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

< FY2009 >

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

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

6 Workers

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

Internet based service business	Number of workers (As of the end of FY2009)	Newly hired full-time workers and contract workers (FY2009)		Resignees and those with cancelled contracts (FY2009)
			New graduates	
Regular workers (excl. temporary or daily workers)				
Full-time workers (excl. workers transferred to other companies)				
Part-timers				
Workers transferred to other companies				
Contract workers (incl. freelancers)				
Temporary or daily workers				
Dispatched workers				

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

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

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

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

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

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

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

7 Human Resource Development

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

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

8 Business Operation

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

- (1) Is your company now carrying out any business-academia collaboration? What are your future plans?
(ex. Joint development, joint production, consignment and acceptance of research, etc. with universities)
1. We are carrying out collaboration and are going to expand it.
 2. We are carrying out collaboration and are going to maintain the status quo.
 3. We are carrying out collaboration but are going to downsize it (incl. withdrawal).
 4. We are not carrying out collaboration, but are going to start doing so.
 5. We are not carrying out collaboration, but are now considering doing so.
 6. We are not carrying out collaboration, and have no plans to do so.

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

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

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

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

9 Efforts for Acquiring Certification

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

< As of the end of FY2009 >

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

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

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

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

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

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

10 Future Business Operation

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

1	DSL services	23	Server management consignment
2	FTTH services	24	Server housing
3	Wireless Internet access	25	Other Internet based services
4	Terrestrial broadcasting	26	ISP
5	Satellite communications	27	Software services
6	International communications	28	Data processing and information services
7	Satellite broadcasting (BS)	29	Production of digital contents other than websites
8	Satellite broadcasting (110 east longitude CS)	30	Provision of digital contents other than websites
9	Satellite broadcasting (Other CS)	31	IT personnel dispatch services
10	Cable television broadcasting	32	Consulting
11	Cable Internet	33	Internet mail order services
12	IPTV services (Internet video delivery)	34	Internet advertising
13	Web information search services	35	Other (Enter business names) <div style="border: 1px solid black; height: 100px; width: 100%;"></div>
14	Operation of an Internet shopping site		
15	Operation of an Internet auction site		
16	Electronic bulletin board services, blog services, and SNS operation		
17	ASP/SaaS		
18	Web contents delivery		
19	IPTV services (Internet video delivery)		
20	Electronic authentication services		
21	Information network security services		
22	Charging/settlement agent services		



2010 Basic Survey on the Information and Communications Industry (V) (Information Services)

(As of March 31, 2010)

- ☆ 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, 2010, for this survey and **enter the settlement results for fiscal 2009. 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, 2010.**

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 <div style="text-align: right; margin-top: 5px;">(Name of building)</div>	

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 information service business and the percentage of overseas sales in whole numbers.

Classification		million yen				Percentage of overseas sales
Custom software services	2001					%
Embedded software services	2002					%
Package software services	2003					%
Game software services	2004					%
Data processing services	2005					%
Research and information services, except marketing or opinion research services	2006					%
Miscellaneous data processing and information services	2007					%
Total sales of information service business in FY2009	2008					%

(Note 1) Include sales from ASP and SaaS that provide consistent services starting from the development of software in those from "Data processing services."

(Note 2) 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.

< FY2009 >

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

< FY2009 >

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

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

4 Efforts for Acquiring Certification

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

< As of the end of FY2009 >

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

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

(Note 2) "ISO 9001" refers to the quality management system standard aiming to enhance customer satisfaction through guaranteeing the quality of products and 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) "CMMI (Capability Maturity Model Integration)" refers to a model for enhancing the processing capability of an organization.

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

5 Situation of the Development and Production Section

- If your company **is engaged in development and production work**, answer the following questions.
 ○ If your company **is NOT engaged in development and production work**, you do not need to answer any more questions. Thank you very much for your cooperation.

(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 FY2009 | ⇒ | Enter ② and ③ |
| | 2. Did not implement outsourcing | ⇒ | Go to (2) |

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

<FY2009>

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).

<FY2009>

		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 FY2009 | ⇒ | Enter ② and ③ |
| | 2. Did not accept work from other companies in FY2009 | ⇒ | Go to (3) |

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

<FY2009>

Category	Code	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.

<FY2009>

		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. 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 FY2009.

(persons)

Development and production section		Number of workers (As of the end of FY2009)	Newly hired full-time workers and contract workers (FY2009)		Resignees and those with cancelled contracts (FY2009)
				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 foreign full-time and contract workers engaged in development and production work among the total of ① above.

(persons)

Development and production section		Number of workers (As of the end of FY2009)	Newly hired full-time workers and contract workers (FY2009)	Resignees and those with cancelled contracts (FY2009)
Asian	5309			
Chinese	5310			
Indian	5311			
Vietnamese	5312			
Philippines	5313			
American	5314			
Foreign contract workers (incl. freelancers)	5315			
Asian	5316			
Chinese	5317			
Indian	5318			
Vietnamese	5319			
Philippines	5320			
American	5321			

(4) Wage system for engineers

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

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

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

(5) Wages (annual income) of engineers

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

① Enter the average annual income.

<FY2009>

Average annual income of 35-year old engineers		100 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.

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

If your company develops game software, answer the following questions.

① Enter the number of contents and works of games that your company developed in FY2009.
< FY2009 >

		Number of contents and works
Number of developed games	5801	

② Regarding the games that your company developed (① above), enter the ratio of your company's rights as of March 31, 2010.
< As of the end of FY2009 >

Ratio		Number of rights concerning the primary use	Number of rights concerning the secondary use
100%	5802		
50% or more to less than 100%	5803		
0% or more to less than 50%	5804		
0% (Holding no rights)	5805		

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

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

	Yes	To some extent	Neutral	Not really	No
<input checked="" type="checkbox"/> 5806	1	----- 2	----- 3	----- 4	----- 5

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

	Yes	To some extent	Neutral	Not really	No
<input checked="" type="checkbox"/> 5807	1	----- 2	----- 3	----- 4	----- 5



2010 Basic Survey on the Information and Communications Industry (VI) (Video Picture, Sound Information, Character Information Production and Distribution)

(As of March 31, 2010)

- ☆ 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, 2010, for this survey and **enter the settlement results for fiscal 2009. 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, 2010.**

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 <div style="text-align: right;">(Name of building)</div>	

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

2 Sales

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

Classification			million yen			
Content production section	Motion picture and video production, except television program and animation production	2001				
	Animation production	2002				
	Recording and disk production	2003				
	Newspaper publishers	2004				
	Publishers, except newspapers	2005				
	Commercial art and graphic design	2006				
	Motion picture, video and television program distribution	2007				
	News syndicates (News suppliers)	2008				
	Miscellaneous services incidental to video picture, sound information, character information production and distribution	2009				
	Total sales of video picture, sound information, character information production and distribution business in FY2009	2010				

3 Business Operation

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

< As of the end of FY2009 >

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			

4 Charge System

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

4001

1. Flat-rate system

2. Pay-as-you-go system

3. Combination of both systems

4. Free delivery using an advertising model

5 Situation of the Content Production Section

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

- If your company **is engaged in content production (sales are entered in Q. 2 above)**, answer the following questions.
- If your company **is NOT engaged in content production (no sales are entered in Q. 2 above)**, you do not need to answer any more questions. Thank you very much for your cooperation.

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

- ① Enter the number of contents (works) that your company produced in FY2009.
Count all series with the same title as one.

< FY2009 >

		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, 2010.

< As of the end of FY2009 >

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.

<input checked="" type="checkbox"/> 5201	Packaged (CDs, DVDs, etc.)	1. Yes	2. No
<input checked="" type="checkbox"/> 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
<input checked="" type="checkbox"/> 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.
< FY2009 >

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

< FY2009 >

Category	Sales promotion expenses (incl. events)	Media advertising expenses	Breakdown percentages				Other
			TV commercials	Newspapers and magazines	Net advertisement	Transit advertisement	
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 FY2009	⇒	Enter ② and ③
	2. Did not implement outsourcing	⇒	Go to (5)

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.

< FY2009 >

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

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

< FY2009 >

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 FY2009.

Content production section	Number of workers (As of the end of FY2009)	Newly hired full-time workers and contract workers (FY2009)		Resignees and those with cancelled contracts (FY2009)
			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.

<FY2009>

Average annual income of 35-year old workers		100 thousand yen
Full-time workers	5701	
Contract workers (incl. freelancers)	5702	

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

- | | | |
|------|--------------------------------------|--|
| 5703 | Full-time workers | 1. From 1 to 1.5 times the average
2. From over 1.5 times to 2 times
3. From over 2 times to 3 times
4. From over 3 times to 4 times
5. Over 4 times |
| 5704 | Contract workers (incl. freelancers) | 1. From 1 to 1.5 times the average
2. From over 1.5 times to 2 times
3. From over 2 times to 3 times
4. From over 3 times to 4 times
5. Over 4 times |

(8) Human resource development

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

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

(9) Documentation

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

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

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

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

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

6 Situation of the Video Picture and Music Production Section

If your company is **engaged in the video picture and music production business**, enter the number of regular workers (excluding temporary or daily workers) of the section by location of your business offices. When your company has multiple offices, enter information for the five offices with the largest number of regular workers.

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

< As of the end of FY2009 >

	Prefecture	Municipality	Zip code (7 digits)	Regular workers in the section
6001			〒	
6002			〒	
6003			〒	
6004			〒	
6005			〒	