

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

**2011 Basic Survey on the Information and  
Communications Industry  
(Performance in FY2010)**

**December 20, 2011**

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

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

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

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# Summary of the Preliminary Report on the 2011 Basic Survey on the Information and Communications Industry

## Points

- The number of companies engaged in the information and communications business was 4,763, out of which 4,114 companies were operating this as their main business.
- The total sales of these 4,763 companies from the information and communications business were 40.5132 trillion yen. The total sales of the 4,114 companies mainly engaged in this business were 37.9207 trillion yen.

### Chapter 1, Section 1: Results Based on Business Activities

→p.2, p.11

The number of companies engaged in the information and communications business (meaning companies that engage in this business, whether as their main business or not) was 4,763 and the total sales were 40.5132 trillion yen (the total sales of these 4,763 companies were 60.5006 trillion yen) in FY2010. Sales from the information and communications business for companies that responded to the survey for the second consecutive year were 36.5827 trillion yen (down 1.7% compared to the previous fiscal year). Sales were the largest for the telecommunications business, followed by software, and data processing and information services. These three businesses accounted for 77.7% of the total.

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

→p.3, p.17

The number of companies rated as an information and communications company (meaning companies for which their sales from the information and communications business are rated as being the largest) was 4,114 and their total sales were 40.9675 trillion yen (sales from the information and communications business were 37.9207 trillion yen).

The sales per company was 9.96 billion yen (up 9.5%). The sales per company were largest for telecommunications companies, followed by newspaper publishers and other publishers.

Looking at the number of companies in the IC business by sales size the number of companies with sales of 1 billion yen or more accounted for 51.9% of the total.

### Chapter 2: Telecommunications and Broadcasting Business

→p.4, p.25

The number of companies engaged in the telecommunications and broadcasting business was 922 and the total sales in FY2010 were 13.4942 trillion yen. Sales by companies that responded to the survey for the second consecutive year were 13.1031 trillion yen (down 0.9%). By business type, sales were 10.7423 trillion yen for the telecommunications business, 1.6682 trillion yen for the private broadcasting business, and 399.7 billion yen for the cable television broadcasting business.

### Chapter 3: Broadcast Program Production Business

→p.5, p.30

The number of companies engaged in the broadcast program production business was 276 and the total sales in FY2010 were 244.2 billion yen. Sales by companies that responded to the survey for the second consecutive year were 139.5 billion yen (down 7.4%). Business operators with capital of less than 50 million yen accounted for more than 80% and those with less than 100 workers accounted for more than 90%.

### Chapter 4: Internet Based Service Business

→p.6, p.34

The number of companies engaged in the Internet based service business was 482 and the total sales in FY2010 were 1.0707 trillion yen.

The sales per company were 2.22 billion yen (down 26.6%), but sales by companies that responded to the survey for the second consecutive year increased to 3.7 billion yen (up 1.2%).

### Chapter 5: Information Service Business

→p.7, p.38

The number of companies engaged in the information service business was 2,900 and the total sales in FY2010 were 10.2563 trillion yen.

The sales per company were 3.54 billion yen (up 2.9%), and when looking by sector, sales by game software companies increased greatly (up 16.7%).

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

→p.8, p.43

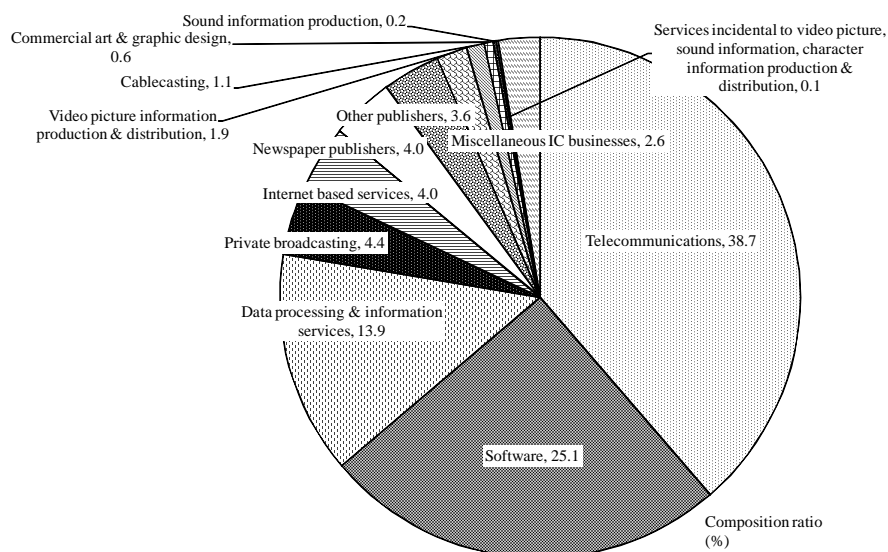
The number of companies engaged in the video picture, sound information, character information production and distribution business was 445 and the total sales in FY2010 were 2.0836 trillion yen.

The sales per company were 4.68 billion yen (up 6.4%). By sector, sales by other publishers which had a large number of companies, decreased, but sales by motion picture and video production companies and newspaper publishers increased.

## 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 4,763 and the total sales from this business were 40.5132 trillion yen (the total sales of these 4,763 companies were 60.5006 trillion yen) in FY2010. Sales from the information and communications business by companies that responded to the survey for the second consecutive year were 36.5827 trillion yen (down 1.7%).
- Sales were the largest for the telecommunications business, followed by the software business, and the data processing and information services. These three businesses accounted for 77.7% of the total.
- Looking at the composition ratios of companies in information and communications by rate of engagement in side-businesses, in all 12 business types, over 50% of companies also operated other businesses concurrently.

Sales from the Information and Communications Industry in FY2010

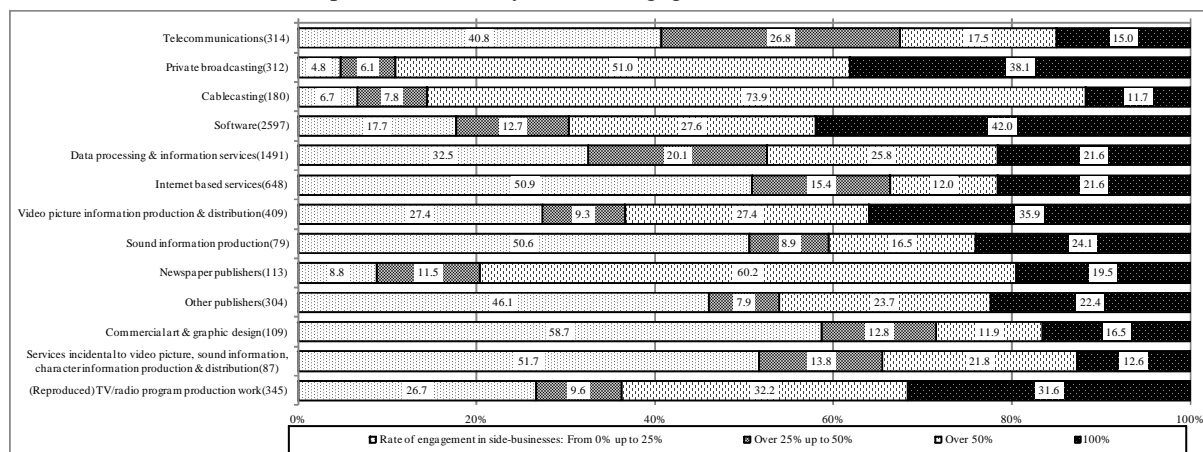


	Number of companies	Sales from the relevant business Sales (100 million yen)	Composition ratio (%)
Overall	4,763	405,132	100.0
Telecommunications	314	156,659	38.7
Software	2,597	101,811	25.1
Data processing & information services	1,491	56,180	13.9
Private broadcasting	312	17,724	4.4
Internet based services	648	16,069	4.0
Newspaper publishers	113	16,044	4.0
Other publishers	304	14,476	3.6
Video picture information production & distribution	409	7,695	1.9
Cablecasting	180	4,439	1.1
Commercial art & graphic design	109	2,288	0.6
Sound information production	79	767	0.2
Services incidental to video picture, sound information, character information production & distribution	87	577	0.1
Miscellaneous IC businesses	-	10,402	2.6

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

	Number of companies	Sales (100 million yen)	Sales from the relevant business (100 million yen)
FY2009	3,790	451,005	372,062
FY2010	3,790	449,202	365,827
Year-on-year (%)	-	-0.4	-1.7

Composition Ratios 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

- When looking at companies rated as information and communications companies (meaning companies for which their sales from the information and communications business are rated as being the largest), per IC company, the number of establishments was 3.7 (up 0.4 establishments), the number of regular workers was 250 (up 17.4%), sales were 9.96 billion yen (up 9.5%), operating profit was 889 million yen (up 31.2%), and ordinary profit was 811 million yen (up 19.8%).
- Looking at the number of IC companies by sales size, companies with sales of 1 billion yen or more accounted for over 50% of the total, with companies with sales of 1 billion yen to less than 10 billion yen 41.5% and companies with sales of 10 billion yen or more 10.4%.

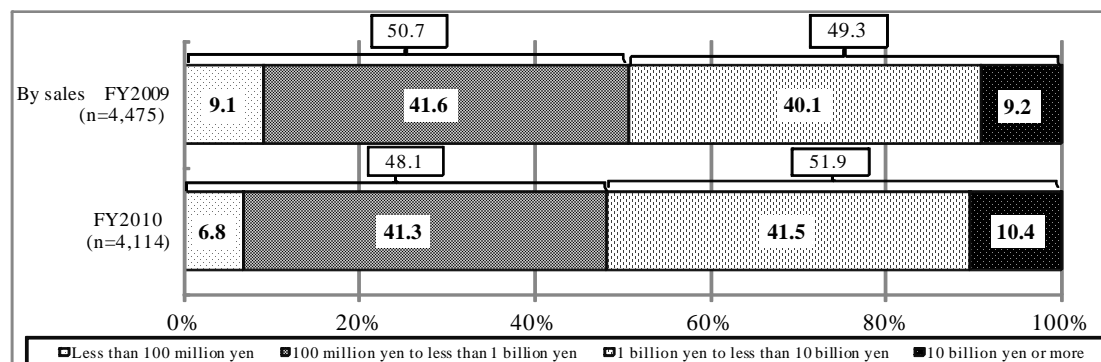
### Outline (Per Company)

		Number of establishments	Number of workers (persons)	Number of regular workers (persons)	Sales (million yen)	Sales from the IC business (million yen)	Operating profit (million yen)	Ordinary profit (million yen)	Number of subsidiaries and affiliated companies owned
Total	FY2009	3.9	248	246	10,062.8	8,288.8	669.5	678.3	4.8
	FY2010	4.6	293	291	12,702.2	8,505.8	961.4	878.7	5.0
	Year-on-year (%)	0.7	18.1	18.3	26.2	2.6	43.6	29.5	0.2
IC companies	FY2009	3.3	214	213	9,097.9	8,699.3	677.9	676.8	4.0
	FY2010	3.7	251	250	9,958.1	9,217.5	889.1	810.7	4.2
	Year-on-year (%)	0.4	17.3	17.4	9.5	6.0	31.2	19.8	0.2
Telecommunications	FY2009	6.0	951	951	144,522.1	140,979.0	14,324.5	14,116.7	21.2
	FY2010	6.8	1,078	1,077	150,062.0	146,095.9	20,787.5	17,528.0	11.6
	Year-on-year (%)	0.8	15.8	15.7	3.8	3.6	45.1	24.2	-9.6
Private broadcasting	FY2009	2.8	76	74	6,352.6	6,128.5	323.5	242.9	4.0
	FY2010	2.4	83	81	6,993.5	6,685.7	463.4	378.2	3.3
	Year-on-year (%)	-0.4	9.2	9.5	10.1	9.1	43.2	55.7	-0.7
Cablecasting	FY2009	1.5	58	57	2,800.3	2,787.5	466.0	430.9	5.2
	FY2010	2.6	85	85	4,031.7	4,019.5	566.0	396.7	3.7
	Year-on-year (%)	1.1	46.6	49.1	44.0	44.2	21.5	-7.9	-1.5
Software	FY2009	2.8	221	221	4,269.9	3,990.1	219.0	228.4	2.6
	FY2010	2.9	249	249	5,473.2	4,742.1	267.6	292.7	3.1
	Year-on-year (%)	0.1	12.7	12.7	28.2	18.8	22.2	28.2	0.5
Data processing & information services	FY2009	4.1	282	281	7,430.9	7,007.4	467.9	498.5	4.1
	FY2010	5.0	331	330	7,692.1	6,805.7	435.3	451.6	4.7
	Year-on-year (%)	0.9	17.4	17.4	3.5	-2.9	-7.0	-9.4	0.6
Internet based services	FY2009	2.3	151	151	6,499.2	6,285.5	598.9	603.7	4.0
	FY2010	2.3	148	148	4,956.3	4,598.1	597.5	531.5	3.9
	Year-on-year (%)	0.0	-2	-2	-23.7	-26.8	-0.2	-12	-0.1
Video picture information production & distribution	FY2009	1.5	61	60	1,976.9	1,751.1	87.3	102.5	5.0
	FY2010	1.7	79	78	2,871.0	2,494.2	148.5	187.7	5.7
	Year-on-year (%)	0.2	29.5	30.0	45.2	42.4	70.1	83.1	0.7
TV program production	FY2009	1.4	51	50	1,386.1	1,309.0	42.7	44.6	2.2
	FY2010	1.5	65	64	1,744.9	1,600.5	56.4	81.2	3.7
	Year-on-year (%)	0.1	27.5	28.0	25.9	22.3	32.1	82.1	1.5
Sound information production	FY2009	1.1	40	36	2,543.4	2,531.0	71.8	82.7	3.0
	FY2010	1.2	31	31	3,073.8	2,809.4	212.5	220.7	1.7
	Year-on-year (%)	0.1	-22.5	-13.9	20.9	11.0	196.0	166.9	-1.3
Radio program production	FY2009	1.2	19	14	240.2	224.7	9.1	9.8	-
	FY2010	1.1	18	18	568.0	567.7	22.4	22.9	1.0
	Year-on-year (%)	-0.1	-5.3	28.6	136.5	152.6	146.2	133.7	-
Newspaper publishers	FY2009	19.9	452	447	19,552.2	17,462.1	89.4	225.4	9.6
	FY2010	21.6	457	452	19,455.3	17,702.4	479.4	579.5	10.6
	Year-on-year (%)	1.7	1.1	1.1	-0.5	1.4	436.2	157.1	1.0
Other publishers	FY2009	4.3	235	218	10,139.8	9,784.1	507.6	544.1	4.7
	FY2010	4.8	241	232	10,601.6	10,242.6	680.8	781.7	4.4
	Year-on-year (%)	0.5	2.6	6.4	4.6	4.7	34.1	43.7	-0.3
Commercial art & graphic design	FY2009	1.7	70	69	1,735.2	1,670.7	133.0	14.5	2.1
	FY2010	2.0	43	43	1,169.7	1,109.5	38.9	37.3	1.6
	Year-on-year (%)	0.3	-38.6	-37.7	-32.6	-33.6	-70.8	157.2	-0.5
Services incidental to video picture, sound information, character information production & distribution	FY2009	5.1	93	92	1,795.1	1,702.4	-111.4	-98.4	3.5
	FY2010	4.9	94	94	1,677.0	1,411.1	-72.1	-57.4	2.6
	Year-on-year (%)	-0.2	1.1	2.2	-6.6	-17.1	-	-	-0.9

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

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

### Number of IC Companies by Sales Size (Composition Ratios)



## Points of Chapter 2: Telecommunications and Broadcasting

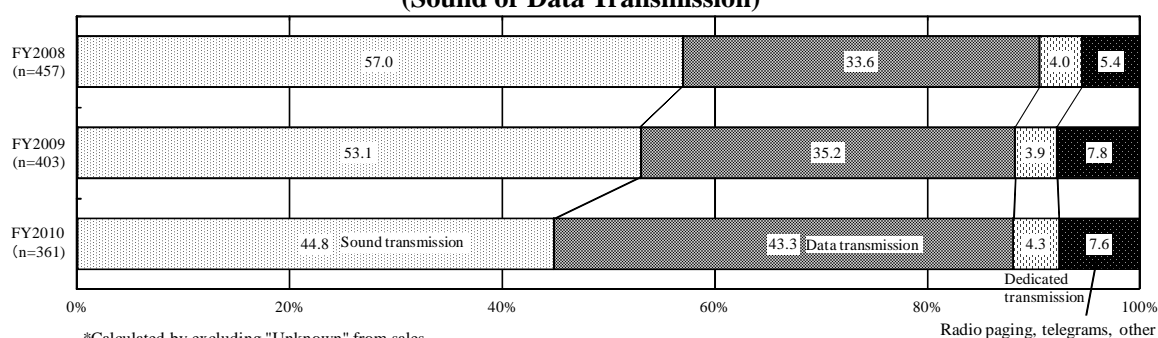
- The total sales in the telecommunications and broadcasting business were 13.4942 trillion yen in FY 2010. Among this, sales by companies that responded to the survey for the second consecutive year were 13.1031 trillion yen (down 0.9%). When looking at sales in FY2010 by business type, sales were 10.7423 trillion yen for the telecommunications business, 1.6682 trillion yen for the private broadcasting business, and 399.7 billion yen for the cable television broadcasting business.
- Looking at the composition ratio of sales in the telecommunications business, the percentage of data transmission continued to increase, achieving approximately the same level as sound transmission in this year's survey.
- With regard to companies that are thinking of expanding their business to new fields within one year, approximately 60% consist of those in the telecommunications and cable television broadcasting business. Looking at the business fields in which companies want to expand towards, percentages for cloud computing services (up 8.0 points) and Web contents delivery (up 3.3 points) in the telecommunications business; Web contents delivery (up 7.9 points) in the private broadcasting business; wireless Internet access (up 5.1 points) and Web contents delivery (up 3.7 points) in the cable television broadcasting business increased.

## Sales in Telecommunications and Broadcasting Business

Classification	FY2010		Companies that responded to the survey for the second consecutive year				
	Number of companies	Sales	FY2009		FY2010		Year-on-year(%)
			Number of companies	Sales	Number of companies	Sales	
Overall	922	134,942	777	132,246	778	131,031	-0.9
Telecommunications	361	107,423	267	104,789	264	104,239	-0.5
Broadcasting	561	27,519	510	27,457	514	26,792	-2.4
Private broadcasting	356	16,682	332	17,536	334	16,553	-5.6
Cable television broadcasting	204	3,997	177	3,222	179	3,400	5.5
NHK	1	6,840	1	6,699	1	6,840	2.1

\*Data for NHK are based on publicized materials

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



## New Businesses that Companies Intend to Expand in the Future (multiple answers allowed)

Telecommunications			Private broadcasting			Cable television broadcasting		
New Businesses that Companies Intend to Expand in the Future	FY2009 (n=125)	FY2010 (n=165)	New Businesses that Companies Intend to Expand in the Future	FY2009 (n=128)	FY2010 (n=91)	New Businesses that Companies Intend to Expand in the Future	FY2009 (n=73)	FY2010 (n=95)
Cloud computing services	16.8	24.8	Web contents delivery	27.3	35.2	FTTH services	35.6	34.7
FTTH services	19.2	21.2	Of which, IPTV services	7.0	7.7	Wireless Internet access	23.3	28.4
Wireless Internet access	17.6	18.2	Internet advertising	21.9	23.1	Internet advertising	11.0	13.7
Other Internet based services	14.4	10.9	Provision of digital contents other than Web sites	11.7	14.3	Web contents delivery	6.8	10.5
Internet advertising	8.8	10.3	Production of digital contents other than Web sites	14.1	13.2	Of which, IPTV services	2.7	2.1
Server management consignment	9.6	9.7	Internet mail order services	21.9	11.0	Other Internet based services	8.2	10.5
Server housing	8.8	7.9	Other Internet based services	7.8	9.9	Electronic bulletin board services, blog services, and SNS operation	5.5	7.4
Web contents delivery	4.0	7.3	Satellite broadcasting (110 degrees east longitude CS digital broadcast)	1.6	9.9	Internet mail order services	8.2	6.3
Of which, IPTV services	0.8	2.4	Operation of an Internet shopping site	12.5	8.8	Satellite broadcasting (110 degrees east longitude CS digital broadcast)	1.4	5.3
Software	6.4	7.3	Cable Internet	5.5	7.7	Cable Internet	6.8	5.3
Internet mail order services	6.4	7.3	Of which, IPTV services	4.7	6.6	Of which, IPTV services	2.7	4.2
Information processing/provision services	5.6	5.5	Equipment maintenance, repair, and management	5.5	5.5	Cloud computing services	2.7	5.3
Other	16.0	12.1	Electronic bulletin board services, blog services, and SNS operation	4.7	5.5	Other	15.1	17.9
			Other	11.7	17.6			

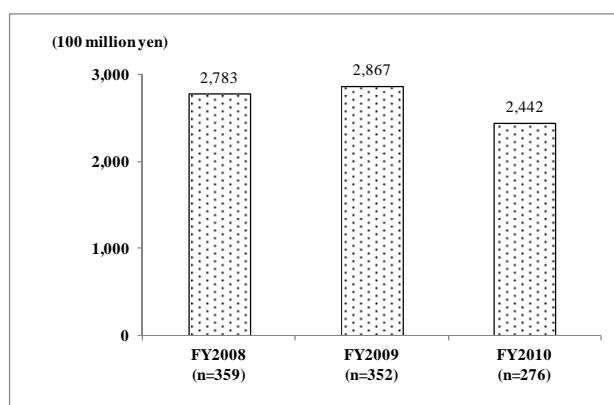
(Note) Represents the value obtained upon dividing with the number of companies that responded that they are intending to expand to new businesses within a year.

For "Cloud computing services," the values tabulated based on "ASP•SaaS" for FY2009 are used.

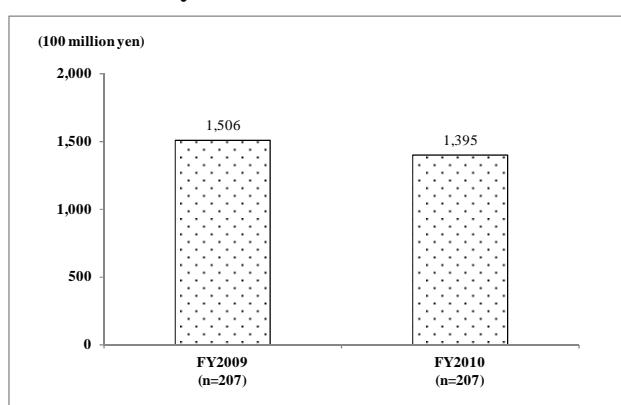
### Points of Chapter 3: Broadcast Program Production

- The total sales in FY2010 were 244.2 billion yen, among which the total sales by companies that responded to the survey for the second consecutive year were 139.5 billion yen (down 7.4%).
- With regard to broadcast programs for which secondary use is possible based on a company's own intent, the percentage of broadcast program producers that are actually carrying out secondary use increased greatly to 73.7% (up 26.4 points).
- The rate of digitalization of instruments used for broadcast program production exceeded 80% for VTRs, cameras, and editing machines.

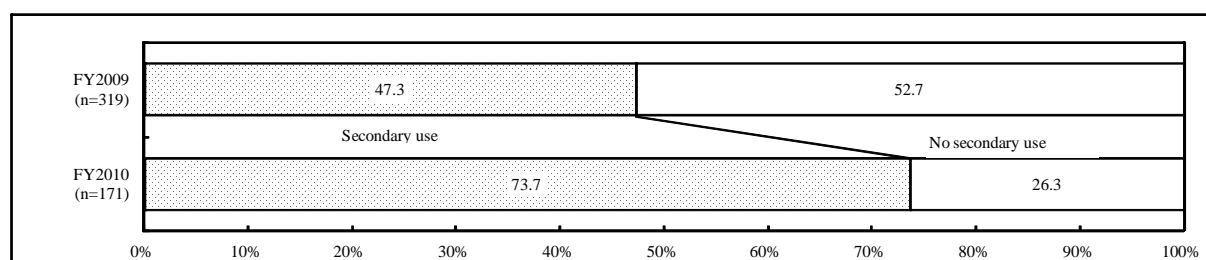
Sales in the Broadcast Program Production Business



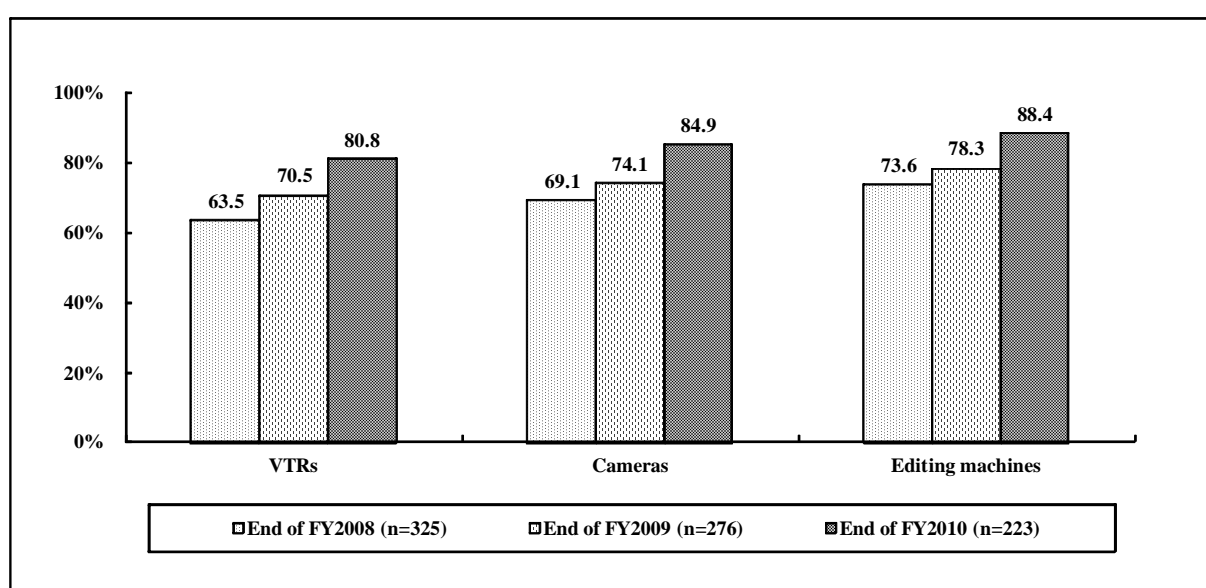
Changes in Sales of Companies that Responded to the Survey for the Second Consecutive Year



Secondary Use of Television Broadcast Programs



Changes in Digitalization Ratios of instruments Used for Broadcast Program Production



## Points of Chapter 4: Internet Based Services

- The total sales in FY2010 were 1.0707 trillion yen. The sales per company were 2.22 billion yen (down 26.6%). Sales were up 1.2% compared that responded to the survey for the second consecutive year.
- Looking at sales per company by service type, sales were the largest for Web information search services, followed by charging/settlement agent services, and shopping site operation and auction site operation.
- Regarding new business fields that companies intend to start in the future, cloud computing services (up 15.4 points) and consulting (up 12.2 points) increased greatly.

## Number of Companies and Sales by Service Type

(Unit: companies, %, million yen)

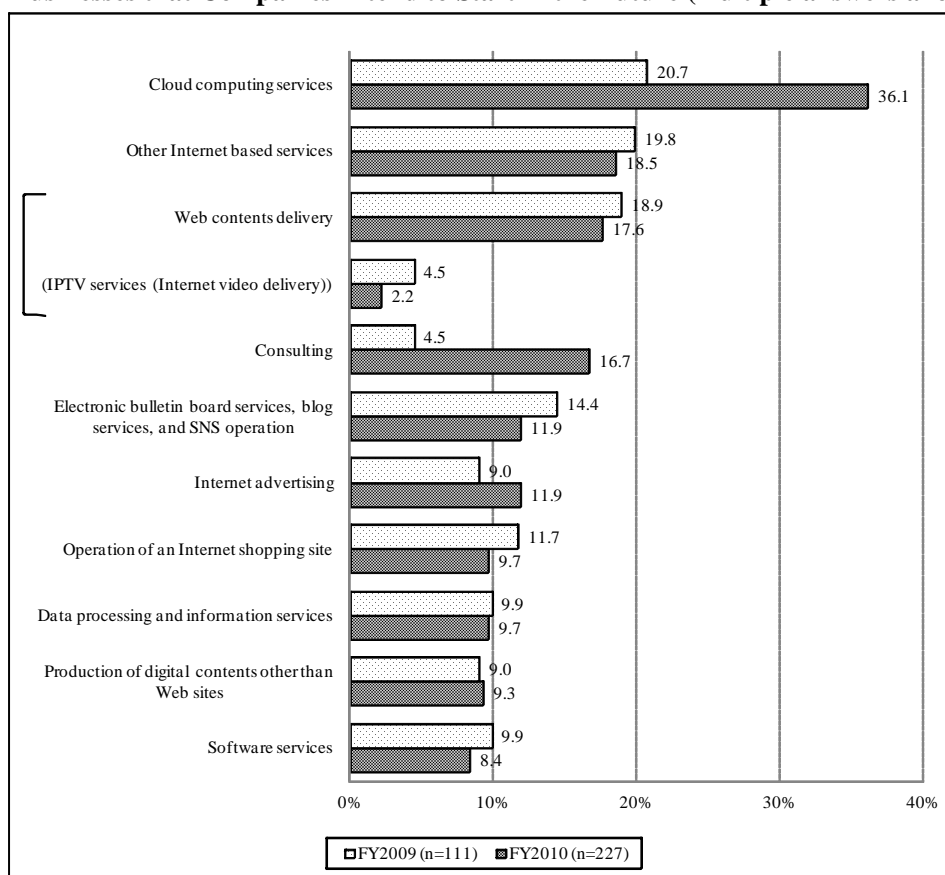
	Number of companies			Sales			Sales per company		
	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)
Total	286	482	68.5	865,841	1,070,707	23.7	3,027.4	2,221.4	-26.6
Web information search services	32	58	81.3	226,967	209,254	-7.8	7,092.7	3,607.8	-49.1
Shopping site operation and auction site operation	49	72	46.9	144,348	141,389	-2.0	2,945.9	1,963.7	-33.3
Electronic bulletin board services, blog services, and SNS operation	13	24	84.6	51,076	20,200	-60.5	3,928.9	841.7	-78.6
Web contents delivery services	84	128	52.4	150,457	186,544	24.0	1,791.2	1,457.4	-18.6
Revenue from IPTV services	7	11	57.1	34,057	4,827	-85.8	4,865.3	438.8	-91.0
Cloud computing services	55	98	78.2	35,591	56,776	59.5	647.1	579.3	-10.5
Electronic authentication services	12	13	8.3	4,540	5,080	11.9	378.3	390.8	3.3
Information network security services	26	53	103.8	39,436	67,095	70.1	1,516.8	1,265.9	-16.5
Charging/settlement agent services	9	12	33.3	11,822	32,152	172.0	1,313.6	2,679.3	104.0
Server management consignment	63	93	47.6	45,625	69,462	52.2	724.2	746.9	3.1
Other Internet based services	104	158	51.9	114,307	282,753	147.4	1,099.1	1,789.6	62.8
(Special tabulation) Companies that responded to the survey for the second consecutive year	180	180	-	658,585	666,356	1.2	3,658.8	3,702.0	1.2

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

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

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

## New Businesses that Companies Intend to Start in the Future (multiple answers allowed)



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

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



## Points of Chapter 5: Information Services

- The total sales were 10.2563 trillion yen in FY2010. The sales per company were 3.54 billion yen (up 2.9%), with an increase by game software companies (up 16.7%).
- Looking at the percentages of the number of companies in the development and production section according to primary contractors and subcontractors, the percentage of primary contractors increased and the percentage of subcontractors decreased in accordance with a larger capital size.
- The number of regular workers per company in the development and production section was 179 (up 9.1%), and the number of workers per custom software service company was 194 (up 13.5%).

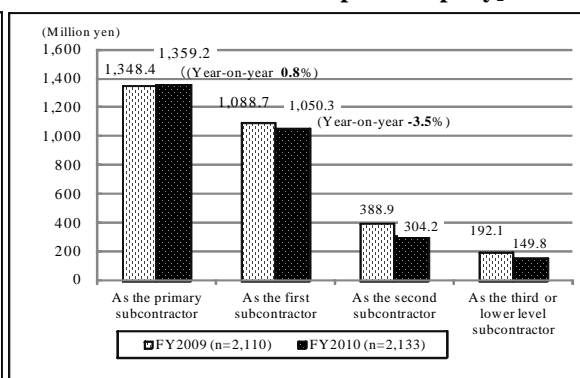
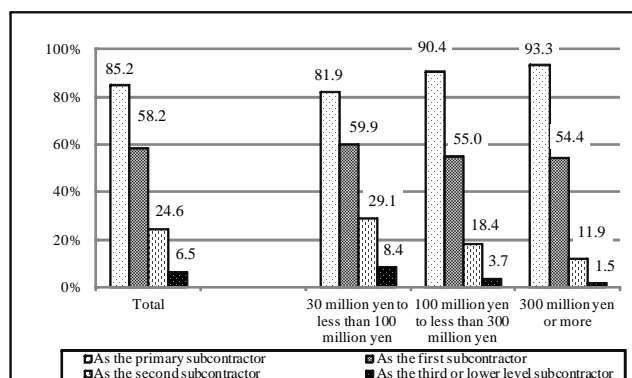
### Number of Companies and Sales by Sector (Based on Companies' Main Business)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)
Total	2,926	2,900	-0.9	10,060,097	10,256,289	2.0	3,438.2	3,536.7	2.9
Custom software service companies	1,491	1,471	-1.3	4,382,166	4,545,808	3.7	2,939.1	3,090.3	5.1
Embedded software service companies	103	102	-1.0	255,318	164,820	-35.4	2,478.8	1,615.9	-34.8
Package software service companies	275	246	-10.5	377,794	322,987	-14.5	1,373.8	1,313.0	-4.4
Game software companies	48	47	-2.1	124,126	141,817	14.3	2,586.0	3,017.4	16.7
Data processing service companies	523	545	4.2	2,647,059	2,801,464	5.8	5,061.3	5,140.3	1.6
Research & information service companies	149	131	-12.1	596,582	275,738	-53.8	4,003.9	2,104.9	-47.4
Miscellaneous information service companies	337	358	6.2	1,677,052	2,003,655	19.5	4,976.4	5,596.8	12.5
(Special tabulation) Companies that responded to the survey for the second consecutive year	2,217	2,217	-	8,213,687	7,973,260	-2.9	3,704.9	3,596.4	-2.9

### Primary Contractors and Subcontractors

[Percentage of Number of Companies by Capital Size]

[Amount Accepted as Primary Contractor /Subcontractor per Company]



### Number of Workers in the Development and Production Section

		Number of companies that provided valid responses	Number of regular workers (persons)	Full-time workers/ Regular staff members		Part-timers	Contract workers		Dispatched workers (persons)	Number of regular workers per company (persons)	Year-on-year (%)	Full-time workers/ Regular staff		Year-on-year (%)
				Regular staff members	Foreign workers		Regular workers	Foreign workers				Regular staff	Foreign workers	
Total	FY2009	2,400	392,947	362,698	5,840	8,181	10,165	427	38,772	164	-	151	-	-
	FY2010	2,397	428,638	383,545	4,647	7,195	24,294	502	38,722	179	9.1	160	6.0	6.0
Custom software service companies	FY2009	1,485	253,318	237,613	4,584	2,316	5,557	306	23,747	171	-	160	-	-
	FY2010	1,456	282,905	253,085	3,668	2,160	19,750	417	22,493	194	13.5	174	8.8	8.8
Embedded software service companies	FY2009	102	25,224	24,471	191	120	289	9	1,897	247	-	240	-	-
	FY2010	99	14,487	13,385	55	87	213	6	829	146	-40.9	135	-43.8	-43.8
Package software service companies	FY2009	275	17,528	16,121	339	469	654	13	2,313	64	-	59	-	-
	FY2010	237	14,409	13,459	218	334	396	7	847	61	-4.7	57	-3.4	-3.4
Game software service companies	FY2009	48	5,745	4,405	88	190	1,055	15	237	120	-	92	-	-
	FY2010	46	6,675	5,351	47	213	842	4	292	145	20.8	116	26.1	26.1
Data processing service companies	FY2009	326	60,332	52,126	284	4,768	2,229	80	6,966	185	-	160	-	-
	FY2010	354	65,863	57,319	376	3,994	1,932	51	9,628	186	0.5	162	1.3	1.3
Research & information service companies	FY2009	32	6,408	5,932	60	40	22	-	1,681	200	-	185	-	-
	FY2010	38	3,229	2,797	102	136	184	1	99	85	-57.5	74	-60	-60
Miscellaneous information service companies	FY2009	132	24,392	22,030	294	278	359	4	1,931	185	-	167	-	-
	FY2010	167	41,070	38,149	181	271	977	16	4,534	246	33.0	228	36.5	36.5

## Points of Chapter 6:

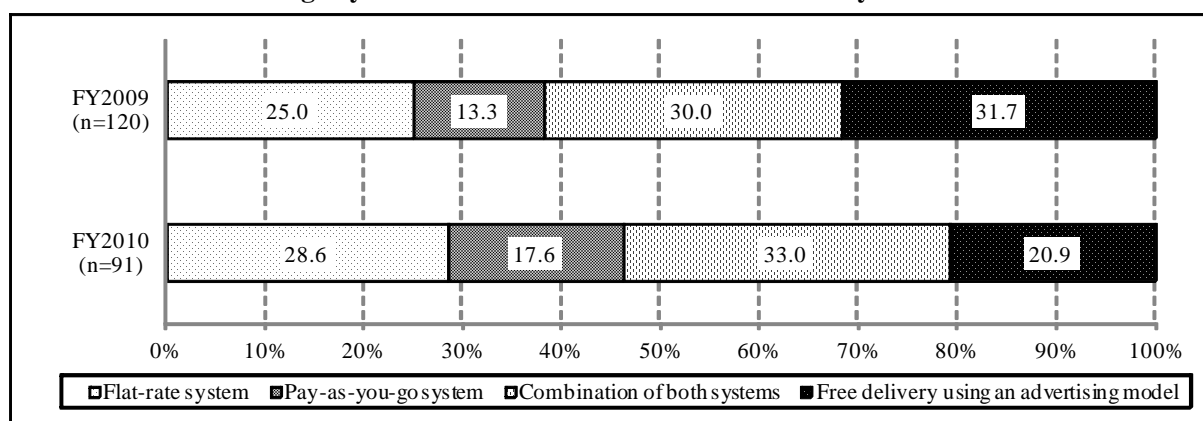
### Video Picture, Sound Information, Character Information Production and Distribution

- The total sales were 2.0836 trillion yen in FY2010, and sales per company amounted to 4.68 billion yen (up 6.4%). By sector, sales by newspaper publishers were the largest, followed by motion picture, video & TV program distribution companies, and recording and disk production companies.
- With regard to charge systems for video picture and music delivery services, the percentage of free delivery using an advertising model decreased (down 10.8 points), and the percentages of charge systems such as a flat-rate system and a pay-as-you-go system increased.
- Looking at rights held for produced contents by sector, while the percentage of contents for which secondary use was performed was low for newspaper companies, their percentage of rights held was high. Meanwhile, for other publishers, the percentage of contents for which secondary use was performed was respectively higher than other sectors.

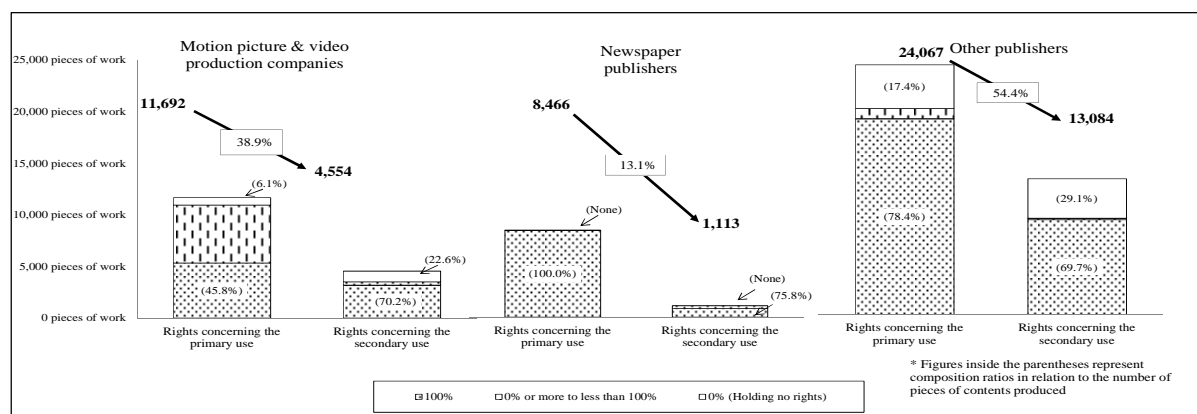
### Number of Companies and Sales by Sector in the Video Picture, Sound Information, Character Information Production and Distribution Business (Based on Companies' Main Business)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)
Total	391	445	13.8	1,720,150	2,083,565	21.1	4,399.4	4,682.2	6.4
Motion picture & video production companies	43	55	27.9	66,500	152,361	129.1	1,546.5	2,770.2	79.1
Animation production companies	8	9	12.5	36,826	14,786	-59.8	4,603.3	1,642.9	-64.3
Recording and disk production companies	3	4	33.3	7,904	20,400	158.1	2,634.7	5,100.0	93.6
Newspaper publishers	55	64	16.4	355,900	657,673	84.8	6,470.9	10,276.1	58.8
Other publishers	128	140	9.4	658,627	706,604	7.3	5,145.5	5,047.2	-1.9
Commercial art and graphic design companies	76	80	5.3	385,934	319,643	-17.2	5,078.1	3,995.5	-21.3
Motion picture, video & TV program distribution companies	17	19	11.8	120,921	102,484	-15.2	7,113.0	5,393.9	-24.2
Service companies incidental to video picture, sound information, character information production & distribution	61	74	21.3	87,538	109,614	25.2	1,435.0	1,481.3	3.2
(Special tabulation) Companies that responded to the survey for the second consecutive year	253	253	-	1,306,954	1,270,833	-2.8	5,165.8	5,023.1	-2.8

### Charge System for Video Picture and Music Delivery Services



### Holding of Rights for Produced Contents in Development and Production (Major Sectors)



## 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, 2011, and have compiled and published the results as a preliminary report. The outline of the survey and the notes for use of the statistical tables are as follows.

### (Terms)

- “Regular workers” refer to paid directors and regularly employed people (people, regardless of their title as a full-time worker, regular staff member, part-timer, temporary or contract workers, etc. employed under a contract longer than one month, or persons employed for 18 days or more each month in the two months prior to the end of the 2010 fiscal year or the latest accounting term).
- “Full-time workers/Regular staff members” refer to workers generally referred to as full-time workers/regular staff members.
- “Part-timers” refer to regular workers whose scheduled daily working hours or number of working days in a week are shorter than that of full-time workers/regular staff members.
- “Workers transferred to other companies” refer to workers who are transferred to parent companies, subsidiaries, affiliate companies, etc. in Japan or overseas, and who are being paid a salary mainly by the company from which they are being transferred (the said company is mainly responsible for paying the workers’ salaries).
- “Temporary or daily workers” refer to people who are employed for a period of up to one month, or those who are brought in on a daily basis. They are not included in regular workers.
- “Dispatched workers” refer to workers who are employed by a worker-dispatching business operator and are engaged in an accepting company's operations under its supervision and command, based on a contract between the accepting company and the worker-dispatching business operator, under the aforementioned employment relationship. They are not included in the total number of workers of the accepting company.
- “Workers” refer to the combination of “regular workers” and “temporary or daily workers.”
- A “subsidiary” is a company in which a certain company (parent company) owns more than 50% of the voting rights. It includes a company in which the subsidiary, or the parent company and the subsidiary combined, own more than 50% of the voting rights (deemed subsidiary) and a company practically controlled by the subsidiary or jointly by the parent company and the subsidiary even in the case they own only 50% or less of the voting rights.
- An “affiliated company” is a company in which a certain company directly owns no less than 20% but no more than 50% of the voting rights.
- In this report, the “telecommunications business” shows data only for the communications business, and the “telecommunications and broadcasting business” shows the total of the telecommunications business and the broadcasting business.
- “(Reproduced) TV/radio program production work” indicates the total of TV program production work and radio program production work among the overall video picture, sound information, character information production and distribution work.
- “Companies that responded to the survey for the second consecutive year” refer to companies that provided responses to both the previous survey and this survey.

### (Figures)

- In the tables, “-” means that there is no applicable number and “0” means that the figure is under the unit.
- In the statistical tables, “X” means that the value was kept confidential since the number of companies was two or less. In addition, areas where it is possible to determine confidential values from the surrounding context even if the number of companies is three or more, such values are kept confidential.
- All figures show the total of valid responses for each item
- As figures and composition ratios round off digits under the units, and there may be cases with no responses in the breakdown, the aggregated amount does not necessarily match the total.
- The numbers of companies, establishments, workers, and subsidiaries are those at the end of FY2010 and sales are the performance of the entirety of FY2010.
- Breakdown data of the “number of regular workers” (“full-time workers” + “part-timers” + “dispatched workers” + “workers transferred to other companies”) do not match the total. The difference includes the numbers of paid directors and contract workers, etc.
- ○○%-point differences from the previous fiscal year are expressed as “○○ points.”

### (Other)

- This preliminary report shows the results obtained from questionnaires collected as of the end of October 2011, and the final report compiled based on all valid responses will be publicized in March 2012.
- As only valid responses are counted, the number of companies that submitted a response varies by item. Furthermore, as each type of survey form was sent to and collected from different companies, the number of responding companies varies by Chapter even for the same type of business.

- Chapter 1 compiles the survey results regarding all companies engaged in the information and communications business, both from the viewpoint of companies' business activities (Results Based on Business Activities) and from the viewpoint of companies' main business (Results Based on Companies Rated as Mainly Engaged in the IC Business). The entirety of activity-based results matches the total on the basis of companies rated as mainly engaged in the information and communications business.
- Results based on business activities in Chapter 1, Section 1 are created by focusing on the contents of activities run by companies. In cases where companies are engaged in side-businesses, figures (number of establishments, number of workers, etc.) for the company as a whole in the respective business types are tabulated.  
(For example, if a company is engaged in the telecommunications business and the data processing & information services business, its figures are tabulated respectively in telecommunications and data processing & information services in tables and diagrams.)  
Accordingly, the total of each business sector does not match the figure for "overall."
- The results based on business activities in Chapter 1, Section 2 are created by rating companies in the business sector where they have the largest sales. Large classifications ("Information and Communications," "Manufacturing," "Wholesale and Retail Trade," etc.) are determined based on the area in which companies' have the largest sales. Within these large classifications, sales are compared based on small classifications, and main businesses (small classifications) ("telecommunications," "private broadcasting," etc.) are determined based on the largest sales.  
(For example, if a company is engaged in the telecommunications business and the data processing & information services business, when sales is larger from the telecommunications business tabulations are made by rating the company as a telecommunications company; the total amount and the total of each business match.)
- It should be noted that since the numbers of valid responses vary for each year that the survey was conducted, care should be exercised when making inter-annual comparisons.
- Comparisons with actual results from FY2008 are made using results from 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.
- In Chapter 2, survey results are compiled by business type. Therefore, companies engaged in multiple businesses are included either in the total of the telecommunications and broadcasting business or in the broadcasting business.
- In Chapter 6, data for the video picture, sound information, character information production and distribution work are compiled without those for the TV program production work and the radio program production work.
- The Japan Broadcasting Corporation (NHK) is not covered by this survey, but data for some related parts are cited from materials publicized by NHK ("Inventory, Balance Sheet, Profit and Loss Statement, Statement of Changes in Net Assets, Cash Flow Statement, and Written Explanations Thereof (NHK)."
- For companies with capital of 500 million yen or more that had submitted questionnaires for the annual survey for the "Financial Statements Statistics of Corporations by Industry" conducted by the Ministry of Finance, part of the data for this survey's "Assets, Liabilities and Capital" and "Sales and Expenses" in the Survey on Items Common to All Business Types (Survey Questionnaire (I)) are based on said data collected by the Ministry of Finance.
- For companies with 50 or more workers and with capital or contributions of 30 million yen or more that had submitted questionnaires for the "Basic Survey of Japanese Business Structures and Activities" conducted by the Ministry of Economy, Trade and Industry, all data for the Survey on Items Common to All Business Types (Survey Questionnaire (I)) are based on said data collected by the Ministry of Economy, Trade and Industry.
- When reprinting figures listed in this report onto other media, please cite the "'Preliminary Report on the 2011 Basic Survey on the Information and Communications Industry' (Ministry of Internal Affairs and Communications/Ministry of Economy, Trade and Industry)."

(Collection)

Questionnaire type		Companies to which the questionnaire was sent	Companies that submitted a response	Response rate	Companies that gave a valid response
Survey on Items for Each Business Type	Questionnaire (I) (Common Survey)	8,328	5,527	66.4%	4,763
	(II) (Telecommunications and Broadcasting)	1,362	866	63.6%	727
	(III) (Broadcast Program Production)	735	310	42.2%	276
	(IV) (Internet Based Service)	1,370	756	55.2%	482
	(V) (Information Service)	5,564	3,517	63.2%	2,900
	(VI) (Video Picture, Sound Information, Character Information Production and Distribution)	1,495	752	50.3%	445

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

## Section 1: Results Based on Business Activities

### 1. Overall Outline of Survey Results

- The number of companies engaged in the information and communications business (meaning companies that engages in this business, whether as their main business or not) was 4,763. The total number of establishments was 21,793 and the total number of workers was 1,393,296.
- The total sales from this business were 40.5132 trillion yen (the total sales for these 4,763 companies were 60.5006 trillion yen) in FY2010. Among this, total sales from the information and communications businesses by companies that responded to the survey for the second consecutive year were 36.5827 trillion yen (down 1.7%)
- Operating profit was 4.5794 trillion yen, ordinary profit was 4.1854 trillion yen, and the number of subsidiaries and affiliated companies owned was 7,581.

Fig. 1-1-1 Overall Outline

		Number of companies	Number of establishments	Number of workers (persons)	Number of regular workers (persons)	Sales		Operating profit (100 million yen)	Ordinary profit (100 million yen)	Number of subsidiaries and affiliated companies owned
						(100 million yen)	Sales from the relevant business (100 million yen)			
Overall	FY2009	4,977	19,171	1,233,334	1,224,729	500,828	412,533	33,323	33,760	6,554
	FY2010	4,763	21,793	1,393,296	1,387,453	605,006	405,132	45,794	41,854	7,581
	Year-on-year (%)	-4.3	13.7	13.0	13.3	20.8	-1.8	37.4	24.0	15.7
Telecommunications	FY2009	423	2,227	177,414	176,916	195,714	155,669	19,371	19,040	812
	FY2010	314	2,133	213,663	213,512	240,416	156,659	28,072	23,432	875
	Year-on-year (%)	-25.8	-4.2	20.4	20.7	22.8	0.6	44.9	23.1	7.8
Private broadcasting	FY2009	454	1,206	33,622	32,840	27,350	23,872	1,459	1,104	436
	FY2010	312	1,022	30,785	30,209	21,883	17,724	1,526	1,308	474
	Year-on-year (%)	-31.3	-15.3	-8.4	-8.0	-20.0	-25.8	4.6	18.5	8.7
Cablecasting	FY2009	240	530	16,793	16,505	7,286	4,269	1,240	1,161	60
	FY2010	180	474	16,356	16,225	8,000	4,439	1,156	860	114
	Year-on-year (%)	-25.0	-10.6	-2.6	-1.7	9.8	4.0	-6.8	-25.9	90.0
Software	FY2009	2,628	8,613	687,023	686,465	170,866	92,823	6,931	7,743	2,946
	FY2010	2,597	9,223	736,269	734,696	181,864	101,811	7,886	8,646	3,101
	Year-on-year (%)	-1.2	7.1	7.2	7.0	6.4	9.7	13.8	11.7	5.3
Data processing & information services	FY2009	1,428	6,820	511,718	509,112	135,833	54,875	5,696	6,274	2,112
	FY2010	1,491	8,205	553,244	551,754	165,555	56,180	6,398	6,941	2,525
	Year-on-year (%)	4.4	20.3	8.1	8.4	21.9	2.4	12.3	10.6	19.6
Internet based services	FY2009	665	2,615	165,713	164,886	69,951	19,655	5,971	5,495	1,102
	FY2010	648	3,755	227,199	224,709	112,847	16,069	10,011	8,439	1,394
	Year-on-year (%)	-2.6	43.6	37.1	36.3	61.3	-18.2	67.7	53.6	26.5
Video picture information production & distribution	FY2009	510	1,336	44,672	44,112	22,964	7,543	1,272	1,057	542
	FY2010	409	1,036	44,853	44,102	23,356	7,695	1,110	1,287	599
	Year-on-year (%)	-19.8	-22.5	0.4	-0.0	1.7	2.0	-12.7	21.7	10.5
Sound information production	FY2009	82	111	3,418	3,206	1,612	587	31	40	22
	FY2010	79	109	3,722	3,601	1,917	767	106	113	17
	Year-on-year (%)	-3.7	-1.8	8.9	12.3	19.0	30.7	246.8	182.6	-22.7
Newspaper publishers	FY2009	109	1,864	43,053	42,646	18,202	14,996	93	221	647
	FY2010	113	2,176	45,882	45,406	19,152	16,044	483	587	686
	Year-on-year (%)	3.7	16.7	6.6	6.5	5.2	7.0	421.1	165.1	6.0
Other publishers	FY2009	297	2,777	113,487	109,724	46,904	13,867	1,347	1,559	830
	FY2010	304	3,298	119,045	117,315	47,277	14,476	1,850	2,054	1,047
	Year-on-year (%)	2.4	18.8	4.9	6.9	0.8	4.4	37.3	31.7	26.1
Commercial art & graphic design	FY2009	133	282	8,846	8,708	2,210	793	112	53	63
	FY2010	109	220	13,535	13,526	16,224	2,288	449	523	214
	Year-on-year (%)	-18.0	-22.0	53.0	55.3	634.1	188.5	301.3	879.0	239.7
Services incidental to video picture, sound information, character information production & distribution	FY2009	110	315	7,771	7,671	2,089	604	-7	1	66
	FY2010	87	305	8,511	8,466	2,091	577	40	42	57
	Year-on-year (%)	-20.9	-3.2	9.5	10.4	0.1	-4.5	-	3,044.7	-13.6
(Reproduced) TV/radio program production work	FY2009	440	759	22,593	22,120	7,176	3,565	250	267	152
	FY2010	345	546	21,743	21,330	7,129	3,225	278	327	255
	Year-on-year (%)	-21.6	-28.1	-3.8	-3.6	-0.6	-9.5	11.1	22.8	67.8

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

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

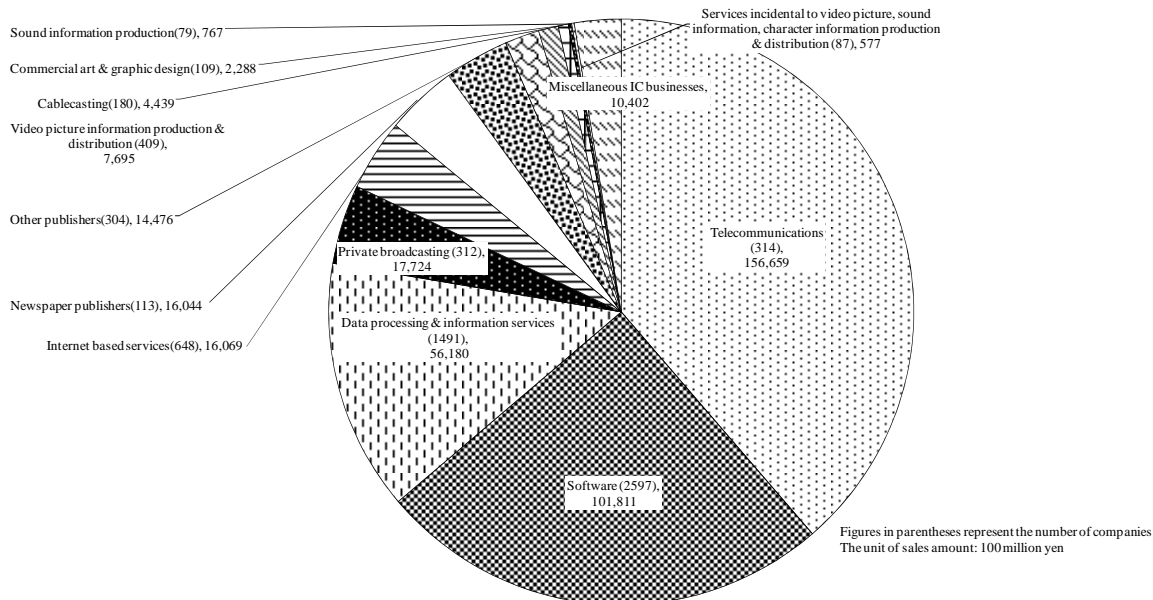
Fig. 1-1-2 Outline of Companies that Responded to the Survey for the Second Consecutive Year

		Number of companies	Number of establishments	Number of workers (persons)	Number of regular workers (persons)	Sales		Operating profit (100 million yen)	Ordinary profit (100 million yen)	Number of subsidiaries and affiliated companies owned
						(100 million yen)	Sales from the relevant business (100 million yen)			
Overall	FY2009	3,790	15,639	1,054,242	1,047,020	451,005	372,062	30,593	31,206	5,675
	FY2010	3,790	15,925	1,047,807	1,043,206	449,202	365,827	38,283	35,537	6,013
	Year-on-year (%)	-	1.8	-0.6	-0.4	-0.4	-1.7	25.1	13.9	6.0

## 2. Sales

- The total sales from the information and communications industry were 40.5132 trillion yen.
- Sales related to the relevant business were the largest for the telecommunications business, followed by software and data processing and information services. These three businesses accounted for 77.7% of the total.

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



**Fig. 1-1-4 Sales of the Information and Communications Industry**

Unit: companies, 100 million yen

	Overall	Telecommunications	Software	Data processing & information services	Private broadcasting	Internet based services	Newspaper publishers	Other publishers	Video picture information production & distribution	Cablecasting	Commercial art & graphic design	Sound information production	Services incidental to video picture, sound information, character information production & distribution	Miscellaneous IC businesses
Number of companies	4,763	314	2,597	1,491	312	648	113	304	409	180	109	79	87	-
Sales from the relevant business	405,132	156,659	101,811	56,180	17,724	16,069	16,044	14,476	7,695	4,439	2,288	767	577	10,402
Composition ratio (%)	100.0	38.7	25.1	13.9	4.4	4.0	4.0	3.6	1.9	1.1	0.6	0.2	0.1	2.6

\* "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 8 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.

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

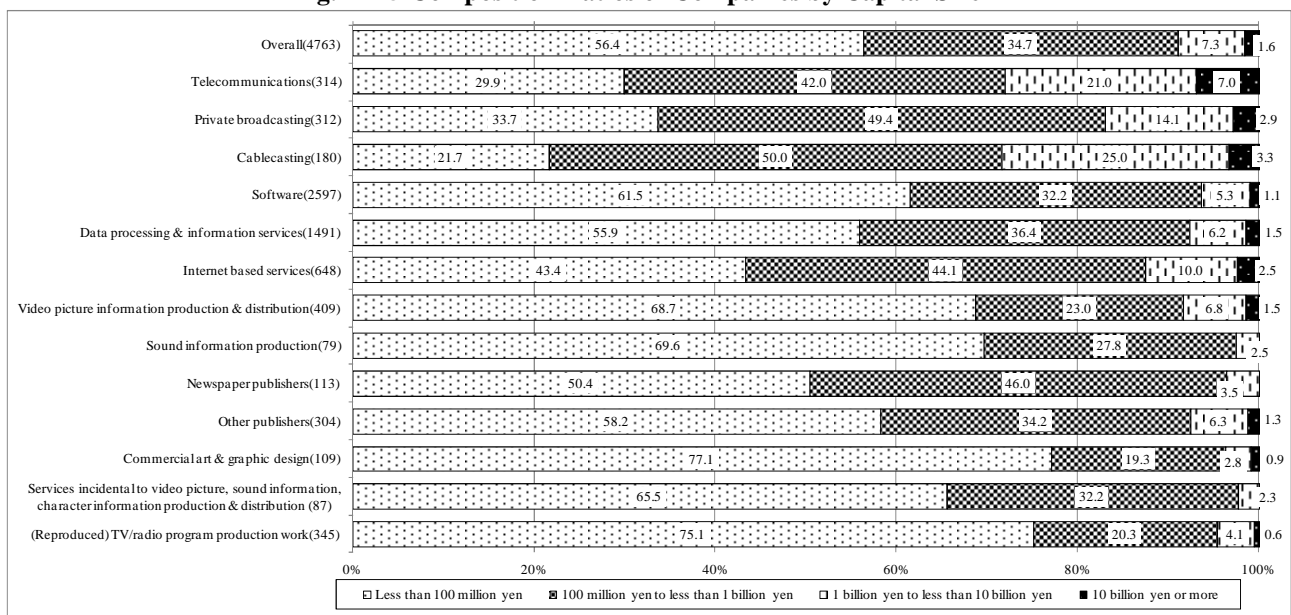
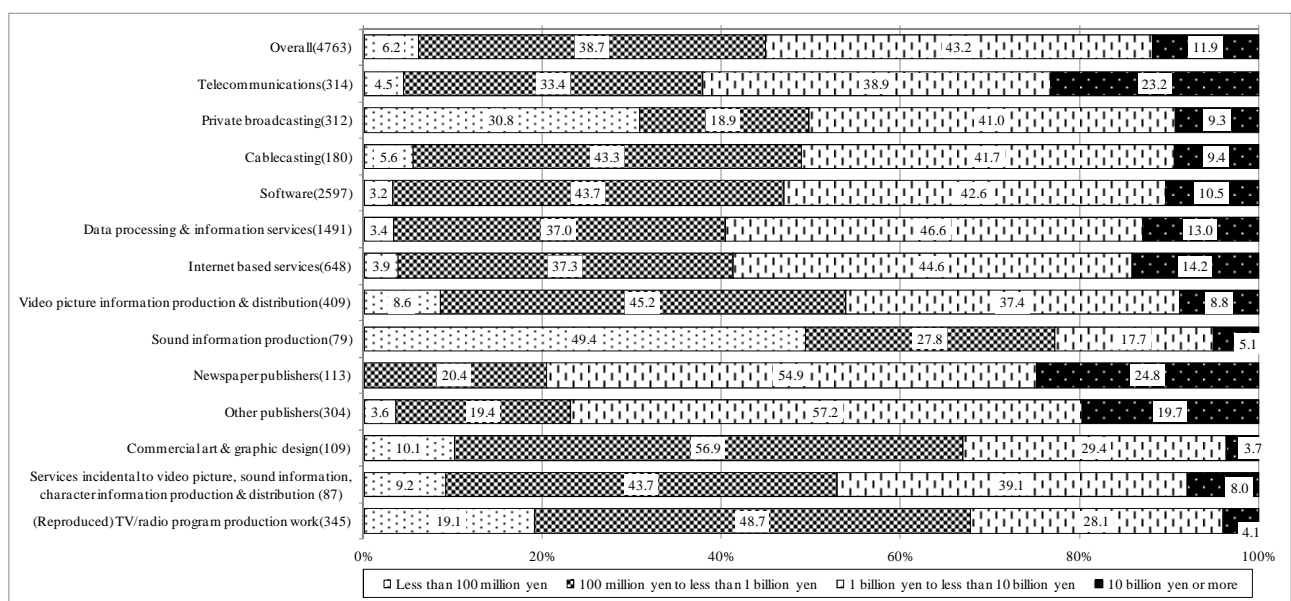
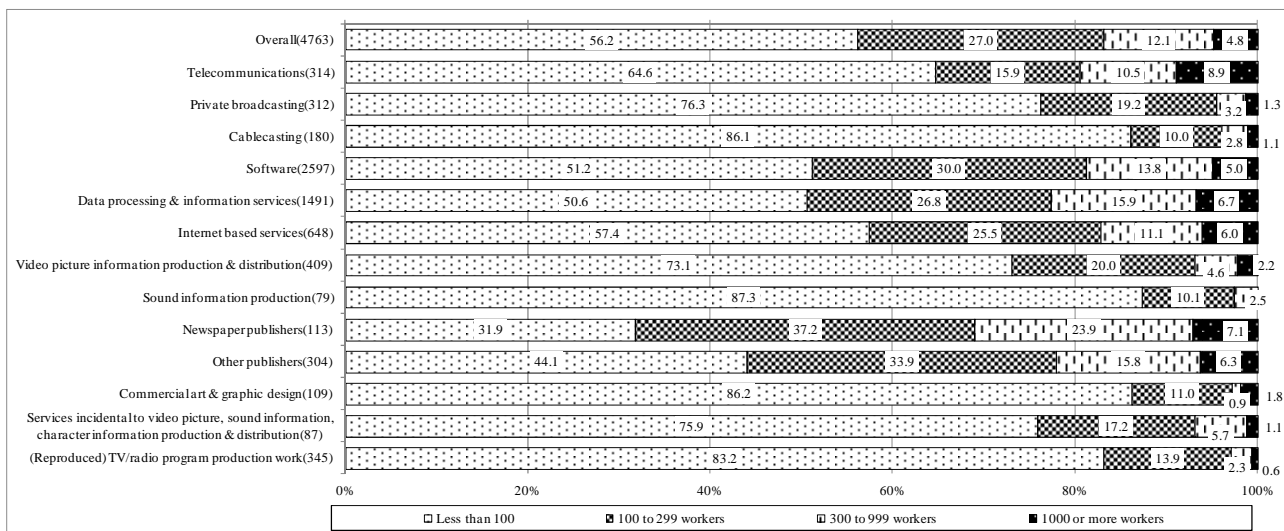


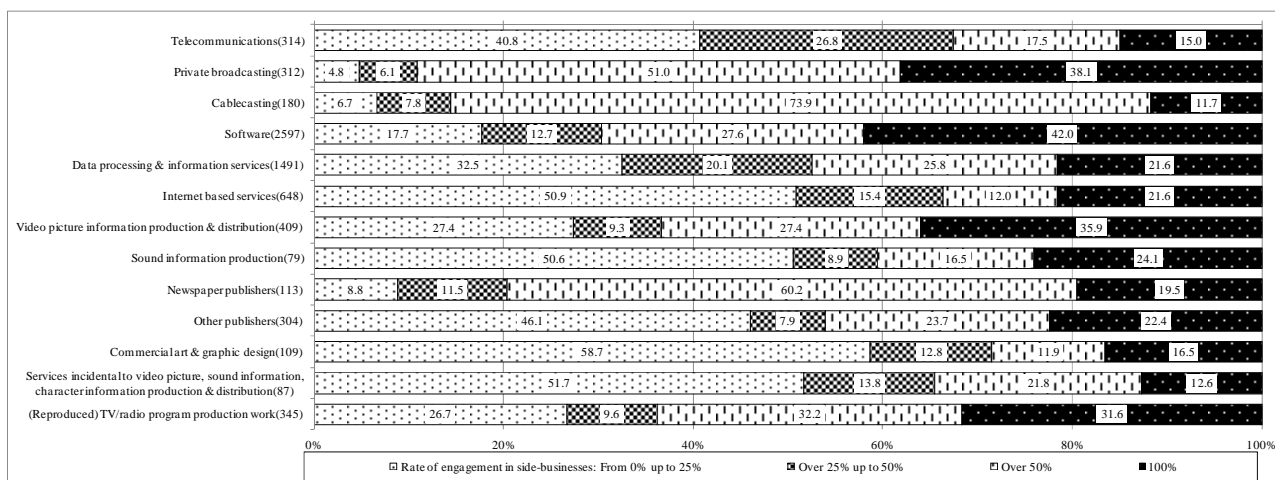
Fig. 1-1-6 Composition Ratios of Companies by Sales



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



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



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



#### 4. Assets and added values

- The total assets per company were 15.53 billion yen and the net assets were 6.57 billion yen. The capital adequacy ratio was 42.3%.
- The value added per company was 3.45 billion yen, the labor productivity was 11.788 million yen/person, the labor share was 41.9%, and the labor equipment ratio was 20.564 million yen/person.

**Fig. 1-1-9 Assets per Company**

	Number of companies		Total assets (Total capital) (million yen)			Net assets (Own capital) (million yen)			Turnover of total capital (times)			Capital adequacy ratio (%)		
	FY2009	FY2010	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Vs. previous fiscal year (times)	FY2009	FY2010	Vs. previous fiscal year (points)
Overall	4,977	4,763	11,679.8	15,528.3	33.0	5,864.1	6,574.4	12.1	0.86	0.82	-0.04	50.2	42.3	-7.9
Telecommunications	423	314	68,302.7	131,495.6	92.5	34,135.1	48,990.3	43.5	0.68	0.58	-0.10	50.0	37.3	-12.7
Private broadcasting	454	312	8,736.9	9,762.3	11.7	6,041.5	6,559.3	8.6	0.69	0.72	0.03	69.1	67.2	-2.0
Cablecasting	240	180	4,785.2	6,964.9	45.6	2,190.6	2,922.3	33.4	0.63	0.64	0.00	45.8	42.0	-3.8
Software	2,628	2,597	5,355.4	5,919.7	10.5	2,362.6	2,633.0	11.4	1.21	1.18	-0.03	44.1	44.5	0.4
Data processing & information services	1,428	1,491	8,102.0	8,485.3	4.7	3,564.9	3,730.6	4.6	1.17	1.31	0.13	44.0	44.0	-0.0
Internet based services	665	648	10,732.8	31,772.8	196.0	5,560.1	7,051.5	26.8	0.98	0.55	-0.43	51.8	22.2	-29.6
Video picture information production & distribution	510	409	5,200.5	6,149.1	18.2	3,330.7	3,737.0	12.2	0.87	0.93	0.06	64.0	60.8	-3.3
Sound information production	82	79	1,354.1	1,578.3	16.6	764.7	695.7	-9.0	1.45	1.54	0.09	56.5	44.1	-12.4
Newspaper publishers	109	113	20,497.7	21,182.2	3.3	9,960.1	9,844.5	-1.2	0.81	0.80	-0.01	48.6	46.5	-2.1
Other publishers	297	304	17,631.7	16,466.7	-6.6	10,047.8	8,875.0	-11.7	0.90	0.94	0.05	57.0	53.9	-3.1
Commercial art & graphic design	133	109	1,003.0	10,591.8	956.0	412.0	4,414.6	971.4	1.66	1.41	-0.25	41.1	41.7	0.6
Services incidental to video picture, sound information, character information production & distribution	110	87	1,609.3	1,934.8	20.2	774.3	1,024.2	32.3	1.18	1.24	0.06	48.1	52.9	4.8
(Reproduced) TV/radio program production work	440	345	1,423.3	1,906.1	33.9	814.9	966.9	18.7	1.15	1.08	-0.06	57.3	50.7	-6.5

(Notes) Turnover of total capital = Sales / Total assets (total capital) (Efficiency index to ascertain how many times the amount of sales is as large as the amount of the total capital invested)  
Capital adequacy ratio = Net assets (own capital) / Total assets (total capital) × 100 (Index to show the percentage of own capital among the total capital and thereby indicate the financial security)

**Fig. 1-1-10 Added Value per Company**

	Number of companies		Value added (million yen)			Labor productivity (10,000 yen/person)			Labor share (%)			Labor equipment ratio (10,000 yen/person)		
	FY2009	FY2010	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Vs. previous fiscal year (points)	FY2009	FY2010	Year-on-year (%)
Overall	4,977	4,763	2,979.3	3,448.4	15.7	1,202.3	1,178.8	-1.9	44.7	41.9	-2.8	1,617.8	2,056.4	27.1
Telecommunications	423	314	11,595.2	16,701.2	44.0	2,764.6	2,454.4	-11.2	21.4	11.6	-9.8	8,045.8	10,542.2	31.0
Private broadcasting	454	312	1,421.4	1,558.7	9.7	1,919.3	1,579.7	-17.7	43.5	34.0	-9.5	4,412.0	3,499.1	-20.7
Cablecasting	240	180	1,192.9	1,731.2	45.1	1,704.9	1,905.3	11.8	22.7	17.4	-5.3	3,752.0	4,246.5	13.2
Software	2,628	2,597	2,335.6	2,550.6	9.2	893.4	899.7	0.7	60.2	61.1	0.9	274.7	284.5	3.6
Data processing & information services	1,428	1,491	3,060.6	3,240.7	5.9	854.1	873.4	2.3	54.8	56.0	1.2	386.1	380.4	-1.5
Internet based services	665	648	3,510.7	3,762.3	7.2	1,408.8	1,073.1	-23.8	40.2	37.2	-3.0	837.0	4,511.4	439.0
Video picture information production & distribution	510	409	1,118.2	1,293.0	15.6	1,276.6	1,179.1	-7.6	48.6	50.4	1.8	1,855.6	1,558.9	-16.0
Sound information production	82	79	284.7	544.2	91.1	683.1	1,155.0	69.1	66.1	51.8	-14.3	390.5	693.8	77.7
Newspaper publishers	109	113	5,707.4	5,713.4	0.1	1,445.0	1,407.1	-2.6	58.8	56.7	-2.1	2,235.0	2,297.5	2.8
Other publishers	297	304	3,500.7	3,527.4	0.8	916.2	900.8	-1.7	54.4	52.8	-1.6	1,097.6	984.4	-10.3
Commercial art & graphic design	133	109	544.4	1,817.1	233.8	818.5	1,463.3	78.8	61.6	53.7	-7.9	391.4	1,855.5	374.0
Services incidental to video picture, sound information, character information production & distribution	110	87	595.8	804.3	35.0	843.4	822.1	-2.5	71.4	63.7	-7.7	679.9	495.9	-27.1
(Reproduced) TV/radio program production work	440	345	455.3	573.4	25.9	886.7	909.8	2.6	60.9	60.6	-0.3	764.7	807.0	5.5

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

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

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

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

## 5. Workers

- The number of workers was 1,393,296, out of which full-time workers/regular staff members (hereinafter referred to as “full-time workers”) were 1,182,196, accounting for 84.8% of the total. The number of part-timers was 126,436 and that of dispatched workers was 122,361.
- The number of workers per company was 293, out of which 248 were full-time workers and 27 were part-timers.

**Fig. 1-1-11 Number of workers**

(Unit: companies, persons)

	Number of companies		Number of workers		Number of regular workers		Full-time workers/ Regular staff members		Part-timers		Other regular workers		Dispatched workers	
	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010
Overall	4,977	4,763	1,233,334	1,393,296	1,224,729	1,387,453	1,066,236	1,182,196	110,132	126,436	48,361	78,821	119,717	122,361
Year-on-year (%)	-	-4.3	-	13.0	-	13.3	-	10.9	-	14.8	-	63.0	-	2.2
Telecommunications	423	314	177,414	213,663	176,916	213,512	147,267	159,579	14,805	16,998	14,844	36,935	31,978	26,100
Private broadcasting	454	312	33,622	30,785	32,840	30,209	29,006	20,521	2,288	5,136	1,546	4,552	6,926	4,447
Cablecasting	240	180	16,793	16,356	16,505	16,225	13,794	14,032	1,845	1,567	866	626	2,167	2,467
Software	2,628	2,597	687,023	736,269	686,465	734,696	639,232	686,714	29,020	30,223	18,213	17,759	58,129	60,264
Data processing & information services	1,428	1,491	511,718	553,244	509,112	551,754	427,258	458,510	67,761	78,111	14,093	15,133	53,373	57,755
Internet based services	665	648	165,713	227,199	164,886	224,709	140,585	193,555	12,013	24,091	12,288	7,063	21,999	23,499
Video picture information production & distribution	510	409	44,672	44,853	44,112	44,102	36,271	35,954	5,507	4,982	2,334	3,166	4,225	6,157
Sound information production	82	79	3,418	3,722	3,206	3,601	2,749	3,212	202	265	255	124	161	327
Newspaper publishers	109	113	43,053	45,882	42,646	45,406	39,284	41,318	2,412	2,928	950	1,160	2,151	1,978
Other publishers	297	304	113,487	119,045	109,724	117,315	90,635	96,575	16,347	16,779	2,742	3,961	3,557	4,097
Commercial art & graphic design	133	109	8,846	13,535	8,708	13,526	7,210	11,140	786	484	712	1,902	617	1,362
Services incidental to video picture, sound information, character information production & distribution	110	87	7,771	8,511	7,671	8,466	6,704	6,715	680	777	287	974	690	596
(Reproduced) TV/radio program production work	440	345	22,593	21,743	22,120	21,330	19,649	18,118	1,276	1,072	1,195	2,140	1,848	1,990

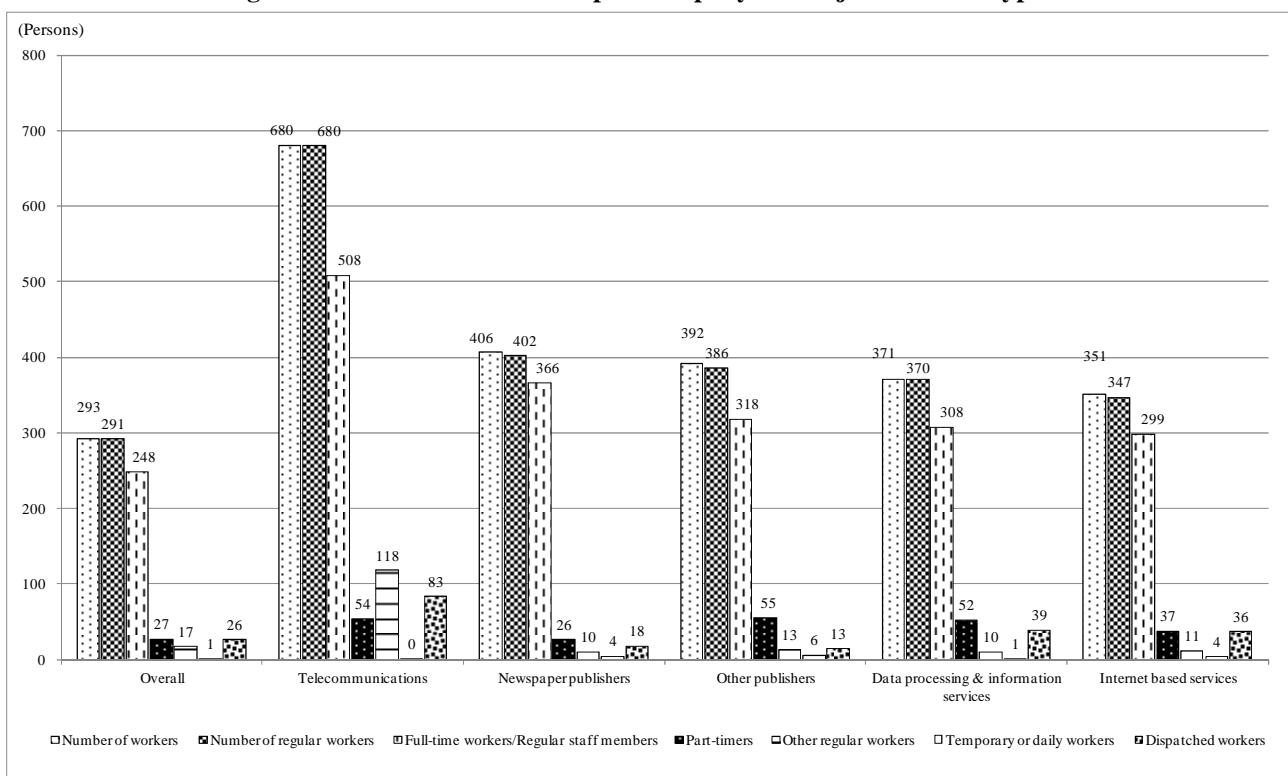
(Note) Other regular workers = Number of regular workers – Full time workers/Regular staff members – Part-timers (meaning paid directors and contract workers, etc.)

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

(Unit: companies, persons)

	Number of companies		Number of workers		Number of regular workers		Full-time workers/ Regular staff members		Part-timers		Other regular workers		Dispatched workers	
	FY 2009	FY 2010	FY 2009	FY 2010	FY 2009	FY 2010	FY 2009	FY 2010	FY 2009	FY 2010	FY 2009	FY 2010	FY 2009	FY 2010
Overall	3,790	3,790	1,054,242	1,047,807	1,047,020	1,043,206	930,538	906,538	74,864	73,613	41,618	63,055	99,123	92,841
Year-on-year (%)	-	-	-	-0.6	-	-0.4	-	-2.6	-	-1.7	-	51.5	-	-6.3

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



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

### 1. Outline of survey results

- The number of companies rated as information and communications companies (IC companies) (meaning companies for which their sales from the information and communications business are rated as being the largest) was 4,114 in FY2010. The number of establishments was 15,377 and the number of regular workers was 1,029,324.
- The total sales by IC companies were 40.9675 trillion yen, and the sales from the information and communications business were 37.9207 trillion yen. The operating profit was 3.6576 trillion yen and the ordinary profit was 3.3351 trillion yen. The number of subsidiaries and affiliated companies owned was 5,219.

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

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

		Number of companies	Number of establishments	Number of workers (persons)	Number of regular workers (persons)	Sales (100 million yen)	Sales from the IC business (100 million yen)	Operating profit (100 million yen)	Ordinary profit (100 million yen)	Number of subsidiaries and affiliated companies owned
Total	FY2009	4,977	19,171	1,233,334	1,224,729	500,828	412,533	33,323	33,760	6,554
	FY2010	4,763	21,793	1,393,296	1,387,453	605,006	405,132	45,794	41,854	7,581
	Year-on-year (%)	-4.3	13.7	13.0	13.3	20.8	-1.8	37.4	24.0	15.7
IC companies	FY2009	4,475	14,723	957,212	951,647	407,130	389,292	30,335	30,287	4,902
	FY2010	4,114	15,377	1,033,635	1,029,324	409,675	379,207	36,576	33,351	5,219
	Year-on-year (%)	-8.1	4.4	8.0	8.2	0.6	-2.6	20.6	10.1	6.5
Telecommunications	FY2009	120	716	111,699	111,688	173,427	169,175	17,189	16,940	530
	FY2010	108	732	116,411	116,314	162,067	157,784	22,450	18,930	302
	Year-on-year (%)	-10.0	2.2	4.2	4.1	-6.6	-6.7	30.6	11.7	-43.0
Private broadcasting	FY2009	418	1,161	31,778	31,113	26,554	25,617	1,352	1,015	367
	FY2010	288	704	23,763	23,232	20,141	19,255	1,335	1,089	340
	Year-on-year (%)	-31.1	-39.4	-25.2	-25.3	-24.2	-24.8	-1.3	7.3	-7.4
Cablecasting	FY2009	214	330	12,429	12,146	5,993	5,965	997	922	52
	FY2010	158	413	13,450	13,418	6,370	6,351	894	627	78
	Year-on-year (%)	-26.2	25.2	8.2	10.5	6.3	6.5	-10.3	-32.0	50.0
Software	FY2009	1,970	5,471	435,806	435,480	84,116	78,605	4,315	4,499	1,522
	FY2010	1,907	5,492	474,630	474,001	104,373	90,432	5,104	5,581	1,796
	Year-on-year (%)	-3.2	0.4	8.9	8.8	24.1	15.0	18.3	24.0	18.0
Data processing & information services	FY2009	783	3,212	220,863	220,117	58,184	54,868	3,664	3,903	812
	FY2010	803	4,045	265,702	265,007	61,767	54,650	3,495	3,626	954
	Year-on-year (%)	2.6	25.9	20.3	20.4	6.2	-0.4	-4.6	-7.1	17.5
Internet based services	FY2009	273	639	41,314	41,206	17,743	17,160	1,635	1,648	344
	FY2010	234	530	34,676	34,606	11,598	10,760	1,398	1,244	352
	Year-on-year (%)	-14.3	-17.1	-16.1	-16.0	-34.6	-37.3	-14.5	-24.5	2.3
Video picture information production & distribution	FY2009	355	540	21,655	21,392	7,018	6,216	310	364	272
	FY2010	272	472	21,531	21,173	7,809	6,784	404	510	385
	Year-on-year (%)	-23.4	-12.6	-0.6	-1.0	11.3	9.1	30.3	40.1	41.5
TV program production	FY2009	275	389	14,022	13,855	3,812	3,600	118	123	63
	FY2010	204	310	13,347	13,071	3,560	3,265	115	166	176
	Year-on-year (%)	-25.8	-20.3	-4.8	-5.7	-6.6	-9.3	-2.5	35.0	179.4
Sound information production	FY2009	25	28	1,009	902	636	633	18	21	6
	FY2010	35	43	1,101	1,092	1,076	983	74	77	5
	Year-on-year (%)	40.0	53.6	9.1	21.1	69.2	55.3	311.1	266.7	-16.7
Radio program production	FY2009	20	23	377	270	48	45	2	2	-
	FY2010	31	35	563	554	176	176	7	7	1
	Year-on-year (%)	55.0	52.2	49.3	105.2	266.7	291.1	250.0	250.0	-
Newspaper publishers	FY2009	87	1,732	39,312	38,929	17,010	15,192	78	196	577
	FY2010	93	2,013	42,525	42,058	18,093	16,463	446	539	628
	Year-on-year (%)	6.9	16.2	8.2	8.0	6.4	8.4	471.8	175.0	8.8
Other publishers	FY2009	148	640	34,822	32,258	15,007	14,480	751	805	362
	FY2010	145	691	35,014	33,598	15,372	14,852	987	1,133	342
	Year-on-year (%)	-2.0	8.0	0.6	4.2	2.4	2.6	31.4	40.7	-5.5
Commercial art & graphic design	FY2009	48	81	3,367	3,303	833	802	64	7	23
	FY2010	36	71	1,546	1,546	421	399	14	13	11
	Year-on-year (%)	-25.0	-12.3	-54.1	-53.2	-49.5	-50.2	-78.1	85.7	-52.2
Services incidental to video picture, sound information, character information production & distribution	FY2009	34	173	3,158	3,113	610	579	-38	-33	35
	FY2010	35	171	3,286	3,279	587	494	-25	-20	26
	Year-on-year (%)	2.9	-1.2	4.1	5.3	-3.8	-14.7	-	-	-25.7
Manufacturing companies	FY2009	71	541	82,168	81,890	44,649	16,143	410	901	880
	FY2010	132	1,091	83,989	83,377	31,472	11,337	723	997	717
	Year-on-year (%)	85.9	101.7	2.2	1.8	-29.5	-29.8	76.3	10.7	-18.5
Wholesalers & retailers	FY2009	145	1,144	49,699	49,379	15,566	2,067	307	377	359
	FY2010	198	2,401	73,739	73,016	59,516	8,394	1,743	1,584	598
	Year-on-year (%)	36.6	109.9	48.4	47.9	282.3	306.1	467.8	320.2	66.6
Service companies	FY2009	109	689	52,689	52,677	6,085	947	189	210	67
	FY2010	136	1,070	65,822	65,699	8,522	1,336	339	349	66
	Year-on-year (%)	24.8	55.3	24.9	24.7	40.0	41.1	79.4	66.2	-1.5
Other	FY2009	177	2,074	91,566	89,136	27,398	4,085	2,081	1,984	346
	FY2010	183	1,854	136,111	136,037	95,822	4,858	6,413	5,574	981
	Year-on-year (%)	3.4	-10.6	48.6	52.6	249.7	18.9	208.2	180.9	183.5

- The number of establishments per IC company was 3.7 (up 0.4 establishments), and the number of regular workers was 250 (up 17.4%).
- Sales per IC company were 9.96 billion yen (up 9.5%), and sales from the information and communications business were 9.22 billion yen (up 6.0%). The operating profit was 889 million yen (up 31.2%) and the ordinary profit was 811 million yen (up 19.8%). The number of subsidiaries and affiliated companies owned was 4.2 (up 0.2 companies).

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

		Number of establishments	Number of workers (persons)	Number of regular workers (persons)	Sales (million yen)	Sales from the IC business (million yen)	Operating profit (million yen)	Ordinary profit (million yen)	Number of subsidiaries and affiliated companies owned
Total	FY2009	3.9	248	246	10,062.8	8,288.8	669.5	678.3	4.8
	FY2010	4.6	293	291	12,702.2	8,505.8	961.4	878.7	5.0
	Year-on-year (%)	0.7	18.1	18.3	26.2	2.6	43.6	29.5	0.2
IC companies	FY2009	3.3	214	213	9,097.9	8,699.3	677.9	676.8	4.0
	FY2010	3.7	251	250	9,958.1	9,217.5	889.1	810.7	4.2
	Year-on-year (%)	0.4	17.3	17.4	9.5	6.0	31.2	19.8	0.2
Telecommunications	FY2009	6.0	931	931	144,522.1	140,979.0	14,324.5	14,116.7	21.2
	FY2010	6.8	1,078	1,077	150,062.0	146,095.9	20,787.5	17,528.0	11.6
	Year-on-year (%)	0.8	15.8	15.7	3.8	3.6	45.1	24.2	-9.6
Private broadcasting	FY2009	2.8	76	74	6,352.6	6,128.5	323.5	242.9	4.0
	FY2010	2.4	83	81	6,993.5	6,685.7	463.4	378.2	3.3
	Year-on-year (%)	-0.4	9.2	9.5	10.1	9.1	43.2	55.7	-0.7
Cablecasting	FY2009	1.5	58	57	2,800.3	2,787.5	466.0	430.9	5.2
	FY2010	2.6	85	85	4,031.7	4,019.5	566.0	396.7	3.7
	Year-on-year (%)	1.1	46.6	49.1	44.0	44.2	21.5	-7.9	-1.5
Software	FY2009	2.8	221	221	4,269.9	3,990.1	219.0	228.4	2.6
	FY2010	2.9	249	249	5,473.2	4,742.1	267.6	292.7	3.1
	Year-on-year (%)	0.1	12.7	12.7	28.2	18.8	22.2	28.2	0.5
Data processing & information services	FY2009	4.1	282	281	7,430.9	7,007.4	467.9	498.5	4.1
	FY2010	5.0	331	330	7,692.1	6,805.7	435.3	451.6	4.7
	Year-on-year (%)	0.9	17.4	17.4	3.5	-2.9	-7.0	-9.4	0.6
Internet based services	FY2009	2.3	151	151	6,499.2	6,285.5	598.9	603.7	4.0
	FY2010	2.3	148	148	4,956.3	4,598.1	597.5	531.5	3.9
	Year-on-year (%)	0.0	-2	-2	-23.7	-26.8	-0.2	-12	-0.1
Video picture information production & distribution	FY2009	1.5	61	60	1,976.9	1,751.1	87.3	102.5	5.0
	FY2010	1.7	79	78	2,871.0	2,494.2	148.5	187.7	5.7
	Year-on-year (%)	0.2	29.5	30.0	45.2	42.4	70.1	83.1	0.7
TV program production	FY2009	1.4	51	50	1,386.1	1,309.0	42.7	44.6	2.2
	FY2010	1.5	65	64	1,744.9	1,600.5	56.4	81.2	3.7
	Year-on-year (%)	0.1	27.5	28.0	25.9	22.3	32.1	82.1	1.5
Sound information production	FY2009	1.1	40	36	2,543.4	2,531.0	71.8	82.7	3.0
	FY2010	1.2	31	31	3,073.8	2,809.4	212.5	220.7	1.7
	Year-on-year (%)	0.1	-22.5	-13.9	20.9	11.0	196.0	166.9	-1.3
Radio program production	FY2009	1.2	19	14	240.2	224.7	9.1	9.8	-
	FY2010	1.1	18	18	568.0	567.7	22.4	22.9	1.0
	Year-on-year (%)	-0.1	-5.3	28.6	136.5	152.6	146.2	133.7	-
Newspaper publishers	FY2009	19.9	452	447	19,552.2	17,462.1	89.4	225.4	9.6
	FY2010	21.6	457	452	19,455.3	17,702.4	479.4	579.5	10.6
	Year-on-year (%)	1.7	1.1	1.1	-0.5	1.4	436.2	157.1	1.0
Other publishers	FY2009	4.3	235	218	10,139.8	9,784.1	507.6	544.1	4.7
	FY2010	4.8	241	232	10,601.6	10,242.6	680.8	781.7	4.4
	Year-on-year (%)	0.5	2.6	6.4	4.6	4.7	34.1	43.7	-0.3
Commercial art & graphic design	FY2009	1.7	70	69	1,735.2	1,670.7	133.0	14.5	2.1
	FY2010	2.0	43	43	1,169.7	1,109.5	38.9	37.3	1.6
	Year-on-year (%)	0.3	-38.6	-37.7	-32.6	-33.6	-70.8	157.2	-0.5
Services incidental to video picture, sound information, character information production & distribution	FY2009	5.1	93	92	1,795.1	1,702.4	-111.4	-98.4	3.5
	FY2010	4.9	94	94	1,677.0	1,411.1	-72.1	-57.4	2.6
	Year-on-year (%)	-0.2	1.1	2.2	-6.6	-17.1	-	-	-0.9
Manufacturing companies	FY2009	7.6	1,157	1,153	62,885.3	22,736.2	578.0	1,269.6	29.3
	FY2010	8.3	636	632	23,842.4	8,588.5	547.5	755.5	10.0
	Year-on-year (%)	0.7	-45	-45.2	-62.1	-62.2	-5.3	-40.5	-19.3
Wholesalers & retailers	FY2009	7.9	343	341	10,735.2	1,425.3	212.0	260.2	6.6
	FY2010	12.1	372	369	30,058.4	4,239.3	880.3	800.2	6.4
	Year-on-year (%)	4.2	8.5	8.2	180.0	197.4	315.2	207.5	-0.2
Service companies	FY2009	6.3	483	483	5,582.5	868.9	173.7	192.3	2.6
	FY2010	7.9	484	483	6,265.9	982.5	249.4	256.3	2.1
	Year-on-year (%)	1.6	0.2	0.0	12.2	13.1	43.6	33.3	-0.5
Other	FY2009	11.7	517	504	15,479.2	2,308.1	1,175.7	1,121.1	7.4
	FY2010	10.1	744	743	52,361.5	2,654.7	3,504.1	3,045.7	13.8
	Year-on-year (%)	-1.6	43.9	47.4	238.3	15.0	198.0	171.7	6.4

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

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

## 2. Number of companies

- When looking at the composition ratio for the number of IC companies as a comparison with the previous fiscal year, the number of companies that are categorized as “Less than 100 million yen” by capital size increased by 0.3 points. By sales, the number of companies that are categorized as “1 billion yen to less than 10 billion yen” increased by 1.4 points. By number of regular workers, companies categorized as “100 to 299 workers” increased by 2.8 points.
- By capital size, when looking at the number of IC companies in terms of the composition ratio, the percentage of companies categorized as “Less than 100 million yen” was 56.7% while companies categorized as “100 million yen to less than 1 billion yen” made up 34.7%. By sales, the percentage of companies categorized as “1 billion yen to less than 10 billion yen” was 41.5%, those categorized as “100 million yen to less than 1 billion yen” was 41.3%. By number of regular workers, 59.1% of companies had “Less than 100 workers” and 25.9% had “100 to 299 workers.”

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

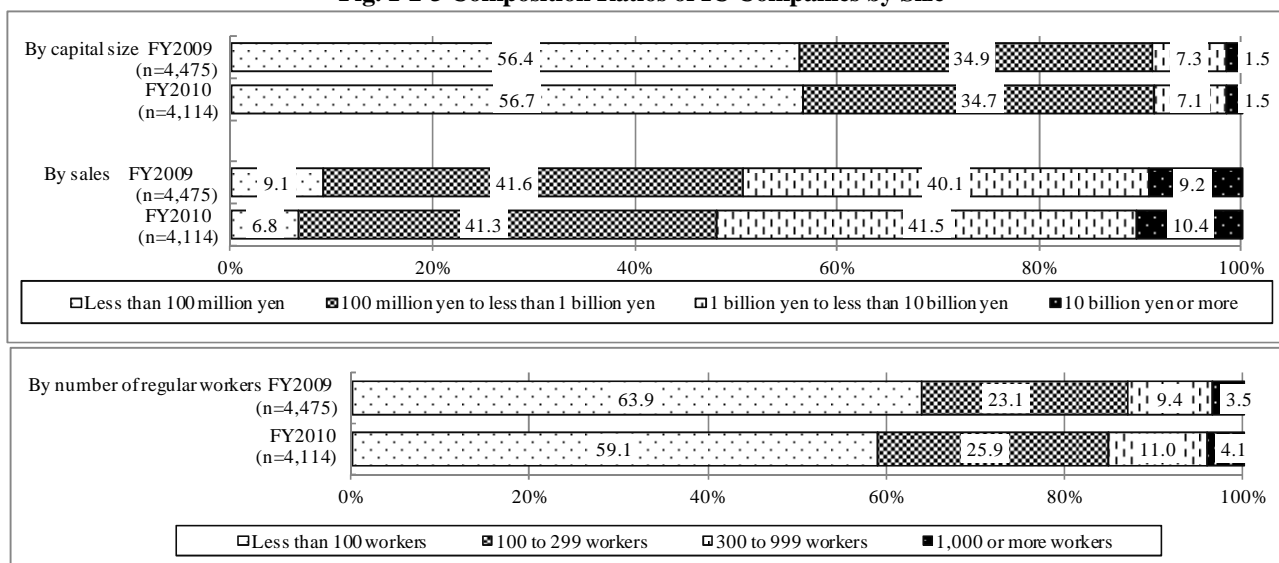
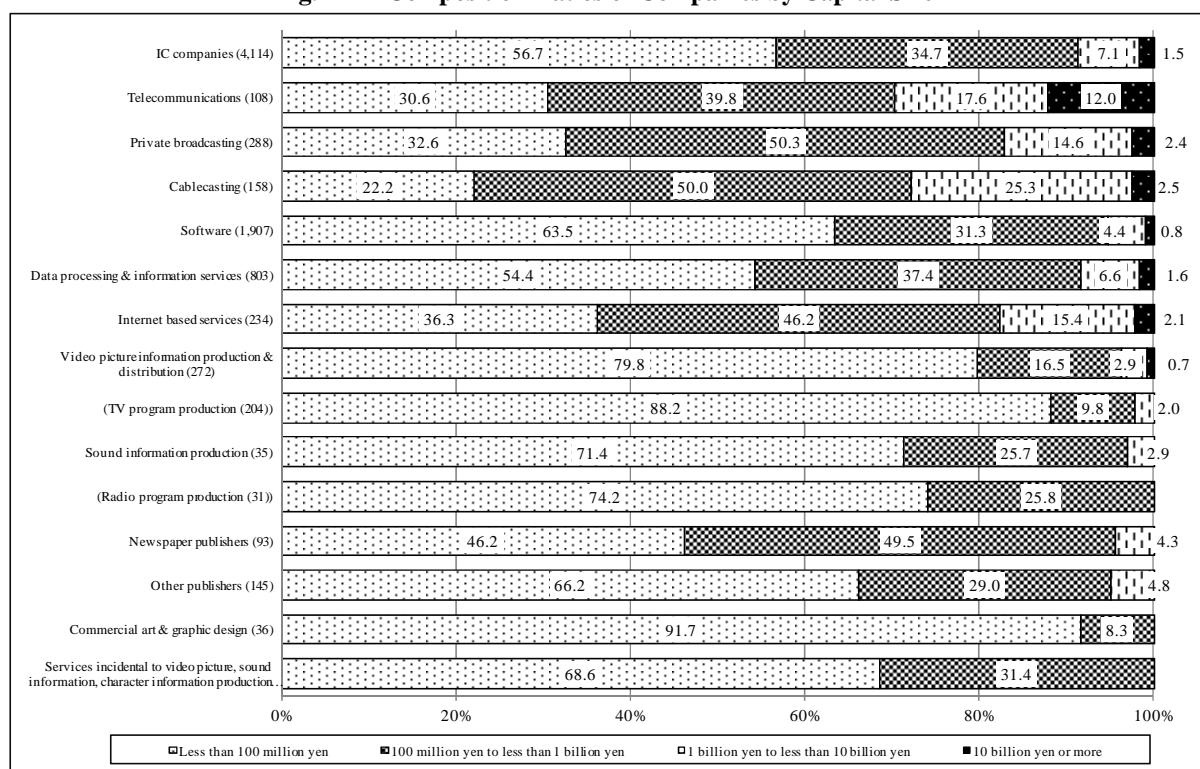
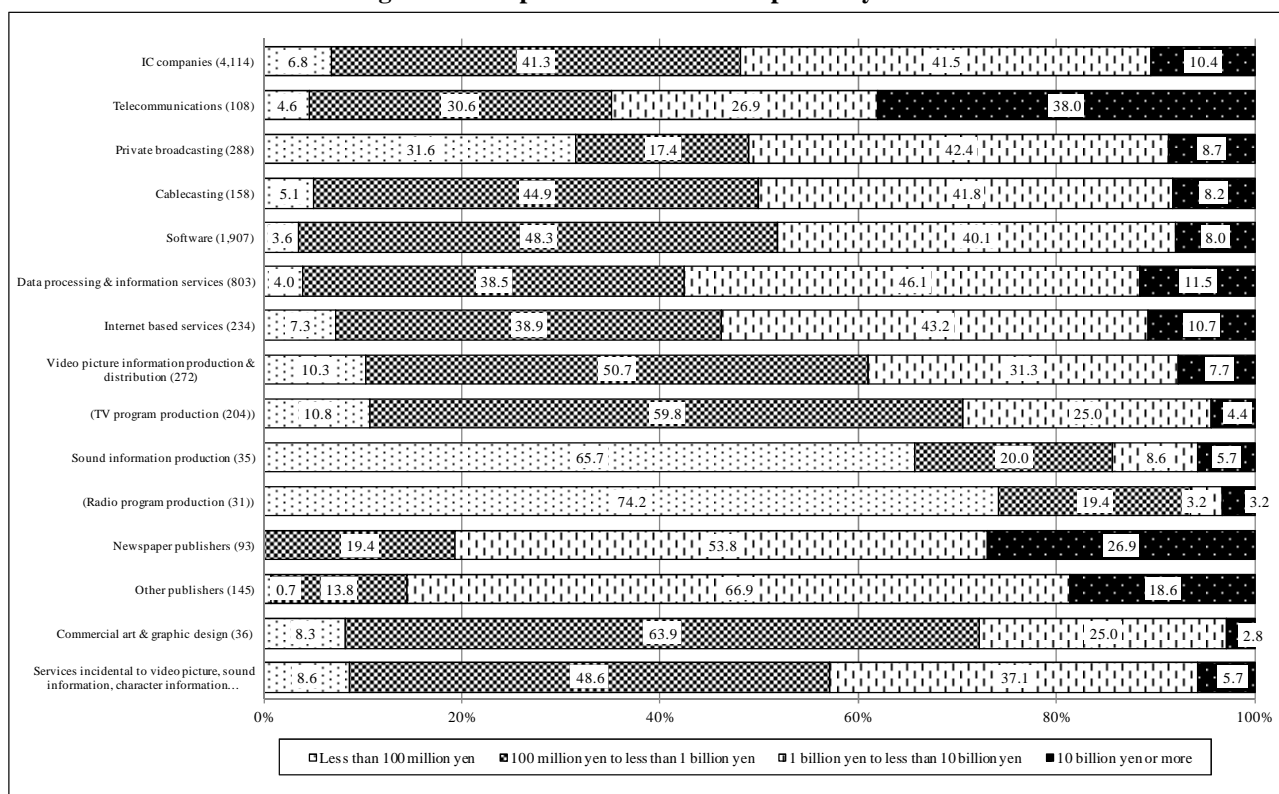


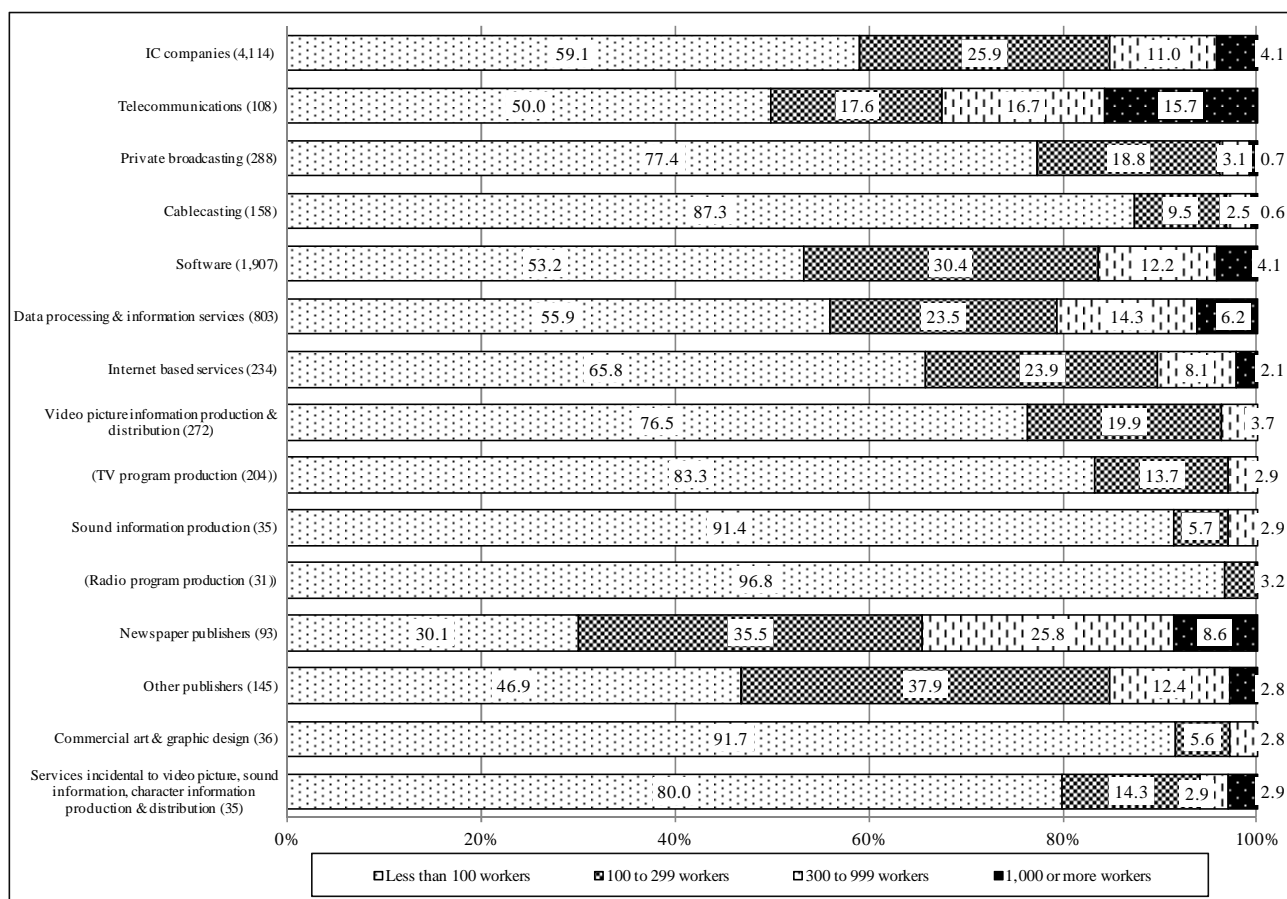
Fig. 1-2-4 Composition Ratios of Companies by Capital Size



**Fig. 1-2-5 Composition Ratios of Companies by Sales**



**Fig. 1-2-6 Composition Ratios of Companies by Number of Regular Workers**



### 3. Sales and profits

- The sales per IC company were 9.96 billion yen (up 9.5%). The sales from the information and communications business were 9.22 billion yen (up 6.0%), making up 92.6% of sales (down 3.0 points).
- The operating profit per IC company was 889 million yen (up 31.2%), and ordinary profit per IC company was 811 million yen (up 19.8%). Current net income per IC company was 450 million yen (up 24.6%).
- The operating margin was 8.9% (increase of 1.4 points), the operating profit on sales was 8.1% (increase of 0.7 points), and the income margin was 4.5% (increase of 0.5 points).

**Fig. 1-2-7 Sales per Company**

	Number of companies		Sales (million yen)			Sales from the information and communications business (million yen)			Percentage among total sales (%)		
	FY2009	FY2010	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Vs. previous fiscal year (points)
Total	4,977	4,763	10,062.8	12,702.2	26.2	8,288.8	8,505.8	2.6	82.4	67.0	-15.4
IC companies	4,475	4,114	9,097.9	9,958.1	9.5	8,699.3	9,217.5	6.0	95.6	92.6	-3.0
Telecommunications	120	108	144,522.1	150,062.0	3.8	140,979.0	146,095.9	3.6	97.5	97.4	-0.1
Private broadcasting	418	288	6,352.6	6,993.5	10.1	6,128.5	6,685.7	9.1	96.5	95.6	-0.9
Cablecasting	214	158	2,800.3	4,031.7	44.0	2,787.5	4,019.5	44.2	99.5	99.7	0.2
Software	1,970	1,907	4,269.9	5,473.2	28.2	3,990.1	4,742.1	18.8	93.4	86.6	-6.8
Data processing & information services	783	803	7,430.9	7,692.1	3.5	7,007.4	6,805.7	-2.9	94.3	88.5	-5.8
Internet based services	273	234	6,499.2	4,956.3	-23.7	6,285.5	4,598.1	-26.8	96.7	92.8	-3.9
Video picture information production & distribution	355	272	1,976.9	2,871.0	45.2	1,751.1	2,494.2	42.4	88.6	86.9	-1.7
TV program production	275	204	1,386.1	1,744.9	25.9	1,309.0	1,600.5	22.3	94.4	91.7	-2.7
Sound information production	25	35	2,543.4	3,073.8	20.9	2,531.0	2,809.4	11.0	99.5	91.4	-8.1
Radio program production	20	31	240.2	568.0	136.5	224.7	567.7	152.6	93.5	99.9	6.4
Newspaper publishers	87	93	19,552.2	19,455.3	-0.5	17,462.1	17,702.4	1.4	89.3	91.0	1.7
Other publishers	148	145	10,139.8	10,601.6	4.6	9,784.1	10,242.6	4.7	96.5	96.6	0.1
Commercial art & graphic design	48	36	1,735.2	1,169.7	-32.6	1,670.7	1,109.5	-33.6	96.3	94.9	-1.4
Services incidental to video picture, sound information, character information production & distribution	34	35	1,795.1	1,677.0	-6.6	1,702.4	1,411.1	-17.1	94.8	84.1	-10.7
Manufacturing companies	71	132	62,885.3	23,842.4	-62.1	22,736.2	8,588.5	-62.2	36.2	36.0	-0.2
Wholesalers & retailers	145	198	10,735.2	30,058.4	180.0	1,425.3	4,239.3	197.4	13.3	14.1	0.8
Service companies	109	136	5,582.5	6,265.9	12.2	868.9	982.5	13.1	15.6	15.7	0.1
Other	177	183	15,479.2	52,361.5	238.3	2,308.1	2,654.7	15.0	14.9	5.1	-9.8

**Fig. 1-2-8 Profits per Company**

	Operating profit (million yen)			Ordinary profit (million yen)			Current net income (million yen)			Operating margin (%)			Operating profit on sales (%)			Income margin (%)		
	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Vs. previous fiscal year (points)	FY2009	FY2010	Vs. previous fiscal year (points)	FY2009	FY2010	Vs. previous fiscal year (points)
Total	669.5	961.4	43.6	678.3	878.7	29.5	384.3	191.2	-50.2	6.7	7.6	0.9	6.7	6.9	0.2	3.8	1.5	-2.3
IC companies	677.9	889.1	31.2	676.8	810.7	19.8	361.4	450.4	24.6	7.5	8.9	1.4	7.4	8.1	0.7	4.0	4.5	0.5
Telecommunications	14,324.5	20,787.5	45.1	14,116.7	17,528.0	24.2	7,427.2	10,107.9	36.1	9.9	13.9	4.0	9.8	11.7	1.9	5.1	6.7	1.6
Private broadcasting	323.5	463.4	43.2	242.9	378.2	55.7	129.3	179.3	38.7	5.1	6.6	1.5	3.8	5.4	1.6	2.0	2.6	0.6
Cablecasting	466.0	566.0	21.5	430.9	396.7	-7.9	161.7	176.7	9.3	16.6	14.0	-2.6	15.4	9.8	-5.6	5.8	4.4	-1.4
Software	219.0	267.6	22.2	228.4	292.7	28.2	115.3	166.4	44.3	5.1	4.9	-0.2	5.3	5.3	0.0	2.7	3.0	0.3
Data processing & information services	467.9	435.3	-7.0	498.5	451.6	-9.4	282.5	237.6	-15.9	6.3	5.7	-0.6	6.7	5.9	-0.8	3.8	3.1	-0.7
Internet based services	598.9	597.5	-0.2	603.7	531.5	-12.0	400.0	302.4	-24.4	9.2	12.1	2.9	9.3	10.7	1.4	6.2	6.1	-0.1
Video picture information production & distribution	87.3	148.5	70.1	102.5	187.7	83.1	49.4	76.6	55.1	4.4	5.2	0.8	5.2	6.5	1.3	2.5	2.7	0.2
TV program production	42.7	56.4	32.1	44.6	81.2	82.1	20.1	24.5	21.9	3.1	3.2	0.1	3.2	4.7	1.5	1.4	1.4	0.0
Sound information production	71.8	212.5	196.0	82.7	220.7	166.9	5.8	127.1	2,091.4	2.8	6.9	4.1	3.3	7.2	3.9	0.2	4.1	3.9
Radio program production	9.1	22.4	146.2	9.8	22.9	133.7	7.1	10.7	50.7	3.8	3.9	0.1	4.1	4.0	-0.1	3.0	1.9	-1.1
Newspaper publishers	89.4	479.4	436.2	225.4	579.5	157.1	82.3	202.6	146.2	0.5	2.5	2.0	1.2	3.0	1.8	0.4	1.0	0.6
Other publishers	507.6	680.8	34.1	544.1	781.7	43.7	399.3	412.0	3.2	5.0	6.4	1.4	5.4	7.4	2.0	3.9	3.9	0.0
Commercial art & graphic design	133.0	38.9	-70.8	14.5	37.3	157.2	-2.6	5.7	-	7.7	3.3	-4.4	0.8	3.2	2.4	-0.2	0.5	0.7
Services incidental to video picture, sound information, character information production & distribution	-111.4	-72.1	-	-98.4	-57.4	-	-116.4	-39.3	-	-6.2	-4.3	1.9	-5.5	-3.4	2.1	-6.5	-2.3	4.2

(Notes) Operating margin = Operating profit / Sales × 100 (Profitability index to ascertain how much profit was obtained from operation activities related to the main business from among total sales)

Operating profit on sales = Ordinary profit / Sales × 100 (Profitability index to ascertain how much profit was obtained from ordinary activities (operations and financial transactions) from among sales)

Income margin = Current net income / Sales × 100 (Profitability index to ascertain how much profit was ultimately obtained by the company)

#### 4. Assets and added value

- The amount of total assets per IC company was 11.88 billion yen (up 8.8%) and net assets was 6.28 billion yen (up 7.4%). The capital adequacy ratio was 52.8% (down 0.7 points), and the turnover of total capital was 0.84 times (up 0.01 times).
- The added value per IC company was 3.31 billion yen (up 15.7%). The value added ratio was 33.2% (up 1.8 points) and labor productivity was 13.219 million yen/person (down 1.7%). The labor equipment ratio was 16.455 million yen/person (down 12.3%).

**Fig. 1-2-9 Assets per Company**

	Number of companies		Total assets (Total capital) (million yen)			Net assets (own capital) (million yen)			Capital adequacy ratio (%)			Turnover of total capital (times)		
	FY2009	FY2010	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Vs. previous fiscal year (points)	FY2009	FY2010	Vs. previous fiscal year (times)
Total	4,977	4,763	11,679.8	15,528.3	33.0	5,864.1	6,574.4	12.1	50.2	42.3	-7.9	0.86	0.82	-0.04
IC companies	4,475	4,114	10,926.7	11,883.1	8.8	5,841.1	6,275.1	7.4	53.5	52.8	-0.7	0.83	0.84	0.01
Telecommunications	120	108	213,567.4	220,405.5	3.2	110,335.4	120,004.2	8.8	51.7	54.4	2.7	0.68	0.68	0.00
Private broadcasting	418	288	8,994.0	9,308.1	3.5	6,389.8	6,551.8	2.5	71.0	70.4	-0.6	0.71	0.75	0.04
Cablecasting	214	158	4,060.8	5,380.7	32.5	1,995.6	2,319.0	16.2	49.1	43.1	-6.0	0.69	0.75	0.06
Software	1,970	1,907	3,224.1	4,546.7	41.0	1,570.5	2,022.5	28.8	48.7	44.5	-4.2	1.32	1.20	-0.12
Data processing & information services	783	803	6,676.6	7,214.5	8.1	3,440.0	3,567.3	3.7	51.5	49.4	-2.1	1.11	1.07	-0.04
Internet based services	273	234	6,180.0	5,792.1	-6.3	3,644.2	3,296.2	-9.5	59.0	56.9	-2.1	1.05	0.86	-0.19
Video picture information production & distribution	355	272	2,062.8	3,388.4	64.3	1,077.8	1,710.4	58.7	52.2	50.5	-1.7	0.96	0.85	-0.11
TV program production	275	204	804.1	1,501.4	86.7	437.1	778.4	78.1	54.4	51.8	-2.6	1.72	1.16	-0.56
Sound information production	25	35	1,573.2	3.0	-99.8	782.9	358.9	-54.2	49.8	31.1	-18.7	1.62	2.67	1.05
Radio program production	20	31	164.8	281.6	70.9	117.0	170.1	45.4	71.0	60.4	-10.6	1.46	2.02	0.56
Newspaper publishers	87	93	24,395.9	24,639.9	1.0	11,833.7	11,334.0	-4.2	48.5	46.0	-2.5	0.80	0.79	-0.01
Other publishers	148	145	15,963.0	16,422.0	2.9	10,326.4	10,516.9	1.8	64.7	64.0	-0.7	0.64	0.65	0.01
Commercial art & graphic design	48	36	905.9	590.1	-34.9	353.5	246.4	-30.3	39.0	41.8	2.8	1.92	1.98	0.06
Services incidental to video picture, sound information, character information production & distribution	34	35	2,175.6	2,203.1	1.3	1,219.4	1,245.5	2.1	56.0	56.5	0.5	0.83	0.76	-0.07

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

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.

**Fig. 1-2-10 Added Value per Company**

	Number of companies		Value added (million yen)			Value added ratio (%)			Labor productivity (10,000 yen/person)			Labor equipment ratio (10,000 yen/person)		
	FY2009	FY2010	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Vs. previous fiscal year (points)	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)
Total	4,977	4,763	2,979.3	3,448.4	15.7	29.6	27.1	-2.5	1,210.7	1,183.8	-2.2	1,629.2	2,065.0	26.7
IC companies	4,475	4,114	2,858.7	3,307.3	15.7	31.4	33.2	1.8	1,344.3	1,321.9	-1.7	1,876.3	1,645.5	-12.3
Telecommunications	120	108	34,887.5	40,418.9	15.9	24.1	26.9	2.8	3,748.4	3,753.0	0.1	11,232.6	10,128.0	-9.8
Private broadcasting	418	288	1,471.6	1,510.1	2.6	23.2	21.6	-1.6	1,977.0	1,872.1	-5.3	4,324.2	3,899.5	-9.8
Cablecasting	214	158	1,044.8	1,556.8	49.0	37.3	38.6	1.3	1,840.8	1,833.2	-0.4	3,629.8	3,253.7	-10.4
Software	1,970	1,907	1,852.9	2,257.0	21.8	43.4	41.2	-2.2	838.2	908.0	8.3	185.4	203.7	9.9
Data processing & information services	783	803	3,038.4	3,200.7	5.3	40.9	41.6	0.7	1,080.8	969.8	-10.3	459.5	393.4	-14.4
Internet based services	273	234	1,815.9	1,656.8	-8.8	27.9	33.4	5.5	1,203.1	1,120.3	-6.9	261.1	295.8	13.3
Video picture information production & distribution	355	272	551.7	805.2	45.9	27.9	28.0	0.1	915.6	1,034.3	13.0	1,000.1	1,179.8	18.0
TV program production	275	204	402.2	542.7	34.9	29.0	31.1	2.1	798.4	846.9	6.1	199.2	335.0	68.2
Sound information production	25	35	307.4	466.9	51.9	12.1	15.2	3.1	852.1	1,496.5	75.6	148.3	94.9	-36.0
Radio program production	20	31	81.9	154.9	89.1	34.1	27.3	-6.8	606.7	866.8	42.9	53.0	137.5	159.4
Newspaper publishers	87	93	6,737.7	6,606.7	-1.9	34.5	34.0	-0.5	1,505.8	1,460.9	-3.0	2,361.8	2,414.1	2.2
Other publishers	148	145	2,696.5	2,844.2	5.5	26.6	26.8	0.2	1,237.2	1,227.5	-0.8	1,309.3	1,198.0	-8.5
Commercial art & graphic design	48	36	568.1	283.9	-50.0	32.7	24.3	-8.4	825.5	661.1	-19.9	161.9	154.5	-4.6
Services incidental to video picture, sound information, character information production & distribution	34	35	781.5	736.5	-5.8	43.5	43.9	0.4	853.6	786.1	-7.9	1,131.1	1,019.8	-9.8

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

Value added ratio = Value added / Sales × 100. Productivity index to ascertain the value newly produced by companies.

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

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



## 5. Workers

- The total number of regular workers working for IC companies was 1,029,324, out of which 898,410 were full-time workers. The number of part-timers was 68,832 and the number of dispatched workers was 104,320.
- The number of regular workers per IC company was 250 (up 17.4%). The number of full-time workers was 218 (up 13.5%). The number of part-timers was 17 (up 41.7%) and the number of dispatched workers was 25 (up 4.2%).

**Fig. 1-2-11 Number of Workers**

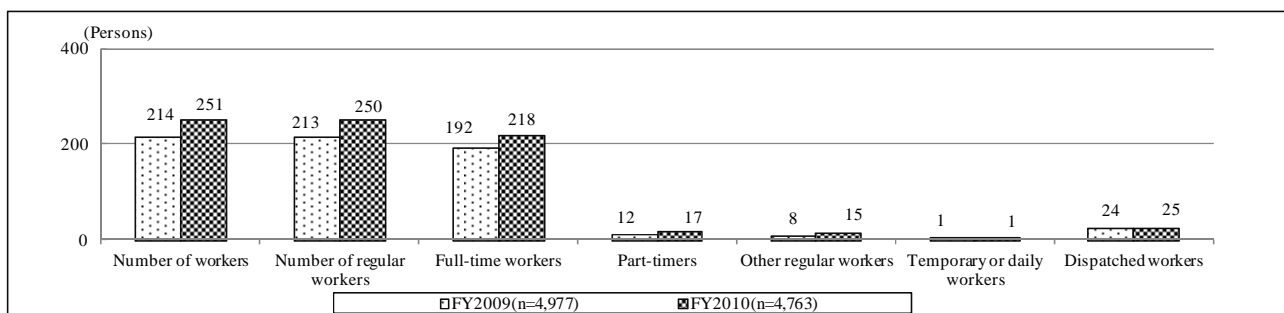
	Number of companies		Number of workers (persons)		Number of regular workers		Full-time workers/Regular staff members		Part-timers		Other regular workers		Temporary or daily workers		Dispatched workers (persons)	
	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010
Total	4,977	4,763	1,233,334	1,393,296	1,224,729	1,387,453	1,066,236	1,182,196	110,132	126,436	48,361	78,821	8,605	5,843	119,717	122,361
Year-on-year (%)	-	-4.3	-	13.0	-	13.3	-	10.9	-	14.8	-	63.0	-	-32.1	-	2.2
IC companies	4,475	4,114	957,212	1,033,635	951,647	1,029,324	860,407	898,410	55,068	68,832	36,172	62,082	5,565	4,311	108,992	104,320
Year-on-year (%)	-	-8.1	-	8.0	-	8.2	-	4.4	-	25.0	-	71.6	-	-22.5	-	-4.3
Telecommunications	120	108	111,699	116,411	111,688	116,314	94,305	76,206	4,835	8,207	12,548	31,901	11	97	25,047	17,104
Private broadcasting	418	288	31,778	23,763	31,113	23,232	27,601	17,721	2,054	1,371	1,458	4,140	665	531	6,666	4,308
Cablecasting	214	158	12,429	13,450	12,146	13,418	10,251	11,588	1,053	1,442	842	388	283	32	1,690	1,894
Software	1,970	1,907	435,806	474,630	435,480	474,001	418,179	455,458	11,986	7,425	5,315	11,118	326	629	29,161	30,507
Data processing & information services	783	803	220,863	265,702	220,117	265,007	184,460	216,244	25,999	40,543	9,658	8,220	746	695	36,695	40,180
Internet based services	273	234	41,314	34,676	41,206	34,606	36,107	30,331	2,608	2,644	2,491	1,631	108	70	4,012	4,094
Video picture information production & distribution	355	272	21,655	21,531	21,392	21,173	18,825	18,331	1,025	956	1,542	1,886	263	358	1,679	2,011
TV program production	275	204	14,022	13,347	13,855	13,071	12,379	11,119	620	471	856	1,481	167	276	1,012	1,024
Sound information production	25	35	1,009	1,101	902	1,092	757	894	136	165	9	33	107	9	62	176
Radio program production	20	31	377	563	270	554	188	422	73	111	9	21	107	9	43	119
Newspaper publishers	87	93	39,312	42,525	38,929	42,058	35,781	38,378	2,218	2,547	930	1,133	383	467	2,036	1,815
Other publishers	148	145	34,822	35,014	32,258	33,598	28,500	29,153	2,749	3,173	1,009	1,272	2,564	1,416	1,524	2,005
Commercial art & graphic design	48	36	3,367	1,546	3,303	1,546	2,824	1,275	190	143	289	128	64	-	74	58
Services incidental to video picture, sound information, character information production & distribution	34	35	3,158	3,286	3,113	3,279	2,817	2,831	215	216	81	232	45	7	346	168

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

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

	Number of workers (persons)		Number of regular workers		Full-time workers/Regular staff members		Part-timers		Other regular workers		Temporary or daily workers		Dispatched workers (persons)	
	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010
Total	248	293	246	291	214	248	22	27	10	17	2	1	24	26
Year-on-year (%)	-	18.1	-	18.3	-	15.9	-	22.7	-	70.0	-	-50.0	-	8.3
IC companies	214	251	213	250	192	218	12	17	8	15	1	1	24	25
Year-on-year (%)	-	17.3	-	17.4	-	13.5	-	41.7	-	87.5	-	0.0	-	4.2
Telecommunications	931	1,078	931	1,077	786	706	40	76	105	295	0	1	209	158
Private broadcasting	76	83	74	81	66	62	5	5	3	14	2	2	16	15
Cablecasting	58	85	57	85	48	73	5	9	4	2	1	0	8	12
Software	221	249	221	249	212	239	6	4	3	6	0	0	15	16
Data processing & information services	282	331	281	330	236	269	33	50	12	10	1	1	47	50
Internet based services	151	148	151	148	132	130	10	11	9	7	0	0	15	17
Video picture information production & distribution	61	79	60	78	53	67	3	4	4	7	1	1	5	7
TV program production	51	65	50	64	45	55	2	2	3	7	1	1	4	5
Sound information production	40	31	36	31	30	26	5	5	0	1	4	0	2	5
Radio program production	19	18	14	18	9	14	4	4	0	1	5	0	2	4
Newspaper publishers	452	457	447	452	411	413	25	27	11	12	4	5	23	20
Other publishers	235	241	218	232	193	201	19	22	7	9	17	10	10	14
Commercial art & graphic design	70	43	69	43	59	35	4	4	6	4	1	-	2	2
Services incidental to video picture, sound information, character information production & distribution	93	94	92	94	83	81	6	6	2	7	1	0	10	5

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



## 6. Subsidiaries and affiliated companies

- The ratio of IC companies that own subsidiaries<sup>(Note)</sup> in the information and communications industry was 30.3% (up 3.2 points).
- The number of subsidiaries was 5,219. Of which, the number of domestic subsidiaries was 4,020 and the number of overseas subsidiaries was 1,199 companies.
- The number of subsidiaries owned per IC company was 4.2 (up 0.2 companies). The number of domestic subsidiaries owned was 3.6 companies (down 0.1 companies) and the number of overseas subsidiaries owned was 3.5 companies (up 0.5 companies).
- When looking at overseas subsidiaries by region, Asia accounted for 687 companies (up 116 companies), or 57.4% in terms of the composition ratio (down 2.2 points). Europe accounted for 213 companies (up 48 companies), or 17.8% in terms of the composition ratio (up 0.6 points).

(Note) Subsidiaries include affiliated companies.

**Fig. 1-2-14 Subsidiaries Owned**

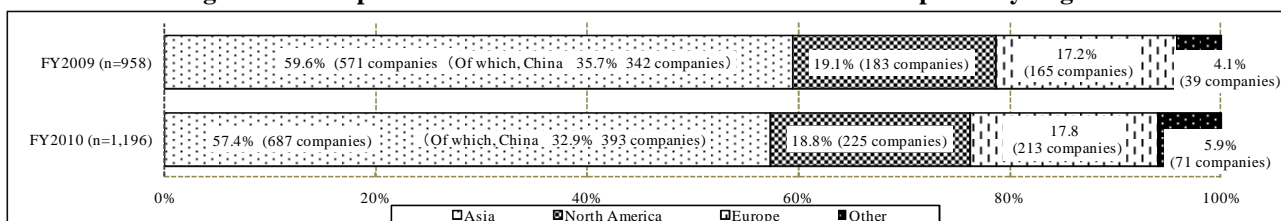
	Number of companies		Number of companies owning subsidiaries		Ratio of companies owning subsidiaries (%)			Number of subsidiaries		Number of subsidiaries owned per company		
	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	Vs. previous fiscal year (points)	FY2009	FY2010	FY2009	FY2010	Vs. previous fiscal year (companies)
Total	4,977	4,763	1,368	1,516	27.5	31.8	4.3	6,554	7,581	4.8	5.0	0.2
IC companies	4,475	4,114	1,211	1,248	27.1	30.3	3.2	4,902	5,219	4.0	4.2	0.2
Telecommunications	120	108	25	26	20.8	24.1	3.3	530	302	21.2	11.6	-9.6
Private broadcasting	418	288	91	103	21.8	35.8	14.0	367	340	4.0	3.3	-0.7
Cablecasting	214	158	10	21	4.7	13.3	8.6	52	78	5.2	3.7	-1.5
Software	1,970	1,907	586	583	29.7	30.6	0.9	1,522	1,796	2.6	3.1	0.5
Data processing & information services	783	803	198	201	25.3	25.0	-0.3	812	954	4.1	4.7	0.6
Internet based services	273	234	87	90	31.9	38.5	6.6	344	352	4.0	3.9	-0.1
Video picture information production & distribution	355	272	54	68	15.2	25.0	9.8	272	385	5.0	5.7	0.7
TV program production	275	204	29	47	10.5	23.0	12.5	63	176	2.2	3.7	1.5
Sound information production	25	35	2	3	8.0	8.6	0.6	6	5	3.0	1.7	-1.3
Radio program production	20	31	-	1	-	3.2	-	-	1	-	1.0	-
Newspaper publishers	87	93	60	59	69.0	63.4	-5.6	577	628	9.6	10.6	1.0
Other publishers	148	145	77	77	52.0	53.1	1.1	362	342	4.7	4.4	-0.3
Commercial art & graphic design	48	36	11	7	22.9	19.4	-3.5	23	11	2.1	1.6	-0.5
Services incidental to video picture, sound information, character information production & distribution	34	35	10	10	29.4	28.6	-0.8	35	26	3.5	2.6	-0.9

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

**Fig. 1-2-15 Ownership of Domestic and Overseas Subsidiaries**

	Domestic							Overseas						
	Number of companies owning domestic subsidiaries		Number of domestic subsidiaries		Number of domestic subsidiaries owned per company			Number of companies owning overseas subsidiaries		Number of overseas subsidiaries		Number of overseas subsidiaries owned per company		
	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	Vs. previous fiscal year (companies)	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	Vs. previous fiscal year (companies)
Total	1,208	1,356	5,056	5,610	4.2	4.1	-0.1	371	411	1,498	1,971	4.0	4.8	0.8
IC companies	1,064	1,105	3,942	4,020	3.7	3.6	-0.1	325	338	960	1,199	3.0	3.5	0.5
Telecommunications	24	23	315	139	13.1	6.0	-7.1	8	9	215	163	26.9	18.1	-8.8
Private broadcasting	91	102	360	333	4.0	3.3	-0.7	5	6	7	7	1.4	1.2	-0.2
Cablecasting	10	21	52	78	5.2	3.7	-1.5	-	-	-	-	-	-	-
Software	475	480	1,127	1,239	2.4	2.6	0.2	203	207	395	557	1.9	2.7	0.8
Data processing & information services	178	180	619	665	3.5	3.7	0.2	54	58	193	289	3.6	5.0	1.4
Internet based services	80	85	281	260	3.5	3.1	-0.4	26	27	63	92	2.4	3.4	1.0
Video picture information production & distribution	49	62	253	359	5.2	5.8	0.6	12	14	19	26	1.6	1.9	0.3
TV program production	27	44	59	161	2.2	3.7	1.5	3	8	4	15	1.3	1.9	0.6
Sound information production	2	3	6	5	3.0	1.7	-1.3	-	-	-	-	-	-	-
Radio program production	-	1	-	1	-	1.0	-	-	-	-	-	-	-	-
Newspaper publishers	60	59	560	614	9.3	10.4	1.1	4	4	17	14	4.3	3.5	-0.8
Other publishers	76	73	326	296	4.3	4.1	-0.2	9	11	36	46	4.0	4.2	0.2
Commercial art & graphic design	10	7	21	10	2.1	1.4	-0.7	1	1	2	1	2.0	1.0	-1.0
Services incidental to video picture, sound information, character information production & distribution	9	10	22	22	2.4	2.2	-0.2	3	1	13	4	4.3	4.0	-0.3

**Fig. 1-2-16 Composition Ratios of Overseas Subsidiaries in IC Companies by Region**



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

## Chapter 2 Telecommunications and Broadcasting Business

This Chapter shows the results of the Survey on Items for Each Business Type (Telecommunications and Broadcasting) based on valid responses from 727 companies (921 companies on a business basis).

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

- By capital size, business operators with capital of “Less than 50 million yen” were the largest in number, accounting for 34.2% of the total, followed by those with capital of “100 million yen to less than 300 million yen,” accounting for 16.3% of the total, and those with capital of “300 million yen to less than 500 million yen,” accounting for 15.7% of the total. By business type, business operators with capital of “Less than 50 million yen” accounted for the most in all businesses, followed by “300 million yen to less than 500 million yen” in telecommunications and cable television broadcasting, and “100 million yen to less than 300 million yen” in private broadcasting.
- By sales, business operators with sales of “100 million yen to less than 1 billion yen” and “1 billion yen to less than 10 billion yen” accounted for approximately 30% each (33.8% and 31.4%, respectively). By business type, business operators with sales of “100 million yen to less than 1 billion yen” accounted for the majority in telecommunications and cable television broadcasting (41.8% and 50.5%, respectively), and those with sales of “1 billion yen to less than 10 billion yen” accounted for the majority in private broadcasting (39.6%).
- By the number of workers, business operators with “One to 29 workers” accounted for the majority, or 62.9%, followed by those with “30 to 99 workers,” accounting for 21.9%. The same trend is also evident when looking by business type.

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

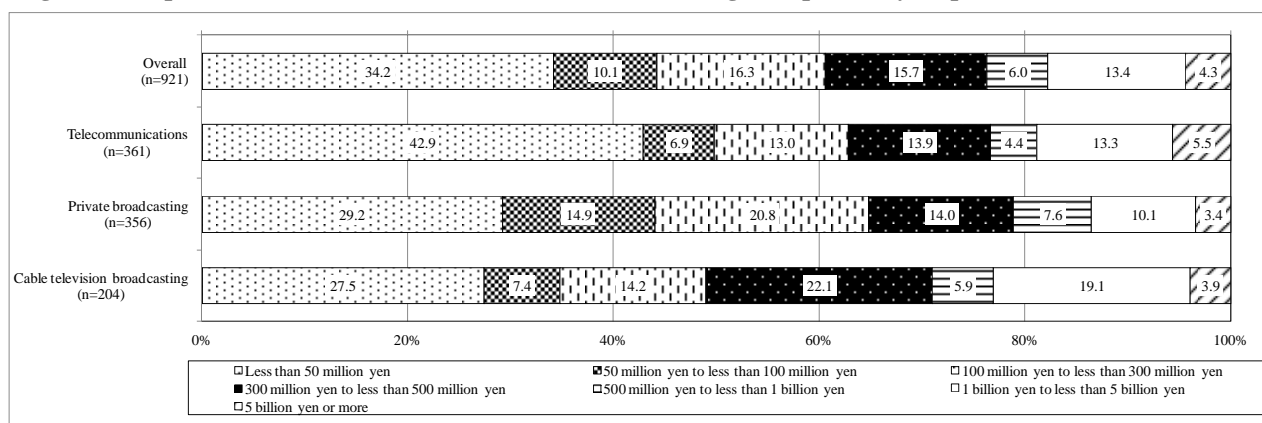
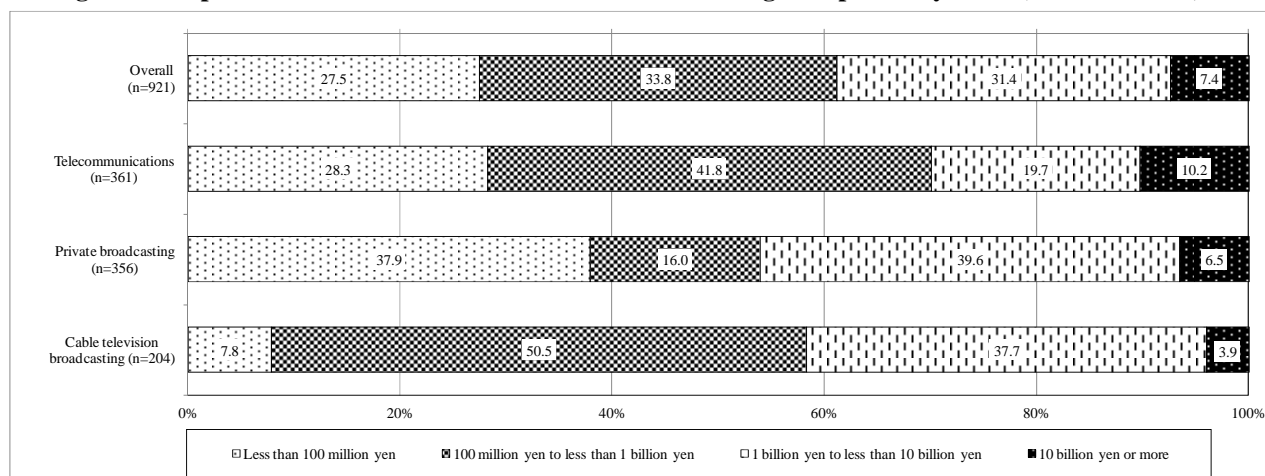
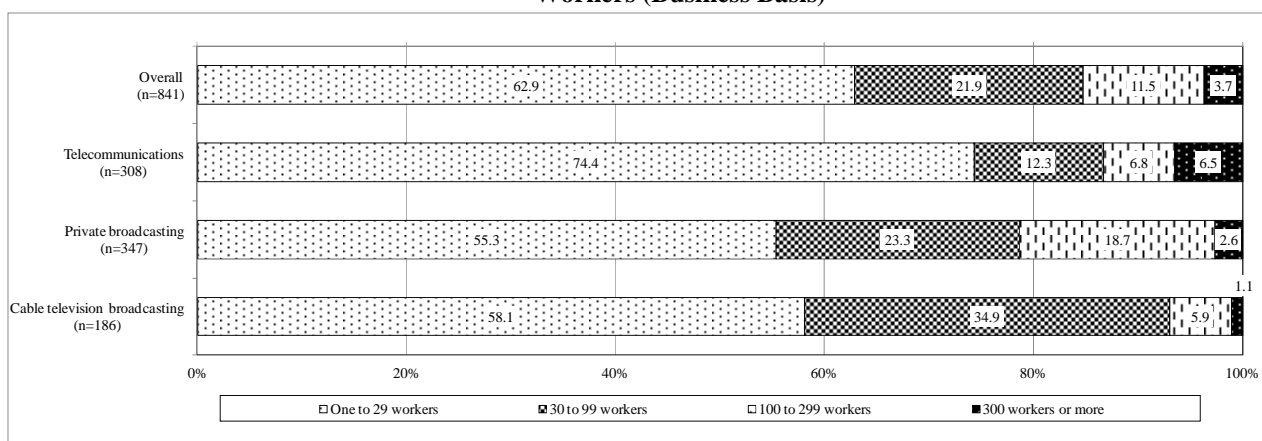


Fig. 2-2 Composition of Telecommunications and Broadcasting Companies by Sales (Business Basis)



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



## 2. Sales

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

- The total sales of the telecommunications and broadcasting business in FY2010 (on a business basis) were 13.4942 trillion yen.
- The total sales of companies that responded to the survey for the second consecutive year were 13.1031 trillion yen (down 0.9%).
- 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, %)

Classification	FY2008		FY2009		FY2010	
	Number of companies	Sales (Composition ratio)	Number of companies	Sales (Composition ratio)	Number of companies	Sales (Composition ratio)
Overall	1,170	179,849 (100.0%)	1,077	178,215 (100.0%)	922	134,942 (100.0%)
Telecommunications	457	144,055 (80.1%)	403	142,182 (79.8%)	361	107,423 (79.6%)
Broadcasting	713	35,793 (19.9%)	674	36,033 (20.2%)	561	27,519 (20.4%)
Private broadcasting	486	25,177 (14.0%)	436	25,406 (14.3%)	356	16,682 (12.4%)
Cable television broadcasting	226	3,972 (2.2%)	237	3,928 (2.2%)	204	3,997 (3.0%)
NHK	1	6,645 (3.7%)	1	6,699 (3.8%)	1	6,840 (5.1%)

\*Data for NHK are based on publicized material

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

(Unit: companies, 100 million yen, %)

Classification	FY2009		FY2010		Year-on-year (%)
	Number of companies	Sales (Composition ratio)	Number of companies	Sales (Composition ratio)	
Overall	777	132,246 (100.0%)	778	131,031 (100.0%)	-0.9
Telecommunications	267	104,789 (79.2%)	264	104,239 (79.6%)	-0.5
Broadcasting	510	27,457 (20.8%)	514	26,792 (20.4%)	-2.4
Private broadcasting	332	17,536 (13.3%)	334	16,553 (12.6%)	-5.6
Cable television broadcasting	177	3,222 (2.4%)	179	3,400 (2.6%)	5.5
NHK	1	6,699 (5.1%)	1	6,840 (5.2%)	2.1

\*Data for NHK are based on publicized material

**Fig. 2-6 Engagement in Side-Businesses**

(Unit: companies, 100 million yen)

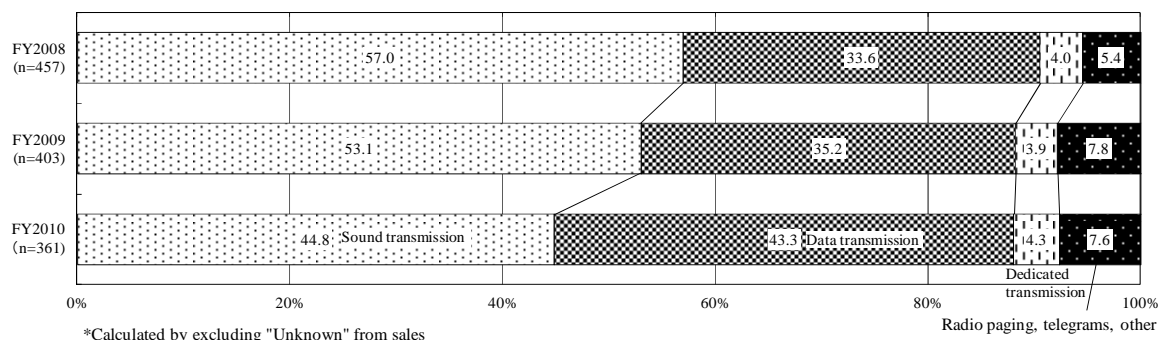
	Telecommunications			Private broadcasting			Cable television broadcasting	
	Number of companies	Sales		Number of companies	Sales		Number of companies	Sales
(Relevant business)			(Relevant business)			(Relevant business)		
Telecommunications	361	107,423	Private broadcasting	356	16,682	Cable television broadcasting	204	3,997
(Other businesses)			(Other businesses)			(Other businesses)		
Private broadcasting	10	537	Telecommunications	10	1,257	Telecommunications	176	3,272
Cable television broadcasting	176	3,738	Cable television broadcasting	12	105	Private broadcasting	12	112

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

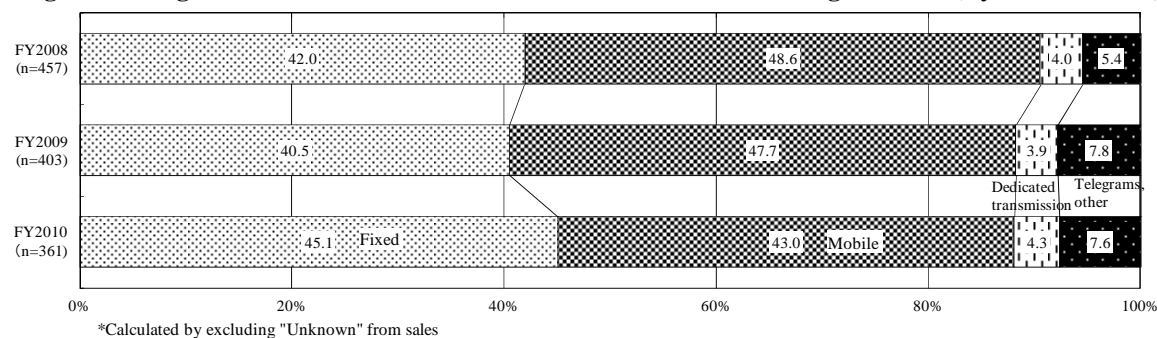
## (2) Breakdown of sales

- Looking at the breakdown of sales in the telecommunications business in FY2010 by sound or data transmission, sales from data transmission used for such purposes as an Internet connection continued to increase, accounting for 43.3% of the total (up 8.1 points). When looking at fixed/mobile communications, fixed communications accounted for 45.1% (up 4.6 points).
- With regard to the breakdown of sales for FY2010 in the private broadcasting business, 76.0% of the total sales were from terrestrial television broadcasting services (up 4.6 points) and 9.4% were from satellite broadcasting services (CS) (up 1.2 points).
- Of the total sales of the cable television broadcasting business in FY2010, 78.8% were generated from basic services (down 1.8 points), and 5.7% from pay services (up 0.8 points).

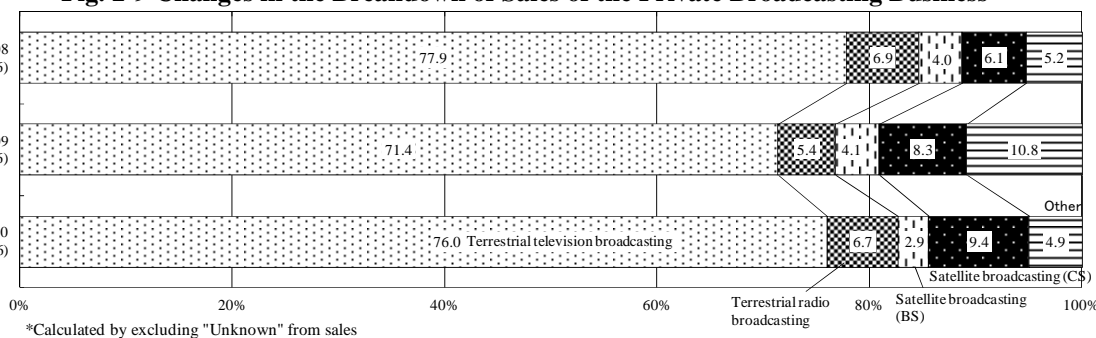
**Fig. 2-7 Changes in the Breakdown of Sales of the Telecommunications Business (By Sound or Data Transmission)**



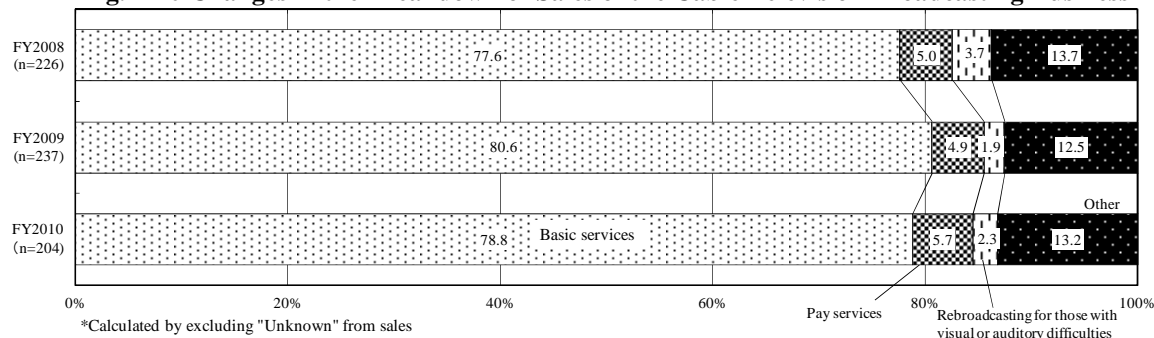
**Fig. 2-8 Changes in the Breakdown of Sales of the Private Broadcasting Business (By Fixed/Mobile)**



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



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



### 3. Capital investment

- The amount of acquisition and capital investment for the telecommunications and broadcasting business in FY2010 was 1.4108 trillion yen (down 48.1%).
- The amount of acquisition and capital investment in FY2010 for companies that responded to the survey for the second consecutive year was 1.3432 trillion yen (down 34.3%).

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

(Unit: companies, 100 million yen, %)

Classification	FY2008		FY2009		FY2010	
	Number of companies	Capital investment (composition ratio)	Number of companies	Capital investment (composition ratio)	Number of companies	Capital investment (composition ratio)
Overall	876	27,448 (100.0%)	653	27,179 (100.0%)	589	14,108 (100.0%)
Telecommunications	355	24,340 (88.7%)	228	23,694 (87.2%)	212	11,740 (83.2%)
Broadcasting	521	3,108 (11.3%)	425	3,484 (12.8%)	377	2,368 (16.8%)
Private broadcasting	317	1,643 (6.0%)	236	1,393 (5.1%)	196	675 (4.8%)
Cable television broadcasting	203	716 (2.6%)	188	1,308 (4.8%)	180	940 (6.7%)
NHK	1	749 (2.7%)	1	784 (2.9%)	1	753 (5.3%)

\*Data for NHK are based on publicized materials

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

(Unit: companies, 100 million yen, %)

Classification	Actual results from FY2009		Outlook for FY2010		Actual results from FY2010		Outlook for FY2011	
	Number of companies	Capital investment (composition ratio)	Number of companies	Capital investment (composition ratio)	Number of companies	Capital investment (composition ratio)	Number of companies	Capital investment (composition ratio)
Overall	485	20,444 (100.0%)	430	10,649 (100.0%)	501	13,432 (100.0%)	454	11,936 (100.0%)
Telecommunications	156	17,642 (86.3%)	144	9,591 (90.1%)	156	11,205 (83.4%)	140	10,803 (90.5%)
Broadcasting	329	2,802 (13.7%)	286	1,057 (9.9%)	345	2,226 (16.6%)	314	1,133 (9.5%)
Private broadcasting	187	847 (4.1%)	159	659 (6.2%)	188	669 (5.0%)	172	570 (4.8%)
Cable television broadcasting	141	1,172 (5.7%)	127	398 (3.7%)	156	805 (6.0%)	142	562 (4.7%)
NHK	1	784 (3.8%)			1	753 (5.6%)		

\*Data for NHK are based on publicized materials

### 4. Workers

- The number of workers engaged in the telecommunications and broadcasting business was 89,465, and the number of workers per company was 106.
- Looking at the number of workers per company that responded to the survey for the second consecutive year, the number of workers increased in the telecommunications business, but decreased in the private broadcasting and cable television broadcasting businesses.

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

(Unit: persons)

	Telecommunications/ Broadcasting		Telecommunications		Broadcasting		Private broadcasting		Cable television broadcasting	
	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010
Number of companies	977	841	336	308	641	533	418	347	223	186
Number of workers	125,934	89,465	81,604	57,956	44,330	31,509	34,846	23,892	9,484	7,617
Number of regular workers	122,137	88,784	81,290	57,736	40,847	31,048	31,406	23,457	9,441	7,591
Full-time worker/Regular staff member	101,596	76,327	66,991	50,482	34,605	25,845	27,523	19,623	7,082	6,222
Part-timers	6,257	5,431	3,476	3,317	2,781	2,114	1,886	1,494	895	620
Workers transferred to other	3,504	1,687	2,455	915	1,049	772	851	671	198	101
Temporary or daily workers	3,797	681	314	220	3,483	461	3,440	435	43	26
Dispatched workers	20,949	16,547	13,367	10,351	7,582	6,196	6,115	5,054	1,467	1,142
Number of workers per company	129	106	243	188	69	59	83	69	43	41

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

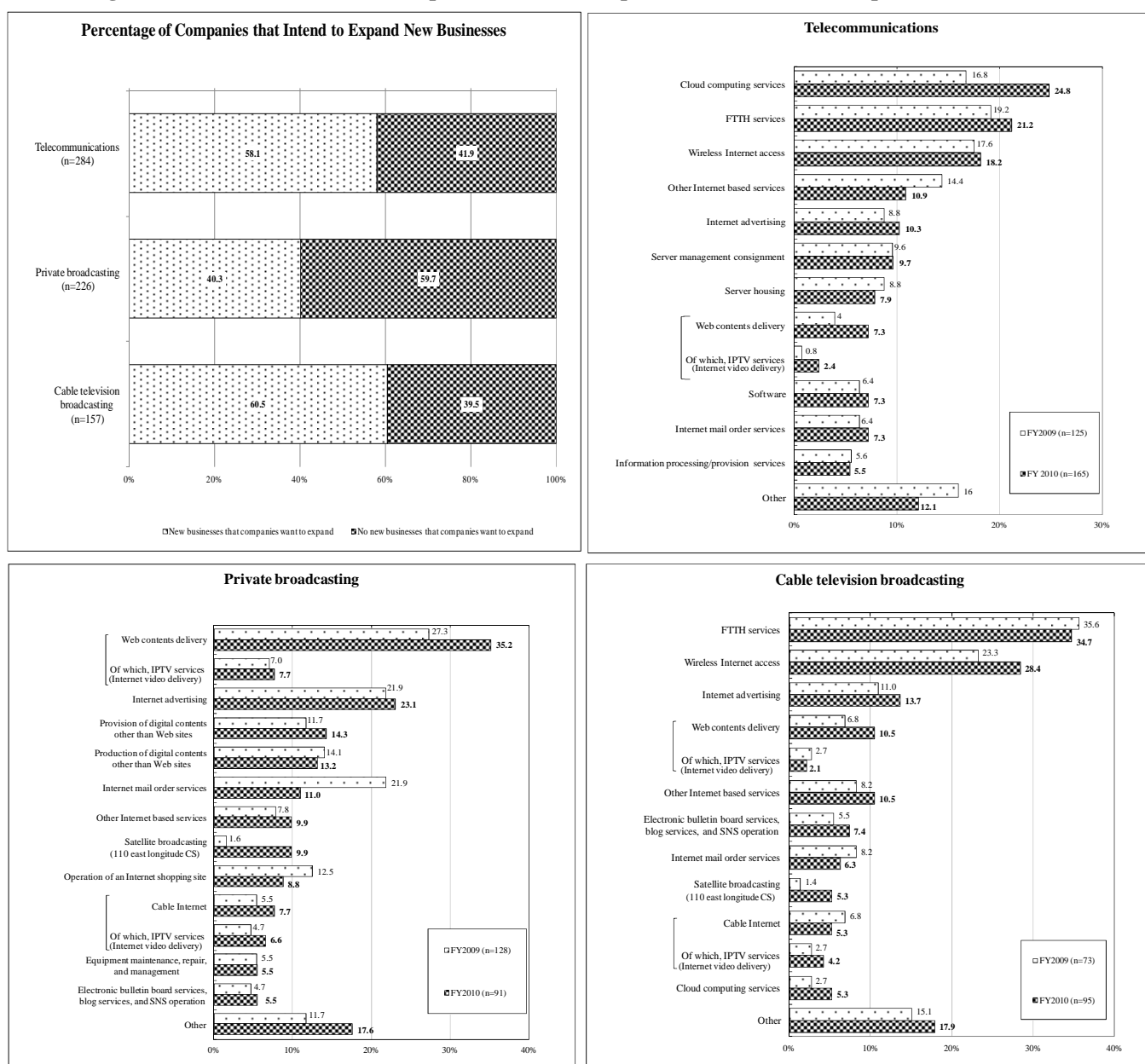
(Unit: persons)

	Telecommunications/ Broadcasting		Telecommunications		Broadcasting		Private broadcasting		Cable television broadcasting	
	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010
Number of companies	705	704	220	217	485	487	320	325	165	162
Number of workers	84,326	80,026	49,446	49,861	34,880	30,165	26,933	23,559	7,947	6,606
Number of regular workers	81,230	79,404	49,441	49,699	31,789	29,705	23,872	23,125	7,917	6,580
Temporary or daily workers	3,096	622	5	162	3,091	460	3,061	434	30	26
Dispatched workers	9,085	14,539	3,414	8,637	5,671	5,902	4,404	5,005	1,267	897
Number of workers per company	120	114	225	230	72	62	84	72	48	41

## 5. Future business operation

- With regard to companies that are thinking of expanding their business to new fields within one year, approximately 60% consist of those in the telecommunications and cable television broadcasting businesses.
- With regard to business fields that companies want to expand towards, the most common answers were “cloud computing services” (24.8%) in the telecommunications business, “Web contents delivery” (35.2%) in the private broadcasting business, and “FTTH services” (34.7%) in the cable television broadcasting business.

**Fig. 2-15 New Businesses that Companies Intend to Expand in the Future (multiple answers allowed)**



(Note) Represents the value obtained upon dividing with the number of companies that responded that they are intending to expand to new businesses within a year.

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

## Chapter 3 Broadcast Program Production Business

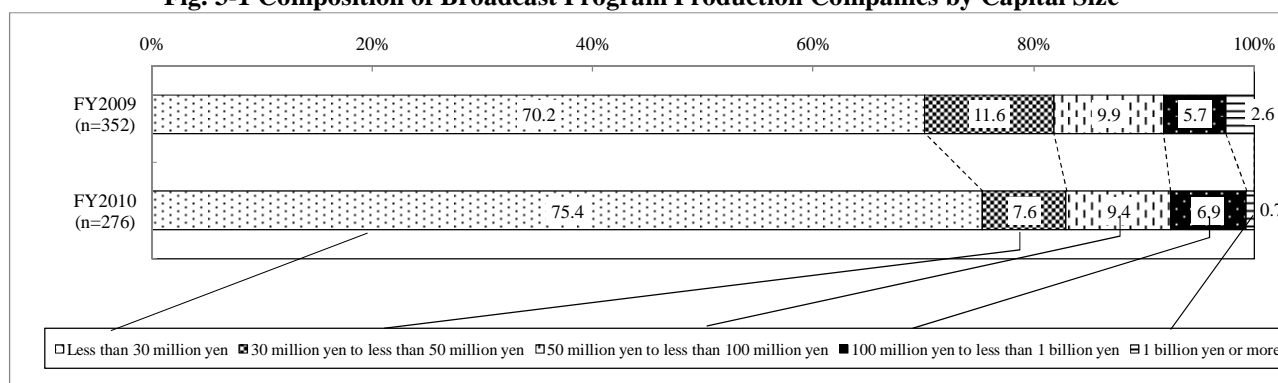
This Chapter shows the results of the Survey on Items for Each Business Type (Broadcast Program Production) based on valid responses from 276 companies.

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

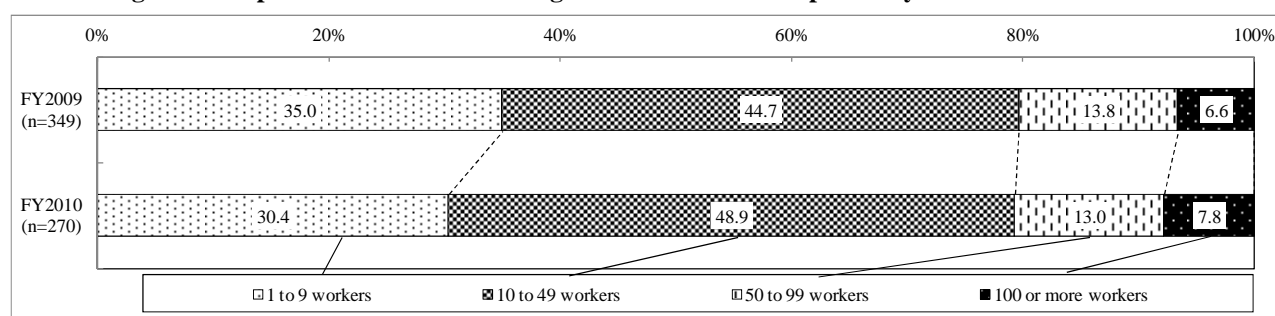
The number of companies engaged in the broadcast program production business was 276.

- Business operators with capital of less than 50 million yen accounted for 83.0% (up 1.2 points), and those with less than 100 workers accounted for 92.3% of the total (down 1.2 points). Most of the companies engaged in this business were small- and medium-sized.
- By sales, business operators with sales of “100 million yen to less than 300 million yen” were the largest in number, accounting for 31.9% of the total (up 1.8 points), followed by those with sales of “1 billion yen or more” (18.1% (down 0.4 points)) and those with sales of “Less than 50 million yen” (15.9% (down 2.9 points)).

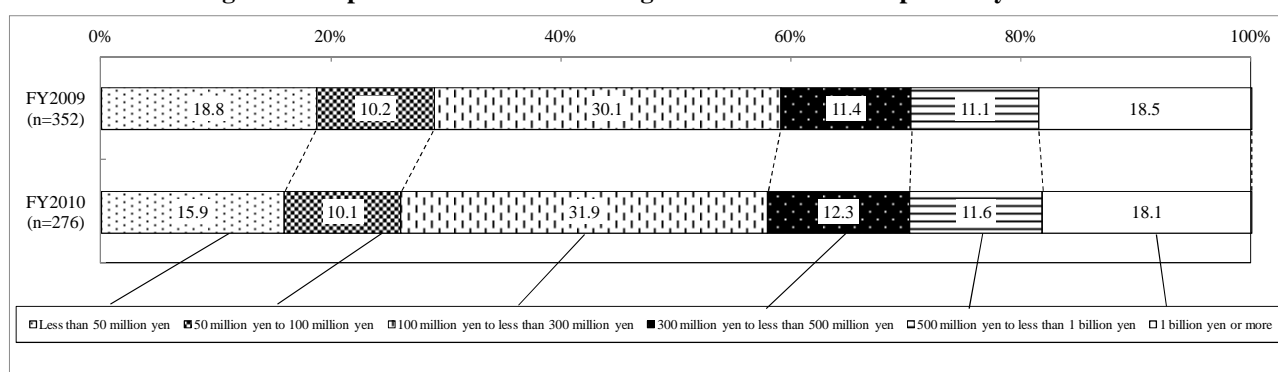
**Fig. 3-1 Composition of Broadcast Program Production Companies by Capital Size**



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



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

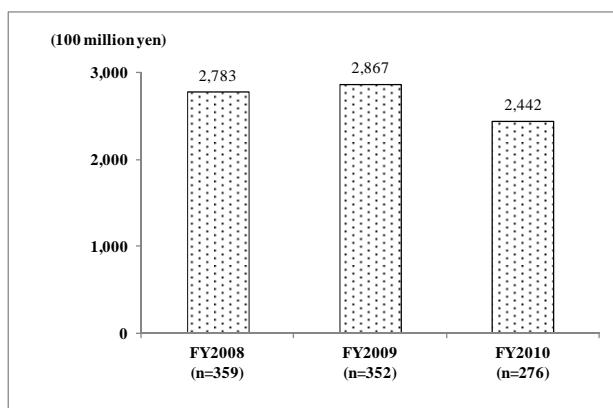




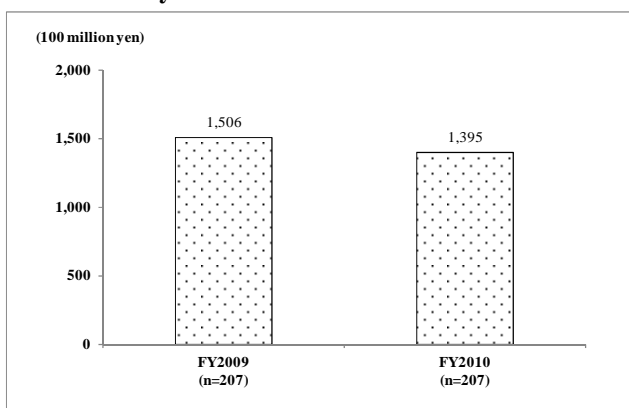
## 2. Sales

- The total sales of the broadcast program production business in FY2010 were 244.2 billion yen (down 14.8%).
- When looking at sales of companies that responded to the survey for the second consecutive year, the amount decreased from 150.6 billion yen in FY2009 to 139.5 billion yen in FY2010 (down 7.4%).

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



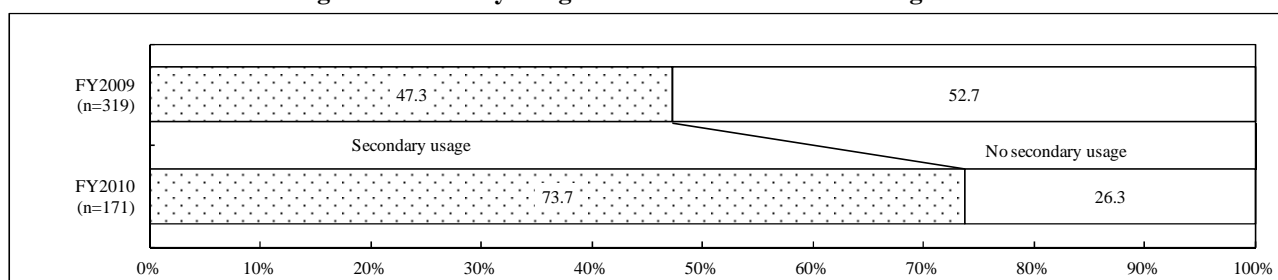
**Fig. 3-5 Changes in Sales of Companies that Responded to the Survey for the Second Consecutive Year**



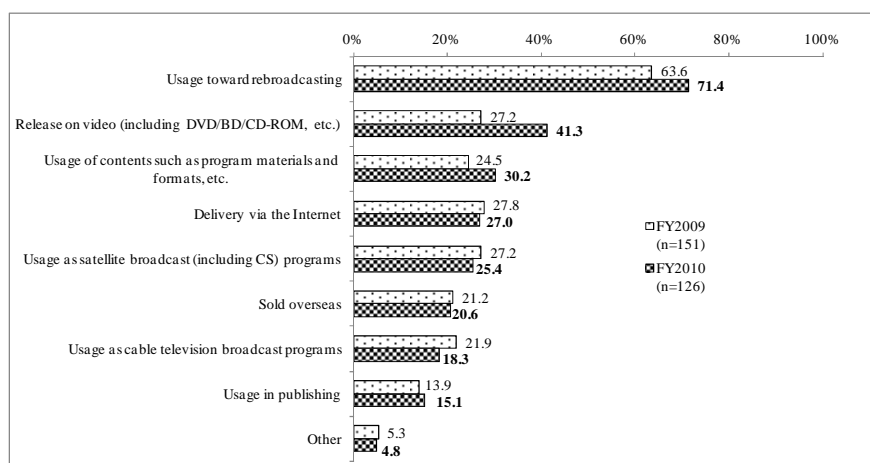
## 3. Secondary use of television broadcast programs

- With regard to broadcast programs for which secondary use is possible based on a company's own intent, the percentage of broadcast program producers that are actually carrying out secondary usage is 73.7% (up 26.4 points).
- Usage toward rebroadcasting was 71.4% (up 7.8 points), and release on video was 41.3% (up 14.1 points), and usage of contents was 30.2% (up 5.7 points).

**Fig. 3-6 Secondary Usage of Television Broadcast Programs**



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



#### 4. Capital investment

##### (1) Ratio of capital investment to sales

- The amount of acquisition and capital investment for the broadcast program production business in FY2010 was 3.82 billion yen (up 19.5%) and the ratio of capital investment to sales was 2.3% (up 0.3 points).

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

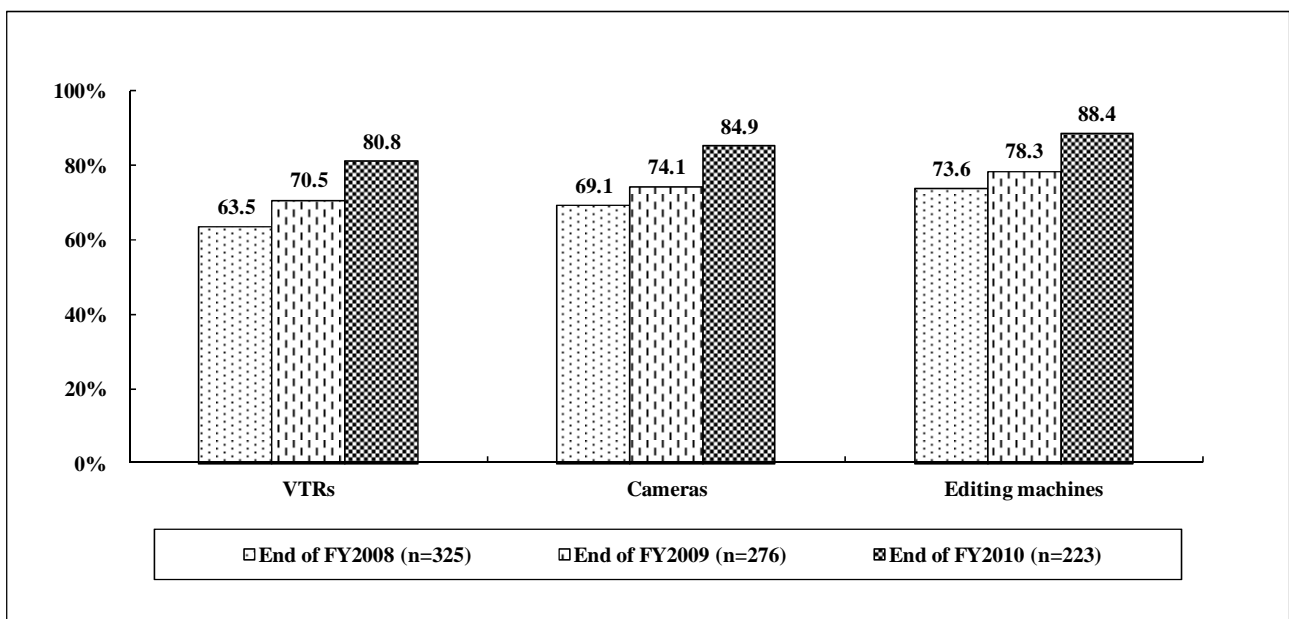
	Number of companies (companies)	Sales (million yen)	Sales per company (million yen)	Acquisitions and capital investments (million yen)	Acquisitions and capital investment per company (million yen)	Ratio of capital investment to sales (%)
Actual results from FY2009	142	162,454	1,144.0	3,196	22.5	2.0
Actual results from FY2010	118	167,060	1,415.8	3,819	32.4	2.3
Year-on-year (%)	-16.9	2.8	23.8	19.5	43.8	-

\* Only companies that provided a valid answer to both sales and capital investment were tabulated

##### (2) Digitalization of instruments

- Looking at the digitalization of instruments used for broadcast program production, 80.8% of VTRs (up 10.3 points), 84.9% of cameras (up 10.8 points), and 88.4% of editing machines (up 10.1 points) were digitalized.

**Fig. 3-9 Changes in Digitalization Ratios of Instruments Being Used**



## 5. Workers

- The number of workers engaged in the broadcast program production business was 9,859 (down 11.6%), out of which 9,779 were regular workers (down 10.5%).
- The number of workers per company was 37 (up 15.6%).

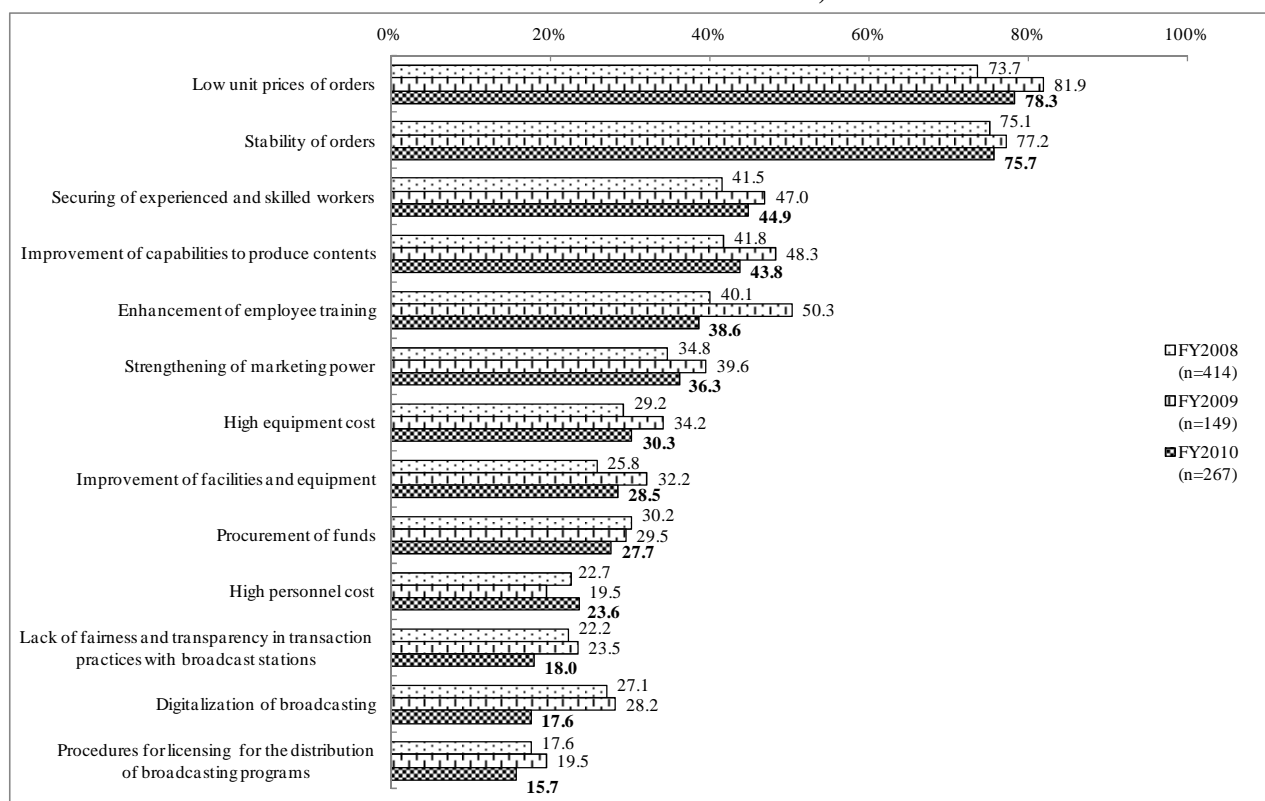
**Fig. 3-10 Number of Workers Engaged in the Broadcast Program Production Business by Capital Size**

	Overall	Less than 30 million yen		30 million yen to less than 50 million yen		50 million yen to less than 100 million yen		100 million yen to less than 1 billion yen		1 billion yen or more	
		Composition ratio (%)		Composition ratio (%)		Composition ratio (%)		Composition ratio (%)		Composition ratio (%)	
Number of companies	270	-	205	-	20	-	25	-	18	-	2
Number of workers	9,859	100.0	5,271	100.0	849	100.0	1,484	100.0	1,965	100.0	290
Regular workers	9,779	99.2	5,203	98.7	849	100.0	1,475	99.4	1,962	99.8	290
Full-time workers/Regular staff members	7,717	78.3	3,785	71.8	789	92.9	1,231	83.0	1,653	84.1	259
Part-timers	403	4.1	266	5.0	9	1.1	11	0.7	116	5.9	-
Workers transferred to other companies	265	2.7	201	3.8	14	1.6	23	1.5	-	-	0
Temporary or daily workers	80	0.8	68	1.3	0	-	9	0.6	-	-	-
Dispatched workers	670	-	168	-	100	-	256	-	146	-	0

## 6. Management problems

- As management problems in the broadcast program production business, as with the previous fiscal year, approximately 80% of business operators cited low unit prices of orders (78.3% (down 3.6 points)) and 75.7% cited the need to stabilize orders (down 1.5 points).

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



## Chapter 4 Internet Based Service Business

This Chapter shows the results of the Survey on Items for Each Business Type (Internet Based Services) based on valid responses from 482 companies.

### 1. Number of companies and sales

- Sales per company engaged in the Internet Based Service business was 2.22 billion yen in FY2010 (down 26.6%). Sales per company that responded to the survey for the second consecutive year was 3.7 billion yen (up 1.2%).
- When looking at the composition ratio of the number of companies by capital size, companies with capital of less than 100 million yen accounted for 42.3% of the total (up 8.8 points).
- Looking at companies that provided the percentage of their advertising revenue by service type, advertising revenue was the largest for “Web information search services,” accounting for 93.5% of the total revenue (down 5.6 points).

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

(Unit: companies, %, million yen)

	Number of companies			Sales			Sales per company		
	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)
Total	286	482	68.5	865,841	1,070,707	23.7	3,027.4	2,221.4	-26.6
Web information search services	32	58	81.3	226,967	209,254	-7.8	7,092.7	3,607.8	-49.1
Shopping site operation and auction site operation	49	72	46.9	144,348	141,389	-2.0	2,945.9	1,963.7	-33.3
Electronic bulletin board services, blog services, and SNS operation	13	24	84.6	51,076	20,200	-60.5	3,928.9	841.7	-78.6
Web contents delivery services	84	128	52.4	150,457	186,544	24.0	1,791.2	1,457.4	-18.6
Revenue from IPTV services	7	11	57.1	34,057	4,827	-85.8	4,865.3	438.8	-91.0
Cloud computing services	55	98	78.2	35,591	56,776	59.5	647.1	579.3	-10.5
Electronic authentication services	12	13	8.3	4,540	5,080	11.9	378.3	390.8	3.3
Information network security services	26	53	103.8	39,436	67,095	70.1	1,516.8	1,265.9	-16.5
Charting settlement agent services	9	12	33.3	11,822	32,152	172.0	1,313.6	2,679.3	104.0
Server management consignment	63	93	47.6	45,625	69,462	52.2	724.2	746.9	3.1
Other Internet based services	104	158	51.9	114,307	282,753	147.4	1,099.1	1,789.6	62.8
(Special tabulation) Companies that responded to the survey for the second consecutive year	180	180	-	658,585	666,356	1.2	3,658.8	3,702.0	1.2

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

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

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

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

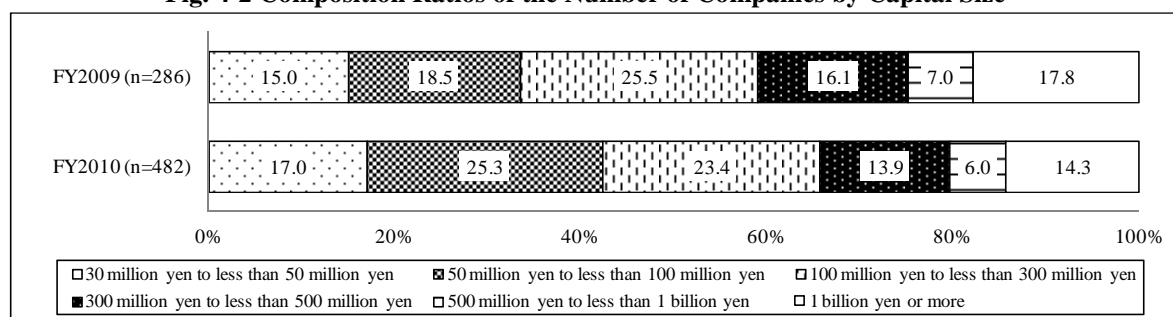


Fig. 4-3 Advertising Revenue and Percentage of Advertising Revenue by Service Type

(Unit: million yen, %)

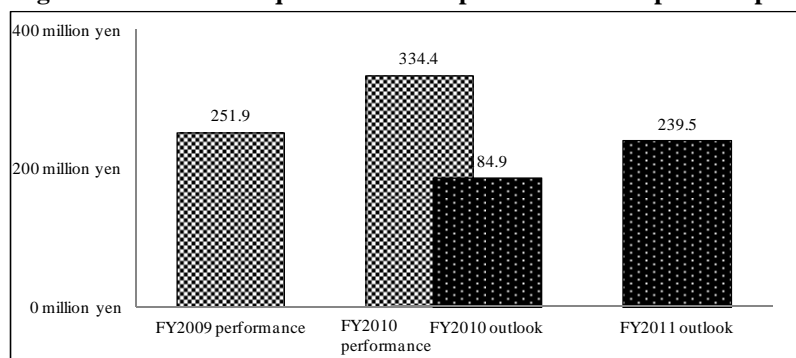
	Sales per company			Advertising revenue per company			Percentage of advertising revenue (%)		
	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Vs. previous fiscal year (points)
Web information search services	4,253.7	2,313.9	-45.6	4,217.4	2,163.5	-48.7	99.1	93.5	-5.6
Shopping site operation and auction site operation	10,709.1	14,946.4	39.6	4,323.4	6,060.6	40.2	40.4	40.5	0.1
Electronic bulletin board services, blog services, and SNS operation services	6,477.5	1,307.5	-79.8	5,877.2	949.2	-83.8	90.7	72.6	-18.1
Web contents delivery services	1,355.4	2,112.7	55.9	121.3	233.2	92.3	8.9	11.0	2.1

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

## 2. Capital investment

- The amount of acquisition and capital investment per company was 334 million yen in FY2010 (up 32.8%). The outlook for the next fiscal year (FY2011) is 240 million yen (up 29.5%).
- The ratio of capital investment to sales was 11.1% in FY2010 (up 4.2 points).

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



**Fig. 4-5 Ratios of Capital Investment to Sales**

	Number of companies (companies)	Sales per company (million yen)	Amount of acquisition and capital investment per company (million yen)	Ratio of capital investment to sales (%)	(Special tabulation) Companies that responded to the survey for the second consecutive year	
					Amount of acquisition and capital investment per company (million yen)	Ratio of capital investment to sales (%)
FY2009 performance	173	3,652.4	251.9	6.9	307.8	7.2
FY2010 performance	277	3,017.0	334.4	11.1	460.1	9.8
Year-on-year (%)	60.1	-17.4	32.8	4.2	49.5	2.6

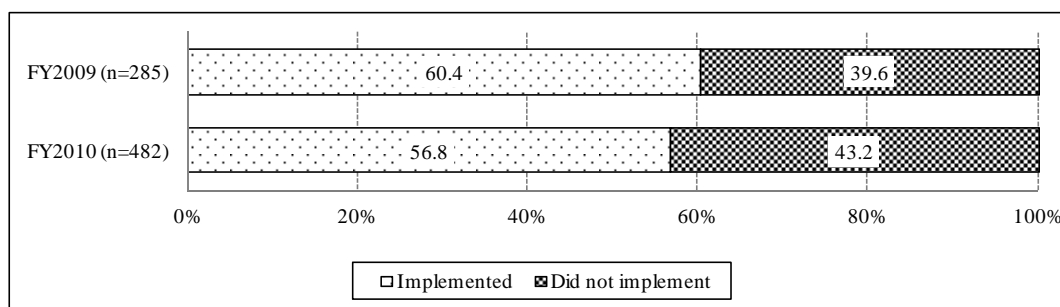
(Notes) Companies that provided answers to both "Sales" and "Amount of acquisition and capital investment" were subject to tabulation.

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

## 3. Outsourcing

- 56.8% of companies implemented outsourcing (down 3.6 points).
- The outsourcing cost per company was 311 million yen (up 19.1%).

**Fig 4-6 Status of Business Outsourcing**



**Fig 4-7 Status of Business Outsourcing by Capital Size**

(Unit: companies, million yen, %)

		Total	30 million yen to less than 50 million yen	50 million yen to less than 100 million yen	100 million yen to less than 300 million yen	300 million yen to less than 500 million yen	500 million yen to less than 1 billion yen	1 billion yen or more
Number of companies that responded	FY2009	171	21	29	48	28	12	33
	FY2010	274	42	62	73	39	15	43
	Year-on-year (%)	60.2	100.0	113.8	52.1	39.3	25.0	30.3
Outsourcing cost per company	FY2009	260.9	14.0	28.7	116.3	139.1	713.4	771.2
	FY2010	310.7	54.0	86.9	129.1	98.3	278.9	1,395.9
	Year-on-year (%)	19.1	285.7	202.8	11.0	-29.3	-60.9	81.0

#### 4. Workers

- The number of regular workers per company was 72 (down 8.9%), out of which 60 were full-time workers (down 11.8%).
- Looking at the rate of those newly hired and that of resignees for full-time workers were 8.3% (down 1.8 points) and 5.6% (down 1.8 points), respectively. The rate of contract workers newly hired and that of those with cancelled contracts were 25.9% (up 4.8 points) and 26.7% (up 13.3 points), respectively. The rate of contract cancellation for contract workers is high as compared to the rate of resignation of full-time workers.

**Fig. 4-8 Number of Workers by Capital Size**

(Unit: persons, %)

		Number of companies that provided valid answers		Number of workers		Number of regular workers		Full-time workers/regular staff members		Part-timers		Contract workers		Dispatched workers		Number of regular workers per company		Full-time workers/regular staff members	
		FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010	FY2009	FY2010
Total		286	482	22,726	34,912	22,707	34,676	19,509	29,036	772	1,285	1,110	1,660	2,638	4,728	79	72	68	60
	Year-on-year (%)	-	68.5	-	53.6	-	52.7	-	48.8	-	66.5	-	49.5	-	79.2	-	-8.9	-	-11.8
	30 million yen to less than 50 million yen	43	82	378	2,138	375	2,130	335	1,682	30	391	8	34	12	90	9	26	8	21
	50 million yen to less than 100 million yen	53	122	1,049	2,929	1,048	2,907	688	2,508	134	178	215	155	135	867	20	24	13	21
	100 million yen to less than 300 million	73	113	2,343	5,097	2,335	5,083	1,364	3,275	80	231	49	592	156	504	32	45	19	29
	300 million yen to less than 500 million	46	67	1,508	2,671	1,503	2,624	1,312	2,193	53	124	127	183	304	183	33	39	29	33
	500 million yen to less than 1 billion yen	20	29	2,664	2,887	2,662	2,885	2,444	2,520	147	182	66	98	174	492	133	99	122	87
	1 billion yen to less than 5 billion yen	37	52	7,121	10,113	7,121	10,079	6,188	9,207	313	118	444	389	895	1,547	192	194	167	177
	5 billion yen to less than 10 billion yen	4	6	3,833	4,008	3,833	4,001	3,683	3,770	1	7	33	36	175	182	958	667	921	628
	10 billion yen or more	10	11	3,830	5,069	3,830	4,967	3,495	3,881	14	54	168	173	787	863	383	452	350	353

**Fig. 4-9 New Hires and Resignees**

	Full-time workers/regular staff members (persons)				
	Percentage of those newly hired and resignees (%)				Vs. previous fiscal year (points)
	FY2009	FY2010	FY2009	FY2010	
Number of those newly hired	2,121	2,565	10.1	8.3	-1.8
New graduates	992	776	4.7	2.5	-2.2
Mid-career workers	1,129	1,789	5.4	5.8	0.4
Number of resignees	1,558	1,719	7.4	5.6	-1.8
Number of full-time workers or regular workers + Number of resignees	21,067	30,755	-	-	-

(Notes) Percentage of those newly hired = Number of those newly hired / (Number of full-time workers or regular workers + Number of resignees) × 100  
 Percentage of resignees = Number of resignees / (Number of full-time workers or regular workers + Number of resignees) × 100  
 Number of mid-career workers = Number of those newly hired - Number of new graduates who were newly hired

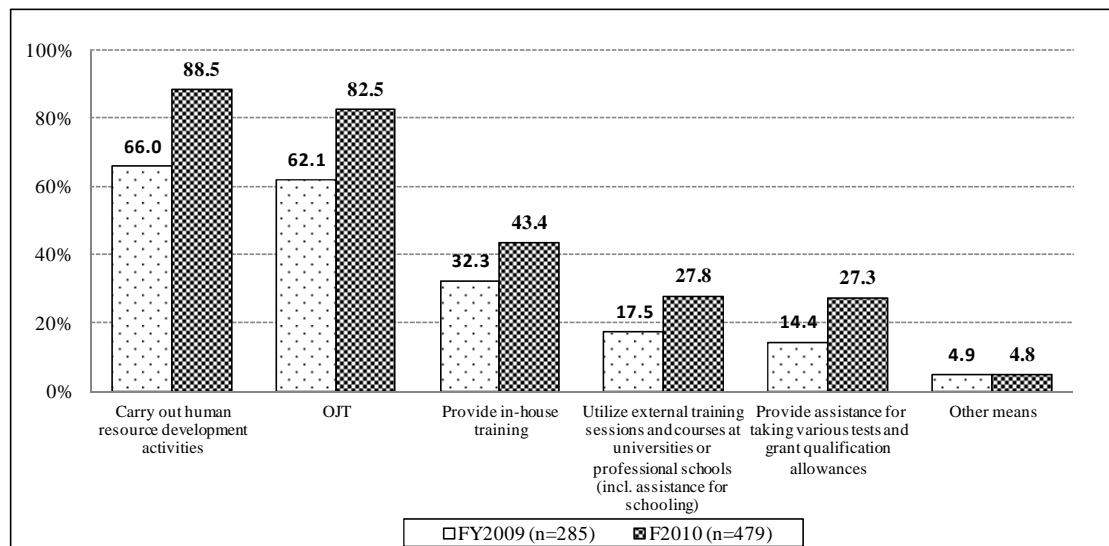
	Contract workers (persons)				
	Percentage of those newly hired and those with cancelled contracts (%)				Vs. previous fiscal year (points)
	FY2009	FY2010	FY2009	FY2010	
Number of those newly hired	271	587	21.1	25.9	4.8
New graduates	-	163	-	7.2	7.2
Mid-career workers	271	424	21.1	18.7	-2.4
Number of those with cancelled contracts	172	604	13.4	26.7	13.3
Number of contract workers + Number of those with cancelled contracts	1,282	2,264	-	-	-

(Notes) Percentage of those newly hired = Number of those newly hired / (Number of contract workers + Number of those with cancelled contracts) × 100  
 Percentage of those with cancelled contracts = Number of those with cancelled contracts / (Number of contract workers + Number of those with cancelled contracts) × 100  
 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 88.5% (up 22.5 points). Of them, 82.5% provided OJT (up 20.4 points) and 43.4% provided in-house training (up 11.1 points).

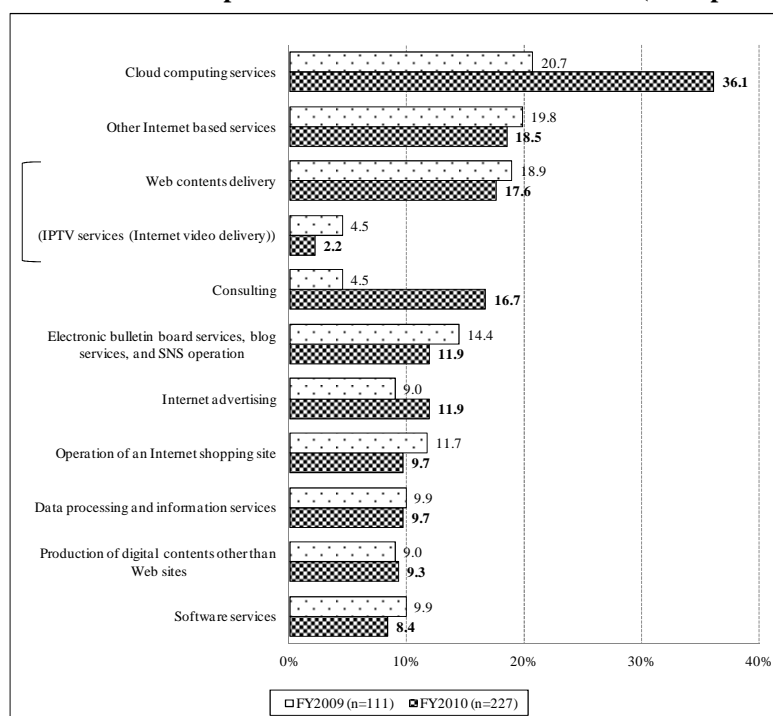
**Fig. 4-10 Percentage of Companies that Carried Out Human Resource Development Activities**



## 6. New business fields

- Regarding new business fields that companies intend to start in the future, the most common answers were “cloud computing services” (36.1%, up 15.4 points), followed by “Web contents delivery” (17.6%, down 1.3 points) and “consulting” (16.7%, up 12.2 points).

**Fig. 4-11 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.  
For “Cloud computing services” for FY2009, the values tabulated as “ASP-SaaS” are used.

## Chapter 5 Information Service Business

This Chapter shows the results of the Survey on Items for Each Business Type (Information Services) based on valid responses from 2,900 companies.

### 1. Number of companies and sales

- The sales per company engaged in the information services business was 3.54 billion yen in FY2010 (up 2.9%), with an increase in sales by game software companies (up 16.7%).
- Looking at the composition ratios of the number of companies by sector, custom software service companies accounted for the largest at 50.7% (down 0.3 points), followed by data processing service companies at 18.8% (up 0.9 points).
- Looking at the composition ratios of sales by sector, custom software service companies had the largest sales ratio at 44.3% (up 0.7 points), followed by data processing service companies at 27.3% (up 0.1 points).

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

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

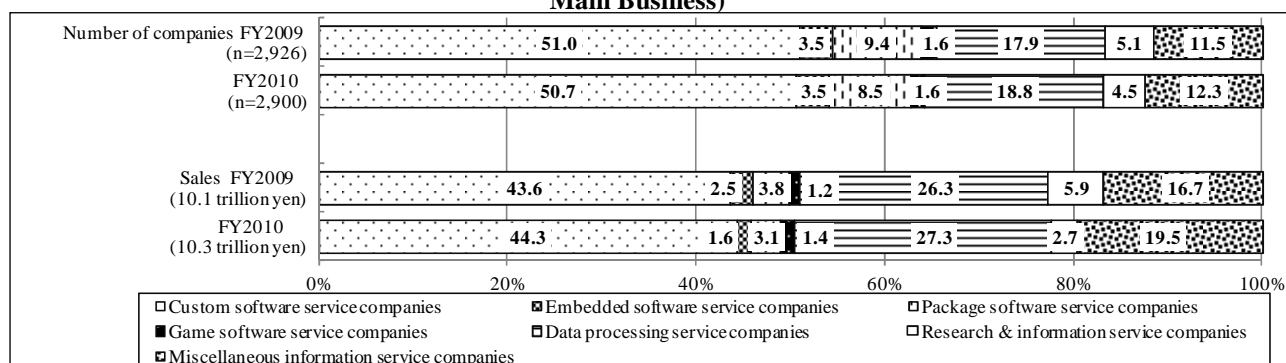
	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)
Total	2,926	2,900	-0.9	10,060,097	10,256,289	2.0	3,438.2	3,536.7	2.9
Custom software service companies	1,491	1,471	-1.3	4,382,166	4,545,808	3.7	2,939.1	3,090.3	5.1
Embedded software service companies	103	102	-1.0	255,318	164,820	-35.4	2,478.8	1,615.9	-34.8
Package software service companies	275	246	-10.5	377,794	322,987	-14.5	1,373.8	1,313.0	-4.4
Game software companies	48	47	-2.1	124,126	141,817	14.3	2,586.0	3,017.4	16.7
Data processing service companies	523	545	4.2	2,647,059	2,801,464	5.8	5,061.3	5,140.3	1.6
Research & information service companies	149	131	-12.1	596,582	275,738	-53.8	4,003.9	2,104.9	-47.4
Miscellaneous information service companies	337	358	6.2	1,677,052	2,003,655	19.5	4,976.4	5,596.8	12.5
(Special tabulation) Companies that responded to the survey for the second consecutive year	2,217	2,217	-	8,213,687	7,973,260	-2.9	3,704.9	3,596.4	-2.9

**(Reference: Based on Companies' Activities)**

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)
Total	2,926	2,900	-0.9	10,060,097	10,256,289	2.0	3,438.2	3,536.7	2.9
Custom software service	1,998	2,038	2.0	4,315,617	4,551,258	5.5	2,160.0	2,233.2	3.4
Embedded software service	280	264	-5.7	293,337	257,386	-12.3	1,047.6	974.9	-6.9
Package software service	668	614	-8.1	646,105	544,730	-15.7	967.2	887.2	-8.3
Game software	61	67	9.8	122,984	143,232	16.5	2,016.1	2,137.8	6.0
Data processing service	959	976	1.8	2,436,618	2,426,663	-0.4	2,540.8	2,486.3	-2.1
Research & information service	242	219	-9.5	479,627	261,421	-45.5	1,981.9	1,193.7	-39.8
Miscellaneous information service	811	837	3.2	1,765,809	2,071,599	17.3	2,177.3	2,475.0	13.7

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

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





## 2. Outsourcing in the development and production section

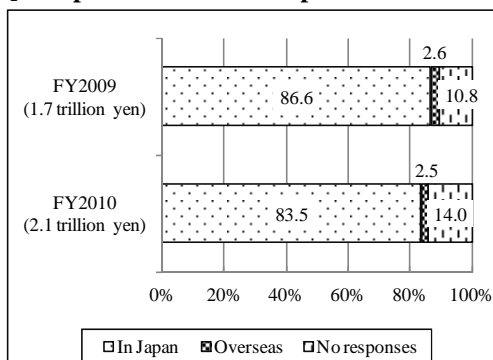
- The percentage of companies that outsourced work was 73.6% (down 0.6 points).
- The outsourcing cost per company was 1.2 billion yen (up 20.4%).
- 2.5% of the total was outsourced overseas (down 0.1 points). Looking at the composition ratios by region, Asia accounted for 91.5% (up 10.3%), out of which 65.1% was to China (up 0.1 points).
- Per company, 209.2 pieces of work were outsourced, on average (down 9.4%).
- Sales-based payment was adopted in 22.0% (up 3.2 points). The percentage for package software service companies was 30.3% (up 11.6 points).

**Fig. 5-3 Status of Business Outsourcing**

	Number of companies that answered whether or not they implemented outsourcing		Number of companies that implemented outsourcing			Percentage (%)			Number of companies that provided their outsourcing cost		Outsourcing cost (million yen)			Outsourcing cost per company (million yen)		
	FY2009	FY2010	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Difference from previous fiscal year (points)	FY2009	FY2010	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)
Total	2,342	2,406	1,738	1,772	2.0	74.2	73.6	-0.6	1,719	1,747	1,706,518	2,088,411	22.4	992.7	1,195.4	20.4
Custom software service companies	1,452	1,463	1,134	1,137	0.3	78.1	77.7	-0.4	1,123	1,130	1,107,700	1,298,866	17.3	986.4	1,149.4	16.5
Embedded software service companies	101	100	64	66	3.1	63.4	66.0	2.6	62	64	52,918	22,704	-57.1	853.5	354.8	-58.4
Package software service companies	270	239	156	137	-12.2	57.8	57.3	-0.5	155	133	28,515	29,451	3.3	184.0	221.4	20.3
Game software service companies	46	46	40	41	2.5	87.0	89.1	2.1	40	40	26,878	34,699	29.1	672.0	867.5	29.1
Data processing service companies	320	355	228	249	9.2	71.3	70.1	-1.2	225	242	234,713	500,485	113.2	1,043.2	2,068.1	98.2
Research & information service companies	30	38	23	24	4.3	76.7	63.2	-13.5	23	24	124,865	15,794	-87.4	5,428.9	658.1	-87.9
Miscellaneous information service companies	123	165	93	118	26.9	75.6	71.5	-4.1	91	114	130,929	186,412	42.4	1,438.8	1,635.2	13.7

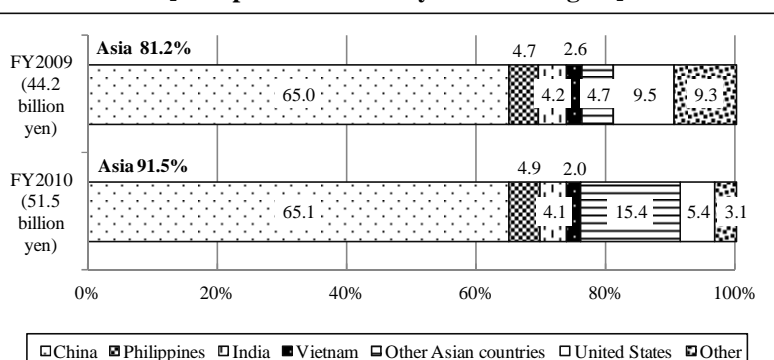
**Fig. 5-4 Outsourcing Overseas**

[Composition ratios in Japan and overseas]



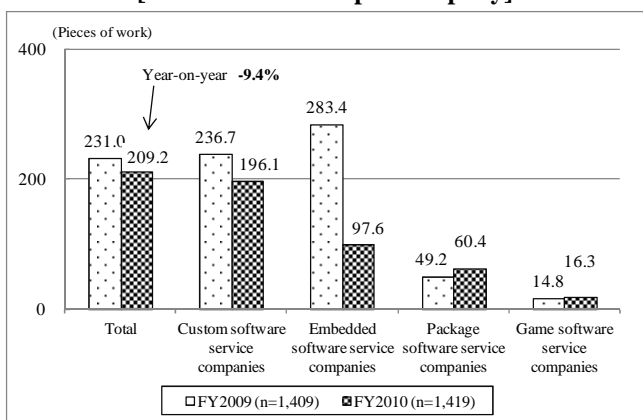
(Note) Includes companies that gave no responses regarding destinations.

[Composition ratios by overseas region]

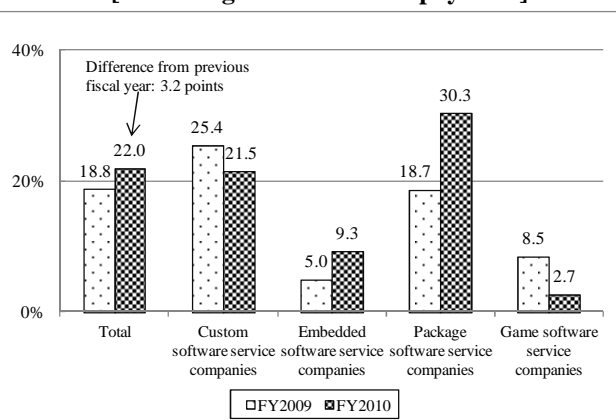


**Fig. 5-5 Outsourced Work and Percentage of Sales-Based Payment**

[Outsourced work per company]



[Percentage of sales-based payment]



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

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

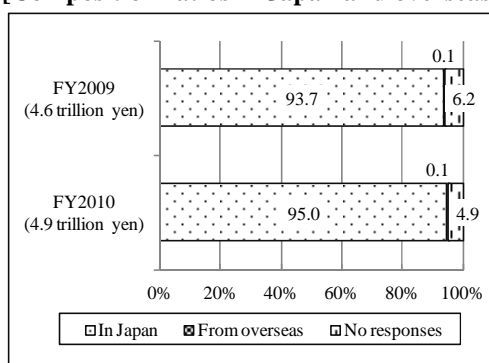
- Companies that accepted work commissioned by other companies accounted for 90.1% (up 1.1 points).
- The amount of accepted commissioned work per company was 2.28 billion yen (up 5.1%).
- Of the total, 0.1% was commissioned from overseas (0.0 point difference). By region, 46.7% was from the United States (up 21.6 points) and 38.6% was from Asia (down 12.2 points).
- Looking at the percentages of the number of companies according to primary contractors and subcontractors, the percentage of primary contractors accounted for 85.2%, and first subcontractors accounted for 58.2%. By capital size, the percentage of primary contractor increased as capital was larger, and the percentage of subcontractor decreased. The amount accepted as the primary contractor per company was 1.36 billion yen (up 0.8%), and the amount accepted as first subcontractor was 1.05 billion yen (down 3.5%).

**Fig. 5-6 Acceptance of Commissioned Work**

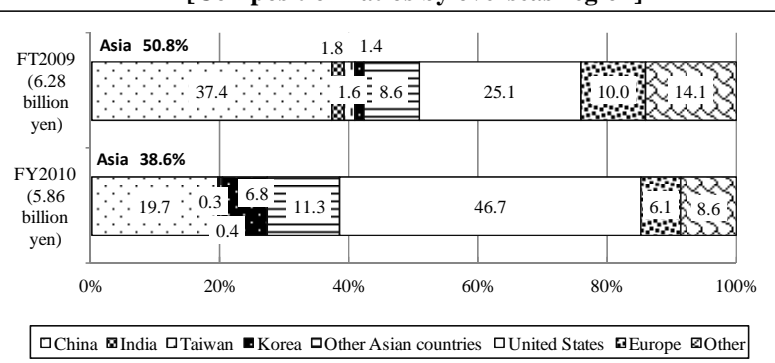
	Number of companies that answered whether or not they accepted commissioned work		Number of companies that accepted commissioned work			Percentage (%)			Number of companies that provided the amount of commissioned work they accepted		Amount of commissioned work they accepted (million yen)			Amount of acceptance per company (million yen)		
	FY2009	FY2010	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Difference from previous fiscal year (points)	FY2009	FY2010	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)
Total	2,391	2,408	2,129	2,170	1.9	89.0	90.1	1.1	2,110	2,133	4,577,210	4,865,181	6.3	2,169.3	2,280.9	5.1
Custom software service companies	1,484	1,465	1,484	1,465	-1.3	100.0	100.0	0.0	1,473	1,439	3,568,290	3,759,848	5.4	2,422.5	2,612.8	7.9
Embedded software service companies	102	99	100	94	-6	98.0	94.9	-3.1	97	92	141,675	120,968	-14.6	1,460.6	1,314.9	-10
Package software service companies	271	239	106	113	6.6	39.1	47.3	8.2	106	109	34,851	34,220	-1.8	328.8	313.9	-4.5
Game software service companies	46	46	32	35	9.4	69.6	76.1	6.5	32	34	24,149	27,141	12.4	754.7	798.3	5.8
Data processing service companies	324	355	267	288	7.9	82.4	81.1	-1.3	262	284	452,052	570,899	26.3	1,725.4	2,010.2	16.5
Resear & information service companies	32	38	24	27	12.5	75.0	71.1	-3.9	24	27	141,403	31,757	-77.5	5,891.8	1,176.2	-80
Miscellaneous information service companies	132	166	116	148	27.6	87.9	89.2	1.3	116	148	214,790	320,348	49.1	1,851.6	2,164.5	16.9

**Fig. 5-7 Acceptance of Commissioned Work from Overseas**

[Composition ratios in Japan and overseas]



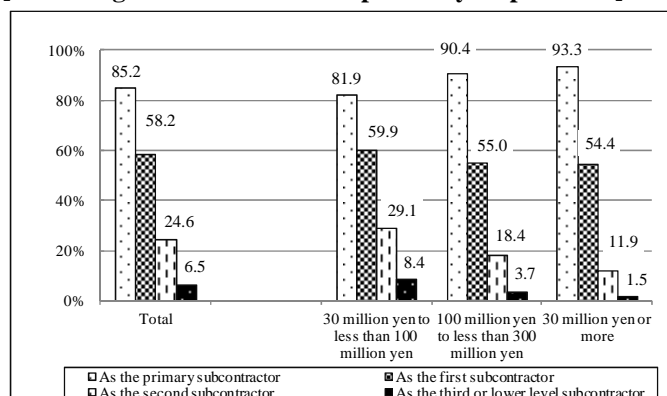
[Composition ratios by overseas region]



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

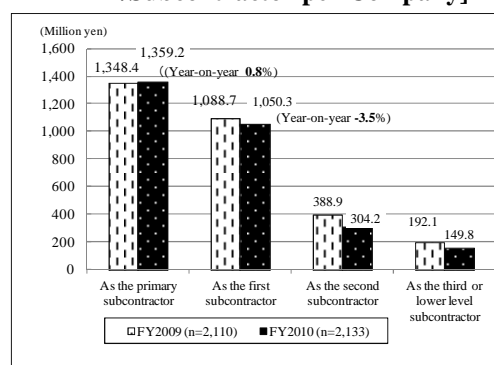
**Fig. 5-8 Primary Contractors and Subcontractors**

[Percentage of Number of Companies by Capital Size]



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

[Amount Accepted as Primary Contractor /Subcontractor per Company]



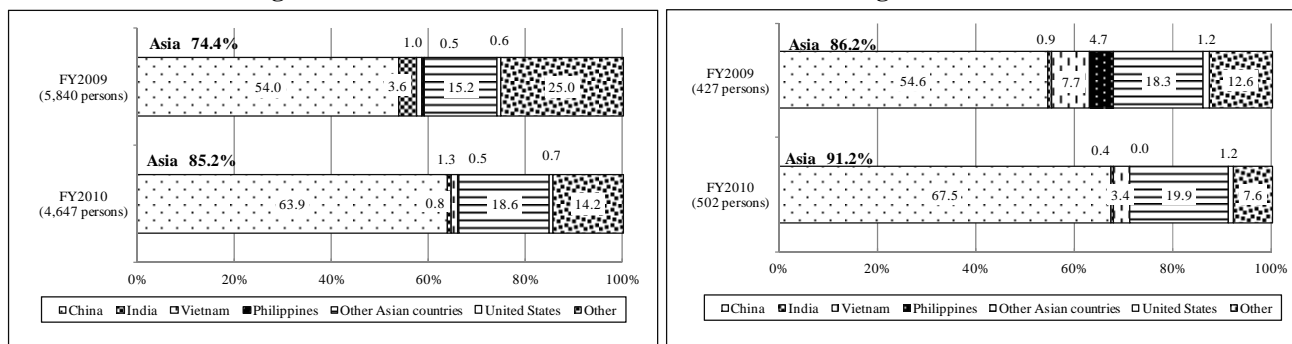
#### 4. Number of workers in the development and production section

- The number of regular workers per company was 179 (up 9.1%), with an increase in the game software business (up 20.8%). There were 160 full-time workers (up 6.0%).
- The number of foreign full-time workers was 4,647. Looking at composition ratios by region, Asia accounted for 85.2% (up 10.8 points), of which 63.9% were Chinese (up 9.9 points). The number of foreign contract workers was 502, of which 91.2% were Asian (up 5.0 points), among which 67.5% were Chinese (up 12.9 points).
- Looking at the rate of those newly hired and that of resignees, both rates were the same for full-time workers, at 4.1%. On the other hand, the rate of resignees was higher than the rate of those newly hired for contract workers, foreign full-time workers, and foreign contract workers.

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

		Number of companies that provided valid responses	Number of regular workers (persons)	Full-time workers/Regular staff members		Part-timers	Contract workers	Foreign workers	Dispatched workers (persons)	Number of regular workers per company (persons)	Year-on-year (%)	Full-time workers/Regular staff members	
Total	FY2009	2,400	392,947	362,698	5,840	8,181	10,165	427	38,772	164	-	151	-
	FY2010	2,397	428,638	383,545	4,647	7,195	24,294	502	38,722	179	9.1	160	6.0
Custom software service companies	FY2009	1,485	253,318	237,613	4,584	2,316	5,557	306	23,747	171	-	160	-
	FY2010	1,456	282,905	253,085	3,668	2,160	19,750	417	22,493	194	13.5	174	8.8
Embedded software service companies	FY2009	102	25,224	24,471	191	120	289	9	1,897	247	-	240	-
	FY2010	99	14,487	13,385	55	87	213	6	829	146	-40.9	135	-43.8
Package software service companies	FY2009	275	17,528	16,121	339	469	654	13	2,313	64	-	59	-
	FY2010	237	14,409	13,459	218	334	396	7	847	61	-4.7	57	-3.4
Game software service companies	FY2009	48	5,745	4,405	88	190	1,055	15	237	120	-	92	-
	FY2010	46	6,675	5,351	47	213	842	4	292	145	20.8	116	26.1
Data processing service companies	FY2009	326	60,332	52,126	284	4,768	2,229	80	6,966	185	-	160	-
	FY2010	354	65,863	57,319	376	3,994	1,932	51	9,628	186	0.5	162	1.3
Research & information service companies	FY2009	32	6,408	5,932	60	40	22	-	1,681	200	-	185	-
	FY2010	38	3,229	2,797	102	136	184	1	99	85	-57.5	74	-60
Miscellaneous information service companies	FY2009	132	24,392	22,030	294	278	359	4	1,931	185	-	167	-
	FY2010	167	41,070	38,149	181	271	977	16	4,534	246	33.0	228	36.5

**Fig. 5-10 Composition Ratios of Foreign Full-time Workers and Contract Workers by Region**  
[Foreign full-time workers] [Foreign contract workers]



**Fig. 5-11 New Hires and Resignees**

	Full-time workers (persons)		Percentage of those newly hired and resignees (%)		
	FY2009	FY2010	FY2009	FY2010	Vs. previous fiscal year (points)
Number of those newly hired	21,769	16,280	5.8	4.1	-1.7
New graduates	14,960	10,486	4.0	2.6	-1.4
Mid-career workers	6,809	5,794	1.8	1.4	-0.4
Number of resignees	15,867	16,217	4.2	4.1	-0.1
Number of full-time workers + Number of resignees	378,565	399,762	-	-	-
Foreigners	6,742	5,310	-	-	-
Number of new hires	828	489	12.3	9.2	-3.1
Number of resignees	902	663	13.4	12.5	-0.9

	Contract workers (persons)		Percentage of those newly hired and those with cancelled contracts (%)		
	FY2009	FY2010	FY2009	FY2010	Vs. previous fiscal year (points)
Number of those newly hired	2,006	2,238	17.0	8.0	-9.0
New graduates	119	95	1.0	0.3	-0.7
Mid-career workers	1,887	2,143	16.0	7.7	-8.3
Number of those with cancelled contracts	1,635	3,599	13.9	12.9	-1.0
Number of full-time workers + Number of those with cancelled contracts	11,800	27,893	-	-	-
Foreigners	574	591	-	-	-
Number of contract workers	99	85	17.2	14.4	-2.8
Number of those with cancelled contracts	147	89	25.6	15.1	-10.5

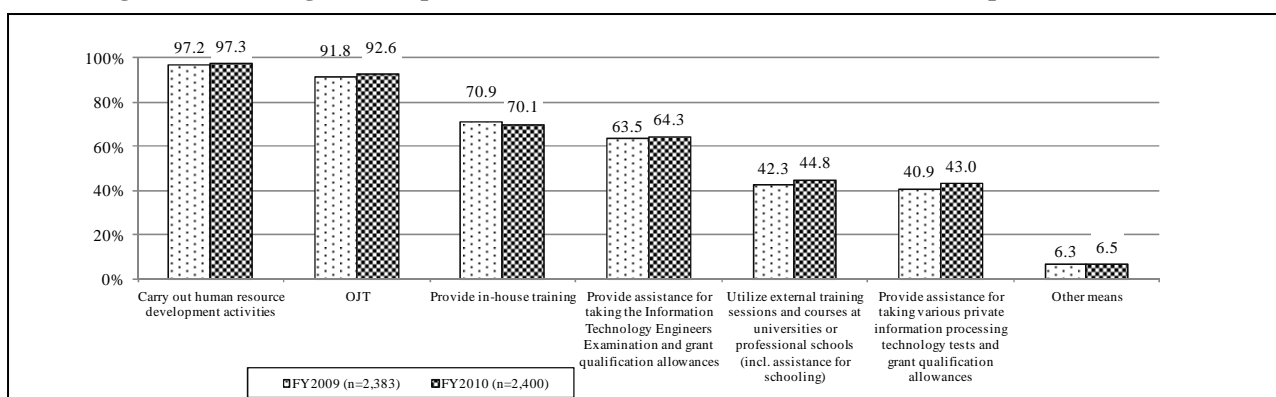
(Notes) Percentage of those newly hired = Number of those newly hired / (Number of full-time workers + Number of resignees) x 100  
 Percentage of resignees = Number of resignees / (Number of full-time workers + Number of resignees) x 100  
 Number of mid-career workers = Number of those newly hired - Number of new graduates who were newly hired  
 Percentage of foreigners newly hired/resignees is a percentage in relation to "Foreigners"

(Notes) Percentage of those newly hired = Number of those newly hired / (Number of contract workers + Number of those with cancelled contracts) x 100  
 Percentage of those with cancelled contracts = Number of those with cancelled contracts / (Number of contract workers + Number of those with cancelled contracts) x 100  
 Number of mid-career workers = Number of those newly hired - Number of new graduates who were newly hired  
 Percentage foreigners who are contract workers/those with cancelled contracts is a percentage in relation to "Foreigners"

## 5. Human resource development in the development and production section

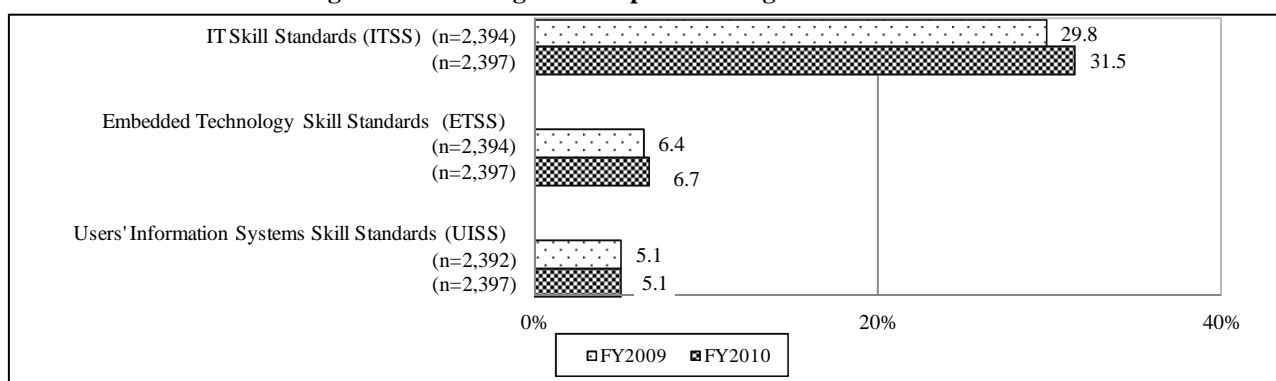
- The percentage of companies that carried out human resource development activities accounted for 97.3% (up 0.1 points). Of them, 92.6% provided OJT (up 0.8 points), and 64.3% provided assistance for taking the Information Technology Engineers Examination and granted qualification allowances (up 0.8 points).
- The percentages of companies using IT Skill Standards (ITSS), the Embedded Technology Skill Standards (ETSS), and the Users' Information Systems Skill Standards (UISS) were 31.5% (up 1.7 points), 6.7% (up 0.3 points), and 5.1% (0.0 point difference), respectively.
- Regarding university-related business operations, 13.8% carried out business-academia collaborations (down 0.8 points), 4.2% provided employee training by utilizing universities (down 0.8 points), and 25.3% offered cooperation for university education (0.0 point difference).

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

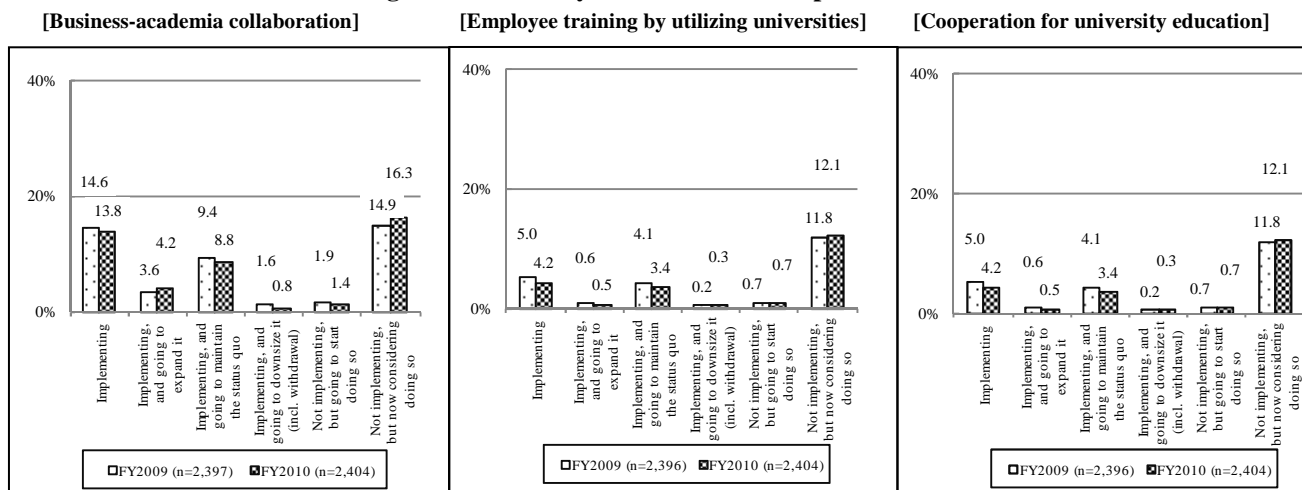


(Note) Multiple answers are allowed for activity contents

**Fig. 5-13 Percentage of Companies Using Skill Standards**



**Fig. 5-14 University-related Business Operations**



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

This Chapter shows the results of the Survey on Items for Each Business Type (Video Picture, Sound Information, Character Information Production and Distribution) based on valid responses from 445 companies.

### 1. Number of companies and sales

- The sales per company engaged in the video picture, sound information, character information production and distribution business in FY2010 was 4.68 billion yen (up 6.4%).
- Looking at the composition ratios for the number of companies by sector, other publishers accounted for the majority, or 31.5% (down 1.2 points), followed by the number of commercial art and graphic design companies, at 18.0% (down 1.4 points).
- Looking at the composition ratios for sales by sector, sales by other publishers accounted for the majority, at 33.9% (down 4.4 points), followed by sales by newspaper publishers, at 31.6% (up 10.9 points).

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

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

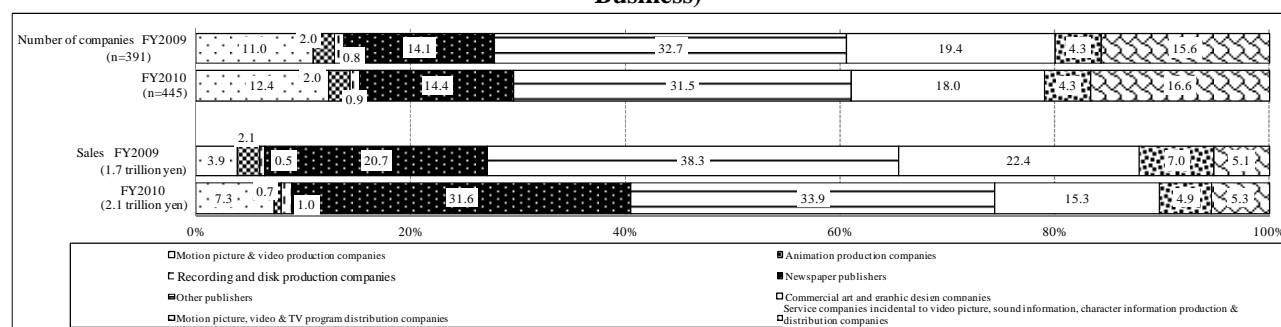
	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)
Total	391	445	13.8	1,720,150	2,083,565	21.1	4,399.4	4,682.2	6.4
Motion picture & video production companies	43	55	27.9	66,500	152,361	129.1	1,546.5	2,770.2	79.1
Animation production companies	8	9	12.5	36,826	14,786	-59.8	4,603.3	1,642.9	-64.3
Recording and disk production companies	3	4	33.3	7,904	20,400	158.1	2,634.7	5,100.0	93.6
Newspaper publishers	55	64	16.4	355,900	657,673	84.8	6,470.9	10,276.1	58.8
Other publishers	128	140	9.4	658,627	706,604	7.3	5,145.5	5,047.2	-1.9
Commercial art and graphic design companies	76	80	5.3	385,934	319,643	-17.2	5,078.1	3,995.5	-21.3
Motion picture, video & TV program distribution companies	17	19	11.8	120,921	102,484	-15.2	7,113.0	5,393.9	-24.2
Service companies incidental to video picture, sound information, character information production & distribution	61	74	21.3	87,538	109,614	25.2	1,435.0	1,481.3	3.2
(Special tabulation) Companies that responded to the survey for the second consecutive year	253	253	-	1,306,954	1,270,833	-2.8	5,165.8	5,023.1	-2.8

(Reference: Based on Companies' Activities)

	Number of companies			Sales (million yen)			Sales per company (million yen)		
	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)	FY2009	FY2010	Year-on-year (%)
Total	391	445	13.8	1,720,150	2,083,565	21.1	4,399.4	4,682.2	6.4
Motion picture & video production service	67	79	17.9	73,829	113,101	53.2	1,101.9	1,431.7	29.9
Animation production service	17	23	35.3	36,614	34,313	-6.3	2,153.8	1,491.9	-30.7
Recording and disk production service	7	9	28.6	4,150	31,794	666.1	592.9	3,532.7	495.8
Newspaper publishers	63	71	12.7	344,653	641,740	86.2	5,470.7	9,038.6	65.2
Other publishers	162	193	19.1	657,612	709,108	7.8	4,059.3	3,674.1	-9.5
Commercial art and graphic design service	103	121	17.5	401,740	326,428	-18.7	3,900.4	2,697.8	-30.8
Motion picture, video & TV program distribution service	23	32	39.1	106,902	107,320	0.4	4,647.9	3,353.8	-27.8
Service incidental to video picture, sound information, character information production & distribution	93	118	26.9	94,650	119,761	26.5	1,017.7	1,014.9	-0.3

(Note) Number of companies represents the number of companies that are engaged in relevant businesses; the total and sum of the breakdown do not match.

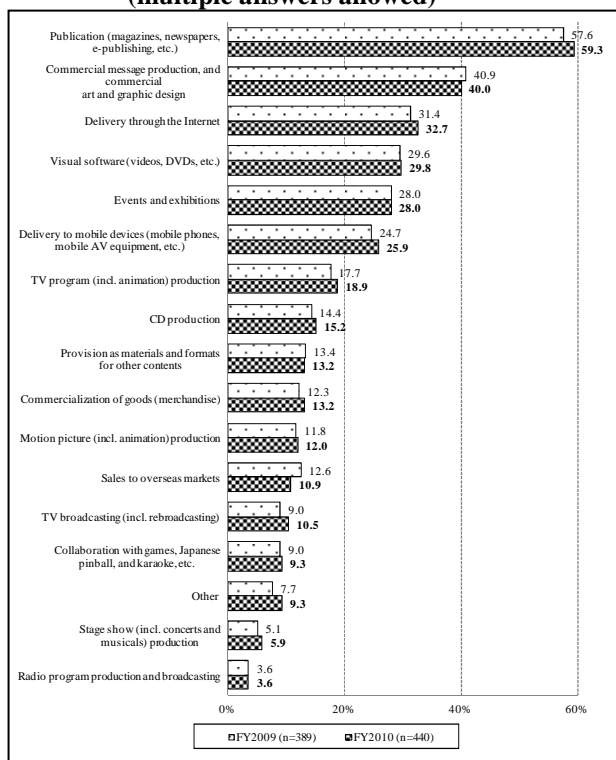
Fig. 6-2 Composition Ratios of the Number of Companies and Sales by Sector (Based on Companies' Main Business)



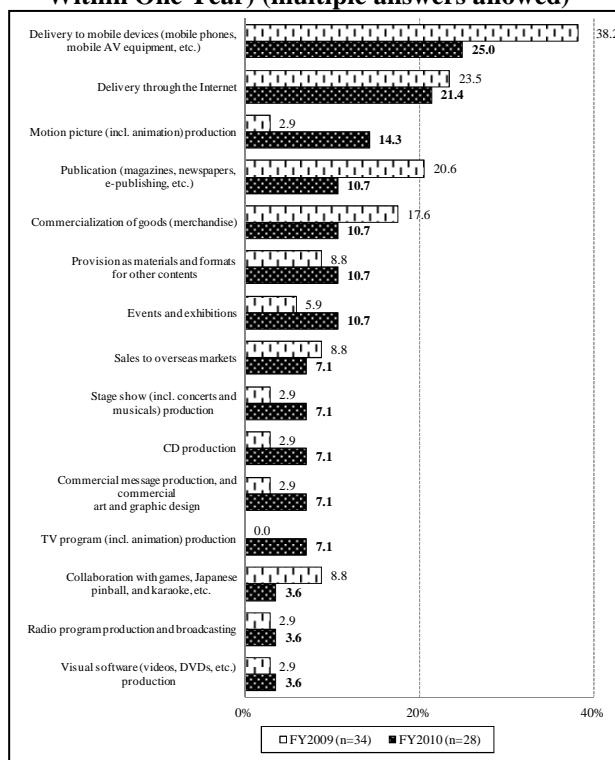
## 2. Business operation

- Regarding business operation, 59.3% of the companies (up 1.7% points) were already engaged in publication (magazines, newspapers, e-publishing, etc.), and 40.0% (down 0.9 points) in commercial message production, and commercial art and graphic design.
- Of the total number of companies, 25.0% (down 13.2 points) expressed their intention to start delivery to mobile devices (mobile phones, mobile AV equipment, etc.) within one year, and 21.4% (down 2.1 points) expressed their intention to start delivery through the Internet.

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



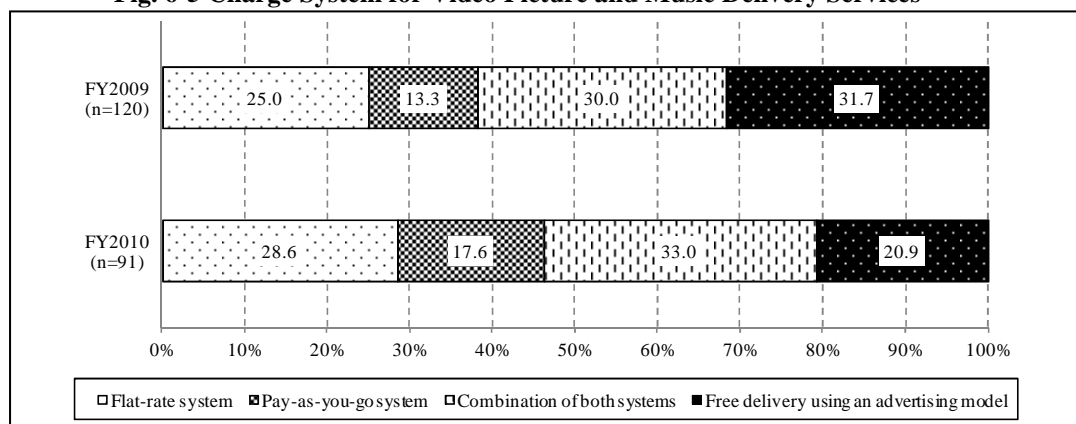
**Fig. 6-4 Business Operation (Plan to Start Within One Year)** (multiple answers allowed)



## 3. Charge system

- With regard to charge systems for the video picture and music delivery services, a combination of a flat-rate system and a pay-as-you-go system was the most common at 33.0% (up 3.0 points), followed by the flat-rate system at 28.6% (up 3.6 points).

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



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

- The number of content production per company was 173.2 pieces of contents (up 34.1%).
- Looking at the rights held concerning produced contents, 68.0% of the companies held the full right for the primary use, and 69.8% held the full right for the secondary use. In both cases, companies holding 100% of the rights were the largest in number.
- By sector, the percentage of newspaper publishers that held the full right for the primary use was higher than other sectors (100.0%), while the percentage of other publishers that held 0% (holding no rights) for the secondary use (29.1%) and the percentage of contents for which secondary use was performed (54.4%) were respectively higher than other sectors.

**Fig. 6-6 Number of Contents Produced by Sector**

(Unit: companies, pieces, %)

		Number of companies that provided valid responses	Number of contents produced	Number of contents produced per company
Total	FY2009	250	32,299	129.2
	FY2010	292	50,586	173.2
	Year-on-year (%)	16.8	56.6	34.1
Motion picture & video production companies	FY2009	41	4,331	105.6
	FY2010	54	11,852	219.5
Animation production companies	FY2009	8	627	78.4
	FY2010	9	109	12.1
Recording and disk production companies	FY2009	3	186	62.0
	FY2010	4	618	154.5
Newspaper publishers	FY2009	53	614	11.6
	FY2010	60	8,475	141.3
Other publishers	FY2009	121	25,777	213.0
	FY2010	132	25,228	191.1
Commercial art and graphic design companies	FY2009	12	418	34.8
	FY2010	14	298	21.3
Motion picture, video & TV program distribution companies	FY2009	5	270	54.0
	FY2010	6	215	35.8
Service companies incidental to video picture, sound information, character information production & distribution	FY2009	7	76	10.9
	FY2010	13	3,791	291.6

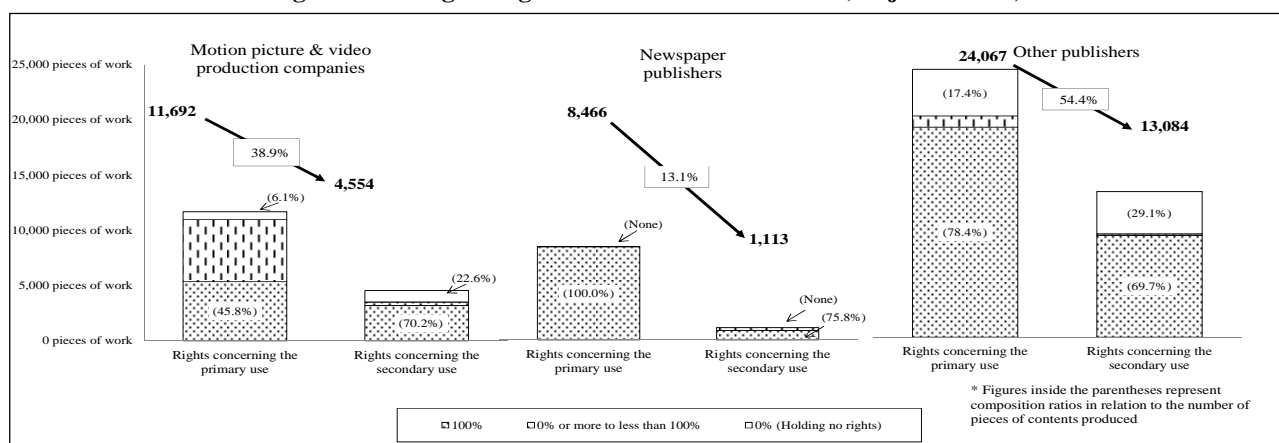
**Fig. 6-7 Holding of Rights for Produced Contents**

(Unit: pieces, %)

	Total	100%	50% or more to less than 100%	0% or more to less than 50%	0% (Holding no rights)
Rights concerning the primary use	48,880	33,238	1,647	6,110	7,885
Composition ratio (%)	100.0	68.0	3.4	12.5	16.1
Rights concerning the secondary use	19,677	13,735	295	552	5,095
Composition ratio (%)	100.0	69.8	1.5	2.8	25.9

(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.

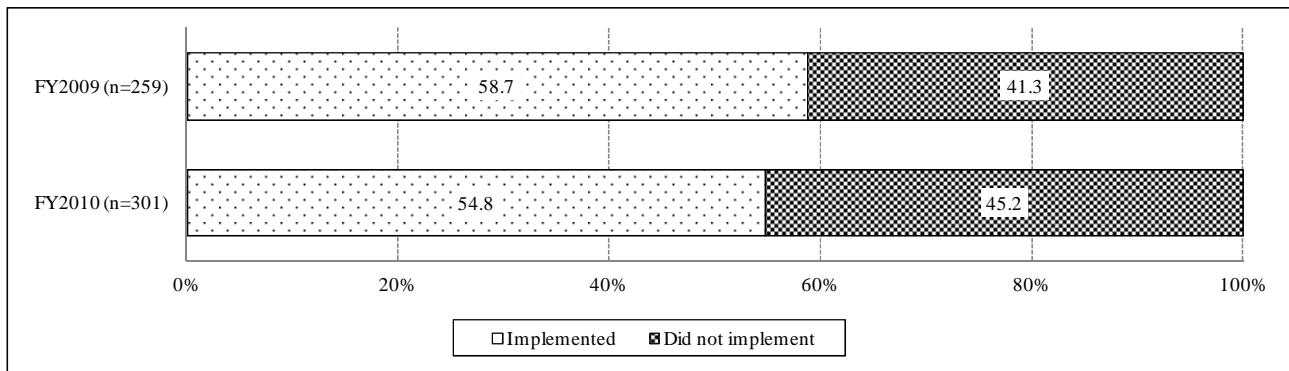
**Fig. 6-8 Holding of Rights for Produced Contents (Major Sectors)**



## 5. Outsourcing in the development and production section

- The percentage of companies that outsourced work was 54.8% (down 3.9 points).
- The outsourcing cost per company was 644 million yen (down 9.6%).
- The number of contents outsourced per company was 144.6 pieces (up 72.6%). Among the number of contents outsourced, sales-based payment was adopted in 13.6% (up 6.3 points).
- By major sector, motion picture & video production companies accounted for 36.1% (up 21.7 points).

**Fig. 6-9 Percentages of Companies Implementing Outsourcing**

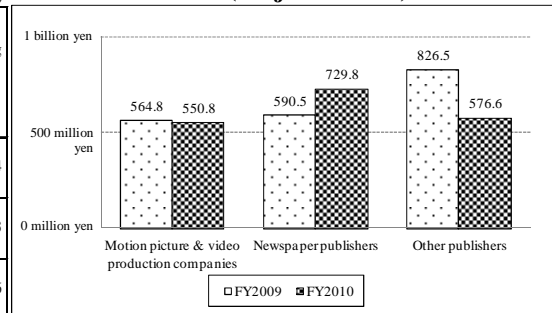


**Fig. 6-10 Outsourcing**

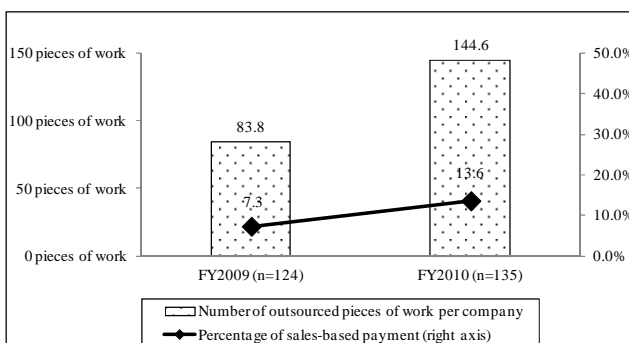
(Unit: companies, million yen, %)

	Number of companies that provided their outsourcing cost	Outsourcing cost	To long-term outsourcing partners	Percentage (%)	Completely outsourced work	Percentage (%)	Outsourcing cost per company
FY2009	137	97,600	37,489	38.4	24,810	25.4	712.4
FY2010	158	101,794	67,891	66.7	19,891	19.5	644.3
Year-on-year (%)	15.3	4.3	81.1	—	-19.8	—	-9.6

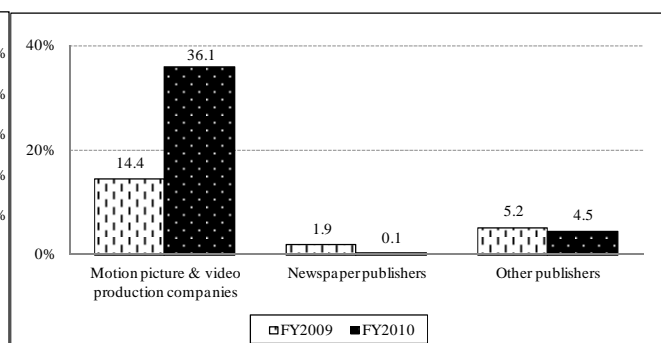
**Fig. 6-11 Amount Outsourced Per Company (Major Sectors)**



**Fig. 6-12 Number of Contents Outsourced and Percentage of Sales-Based Payment per Company**



**Fig. 6-13 Percentage of Sales-based Payment (Major Sectors)**



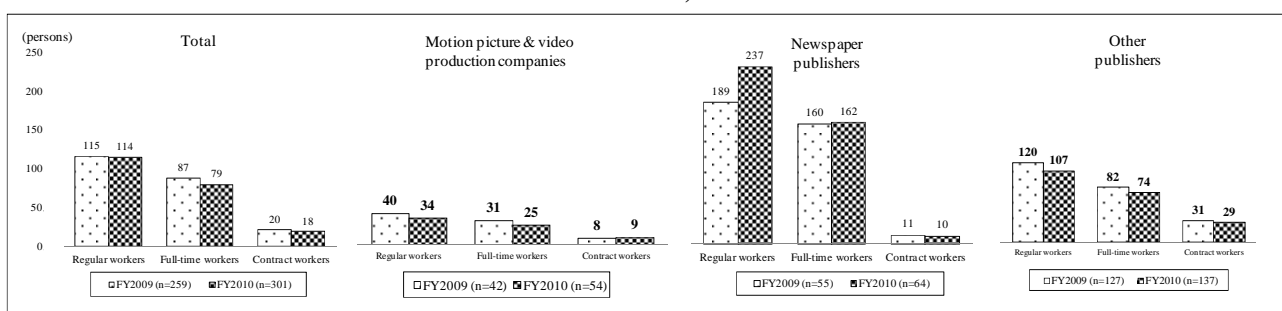
(Note) "Sales-based payment" refers to a payment method based on the sales and profits of the orderer.



## 6. Number of workers in the development and production section

- The number of regular workers per company was 114 (down 0.9%). The number of full-time workers was 79 (down 9.2%).
- Among major sectors, the percentage of contract workers among regular workers was low for newspaper publishers.
- Looking at the rate of those newly hired and that of resignees for full-time workers were, 2.6% (up 0.1 points) and 3.5% (down 0.1 points), respectively. The rate of contract workers newly hired was 6.7% (down 0.8 points), and that of those with cancelled contracts was 22.9% (down 2.4 points). The rate of those with cancelled contracts was higher than that of resigned full-time workers.

**Fig. 6-14 Number of Regular Workers per Company in the Development and Production Section (Major Sectors)**



**Fig. 6-15 New Hires and Resignees**

		Full-time workers (persons)							Contract workers (persons)				
		Percentage of those newly hired and resignees (%)							Percentage of those newly hired and those with cancelled contracts (%)				
		FY2009	FY2010	FY2009	FY2010	Vs. previous fiscal year (points)			FY2009	FY2010	FY2009	FY2010	Vs. previous fiscal year (points)
Number of those newly hired		578	631	2.5	2.6	0.1	Number of those newly hired		526	480	7.5	6.7	-0.8
New graduates		434	431	1.9	1.8	-0.1	New graduates		178	101	2.5	1.4	-1.1
Mid-career workers		144	200	0.6	0.8	0.2	Mid-career workers		348	379	4.9	5.3	0.4
Number of resignees		845	865	3.6	3.5	-0.1	Number of those with cancelled contracts		1,776	1,656	25.3	22.9	-2.4
Number of full-time workers + Number of resignees		23,369	24,528	-	-	-	Number of contract workers + Number of those with cancelled contracts		7,033	7,217	-	-	-
(Notes) Percentage of those newly hired = Number of those newly hired / (Number of full-time workers + Number of resignees)×100													
Percentage of resignees = Number of resignees / (Number of full-time workers + Number of resignees)×100													
Number of mid-career workers = Number of those newly hired - Number of new graduates who were newly hired													
(Notes) Percentage of those newly hired = Number of those newly hired / (Number of contract workers + Number of those with cancelled contracts)×100													
Percentage of those with cancelled contracts = Number of those with cancelled contracts / (Number of contract workers + Number of those with cancelled contracts)×100													
Number of mid-career workers = Number of those newly hired - Number of new graduates who were newly hired													

**Fig. 6-16 Number of Regular Workers in the Development and Production Section**

(Unit: companies, persons, %)

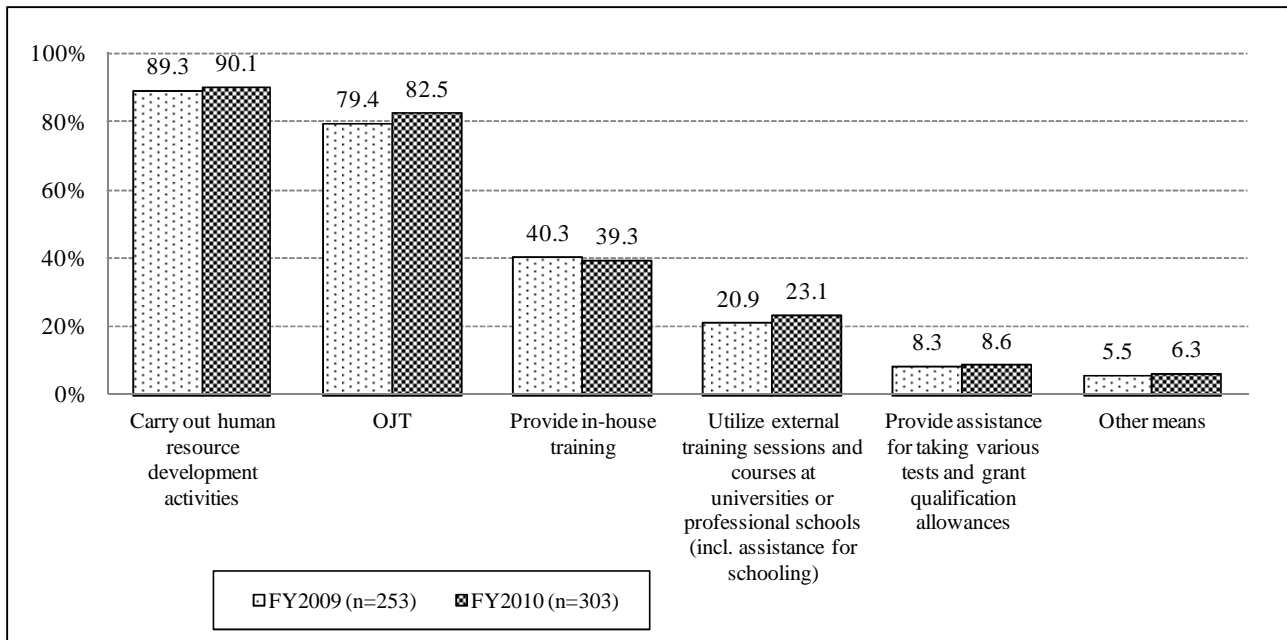
(Only companies persons, %)

		Number of companies that provided valid responses	Number of regular workers	Full-time workers/Regular staff members	Part-timers	Contract workers	Temporary or daily workers	Dispatched workers
Total	FY2009	259	29,851	22,524	1,198	5,257	263	720
	FY2010	301	34,187	23,663	1,114	5,561	68	1,283
	Year-on-year (%)	16.2	14.5	5.1	-7	5.8	-74.1	78.2
Motion picture & video production companies	FY2009	42	1,678	1,316	12	329	7	20
	FY2010	54	1,857	1,340	31	464	6	76
Animation production companies	FY2009	8	951	583	4	362	32	33
	FY2010	9	617	303	3	307	2	11
Recording and disk production companies	FY2009	3	21	15	-	6	-	-
	FY2010	4	122	100	-	22	-	-
Newspaper publishers	FY2009	55	10,370	8,785	420	600	33	192
	FY2010	64	15,172	10,341	639	617	19	553
Other publishers	FY2009	127	15,229	10,426	600	3,921	173	387
	FY2010	137	14,686	10,118	413	3,930	36	532
Commercial art and graphic design companies	FY2009	12	789	721	61	7	3	6
	FY2010	14	944	834	6	95	-	50
Motion picture, video & TV program distribution companies	FY2009	5	311	307	2	-	-	6
	FY2010	6	226	218	1	6	-	10
Service companies incidental to video picture, sound information, character information production & distribution	FY2009	7	502	371	99	32	15	76
	FY2010	13	563	409	21	120	5	51

## 7. Human resource development in the development and production section

- Companies that carried out human resource development activities accounted for 90.1% (up 0.8 points). Companies that provided OJT accounted for 82.5% (up 3.1 points).

**Fig. 6-17 Percentage of Companies that Carried Out Human Resource Development Activities**  
(multiple answers allowed)





(As of March 31, 2011)

(As of March 31, 2011)

- ☆ 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, 2011, for this survey and **enter the settlement results for fiscal 2010. 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 September 15, 2011.**

## 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 2010	0104	(i) Circle the applicable number regarding the organizational restructuring after April 2010.  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 2010 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 <hr/> 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

2011 Survey

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

(As of the end of FY2010)

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
<b>Total ① (A+B)</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	
	<b>Total ②</b>			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).

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

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

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

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

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

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

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

(Note 1) "Temporary or daily workers (0221)" refer to persons who are employed for a period of up to one month, or those who are brought in on a daily basis.  
 (Note 2) "Dispatched workers (0222)" refer to workers who are employed by a worker dispatching business operator and are engaged in your company's operations under your company's supervision and command, based on a contract between your company and the worker dispatching business operator concerned, under the aforementioned employment relationship.

### 3 Parent Company, Subsidiary and Affiliate Status

2011 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 FY2010)

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 FY2010)

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

(FY2010)

(FY2010)

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

2011 Survey

### (1) Assets, liabilities and net assets

(As of the end of FY2010)

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

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

### (2) Investment in affiliates

(As of the end of FY2010)

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

(FY2010)

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

(FY2010)

Classification		million yen			
Dividends (including interim dividends)	0451				

## 5 Business Performance

### (1) Sales and expenses, etc.

(FY2010)

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

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

### (2) Breakdown of expenses

(FY2010)

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

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

### (3) Information processing and communication expenses

(FY2010)

Accounting item		million yen			
Information processing and communication expenses	0520				

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

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

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

(FY2010)

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 (0401–0424, 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**

(FY2010)

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**

(FY2010)

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

2011 Survey

### (1) Sales conditions

(FY2010)

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

(FY2010)

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

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

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

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

## 7 Status of Businesses Outsourcing

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

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

0701

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

(FY2010)

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

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

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

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

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

0704

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

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

(FY2010)

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

2011 Survey

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

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

(2) Research and development expenses and investment

(FY2010)

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

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

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

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

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

(3) Capacity development expenses

(FY2010)

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 FY2010)

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

(FY2010)

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

(FY2010)

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

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

(1) Number of directors 1001

Enter the number of directors in your company.

In-house directors	External directors	Affiliates

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

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

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

1002

1. Yes

2. No

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

1003

Does your company employ stock options?

1. Yes

2. No



# 2011 Basic Survey on the Information and Communications Industry (II)

(Telecommunications and Broadcasting)

(As of March 31, 2011)

- ☆ 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, 2011, for this survey and **enter the settlement results for fiscal 2010. 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 September 15, 2011.**

## 1 Company Profile

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

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

## 2 Business Performance

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

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

### 3 Financial Status

#### (1) Fund procurement and fund management

Enter the status of procurement and management of long-term funds, on the basis of the net increase or decrease by category (see "Guide for Completing the Survey for 2011 Basic Survey on the Information and Communications Industry (II) (Telecommunications and Broadcasting)").

< On the whole-company basis >

Category		FY2010 Performance						FY2011 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 FY2010								

(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.

		million yen							
Total forecast sales in the telecommunications business for FY2011									

**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 FY2010								

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

		million yen							
Total forecast sales in the broadcasting business for FY2011									

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 FY2010								

(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.

Total forecast sales in the cable television broadcasting business for FY2011		million yen							

(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

< FY2010 >

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

< FY2010 >

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

< FY2010 >

Category	million yen							
Program purchase expenses								
Program production expenses								
Subtotal								

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

## 4 Amount of Acquisition and Capital Investment

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

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

### ① Telecommunication business

Category	FY2010 Performance						FY2011 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	FY2010 Performance						FY2011 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	FY2010 Performance						FY2011 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 FY2010 >

(persons)

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

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

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

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

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

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

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

## 6 Status of Businesses Outsourcing

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

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

### ① Telecommunications business

1. Implemented outsourcing in FY2010 ⇒ Enter (2)  
 2. Did not implement outsourcing ⇒ Go to 7

### ② Broadcasting business

1. Implemented outsourcing in FY2010 ⇒ Enter (2)  
 2. Did not implement outsourcing ⇒ Go to 7

### ③ Cable television broadcasting business

1. Implemented outsourcing in FY2010 ⇒ 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

<FY2010>

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

<FY2010>

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

<FY2010>

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) <div style="border: 1px solid black; height: 100px; width: 100%;"></div>
17	Cloud computing services		
18	Web contents delivery		
19	IPTV services (Internet video delivery)		
20	Electronic authentication services		
21	Information network security services	39	No future business operation planned
22	Charging/settlement agent services		

General  
Statistics

# 2011 Basic Survey on the Information and Communications Industry (III)

(Broadcast Program Production)

(As of March 31, 2011)

- ☆ 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, 2011, for this survey and **enter the settlement results for fiscal 2010. 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 September 15, 2011.**

## 1 Company Profile

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

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

## 2 Business Performance

### (1) Broadcast media for programs that your company produces

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

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

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

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

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

(Note 4) Including commercial messages.

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

**(2) Types of programs that your company produces**

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

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

**(3) Contents of the program production business**

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

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

**(4) Other business details**

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

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

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

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

Classification	FY2010 Performance					FY2011 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 (FY2010 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 (FY2010 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	FY2010 Performance						FY2011 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 FY2010)			
	Purchased		Rental	
	unit	Digitalized ones unit	unit	Digitalized ones unit
VTRs				
Cameras				
Editing machines				

## 5 Workers

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

< As of the end of FY2010 >

(persons)

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

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

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

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

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

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

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

## 6 Number of Contracts for Broadcasting Programs, etc.

### (1) How you start program production

Presuming the total number of program production-related contracts concluded in FY2010 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 FY2010, 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 FY2010, 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 FY2010				
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 FY2010.

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

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 FY2010?

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 FY2010 ⇒ 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.

< FY2010 >

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

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

## 8 Business Operation

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

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

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

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

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

## 9 Future Business Operation

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

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

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

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



## 10 Management Problems

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

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

(As of March 31, 2011)

- ## 1 Company Profile

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

- 1 -

## 2 Sales

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

Classification		million yen							Percentage of advertising revenue
1	Web information search services								%
2	Internet shopping site operation services								%
3	Internet auction site operation services								%
4	Electronic bulletin board services, blog services, and SNS operation services								%
5	Web contents delivery services								%
5-1	Revenue from IPTV services								
6	Cloud computing services (excluding software development)								
7	Electronic authentication services								
8	Information network security services								
9	Charging/settlement agent services								
10	Server management consignment								
11	Other Internet based services ( )								
12	Total sales of Internet based service business in FY2010								

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

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

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

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

	million yen						
Total forecast sales for Internet base services in FY2011							

## 3 Number of Registered Tenants and Customers

Enter the number of registered tenants and customers as of March 31, 2011.

< As of the end of FY2010 >

	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	FY2010 Performance						FY2011 Forecast					
	million yen						million yen					
Amount of acquisition and capital investment												
Information and communications equipment												
Software												

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

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

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

#### 5 Status of Businesses Outsourcing

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

1. Implemented outsourcing in FY2010 ⇒ 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.

< FY2010 >

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

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

## 6 Workers

Enter the number of workers for your company's Internet based service business. Also enter the total number of newly hired full-time workers, the number of new graduates among them, and the number of resignees; and the total number of newly hired contract workers, the number of new graduates among them, and the number of those with cancelled contracts in FY2010.

Internet based service business	Number of workers (As of the end of FY2010)	Newly hired full-time workers and contract workers		Resignees and those with cancelled contracts (FY2010)
		(FY2010)	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)

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

## 8 Business Operation

Circle the applicable number regarding your company's business operation policy for your 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)

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

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

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

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

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

## 9 Efforts for Acquiring Certification

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

< As of the end of FY2010 >

	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: 150px; margin-top: 10px;"></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	Cloud computing services		
18	Web contents delivery		
19	IPTV services (Internet video delivery)		
20	Electronic authentication services		
21	Information network security services		
22	Charging/settlement agent services		
		36	No new businesses planned



# 2011 Basic Survey on the Information and Communications Industry (V)

## (Information Services)

(As of March 31, 2011)

- ☆ 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, 2011, for this survey and **enter the settlement results for fiscal 2010. 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 September 15, 2011.**

### 1 Company Profile

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

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



## 2 Sales

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

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

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

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

Classification		million yen				Percentage of overseas sales
Custom software services	2002					%
Embedded software services	2003					%
Package software services	2004					%
Game software services	2005					%
Data processing services	2006					%
Research and information services, except marketing or opinion research services	2007					%
Miscellaneous data processing and information services	2008					%
Total sales of information service business in FY2010	2009					%

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

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

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

## 3 Operating Expenses

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

< FY2010 >

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

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

< FY2010 >

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

(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 FY2010 >

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

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

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

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

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

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

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

5 Situation of the Development and Production Section

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

5001

1. Yes

2. No



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

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

(1) Status of Businesses Outsourcing

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

5101

1. Implemented outsourcing in FY2010

⇒

Enter ② and ③

2. Did not implement outsourcing

⇒

Go to (2)

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

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

< FY2010 >

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).

< FY2010 >

		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 FY2010 | ⇒ | Enter ② and ③ |
|      | 2. Did not accept work from other companies     | ⇒ | Go to (3)     |

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

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

<FY2010>

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

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

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

<FY2010>

		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 FY2010.

(persons)

Development and production section		Number of workers (As of the end of FY2010)	Newly hired full-time workers and contract workers (FY2010)		Resignees and those with cancelled contracts (FY2010)
				New graduates	
Regular workers (excl. temporary or daily workers)	5301				
Full-time workers (excl. workers transferred to other companies)	5302				
Part-timers	5303				
Workers transferred to other companies	5304				
Contract workers (incl. freelancers)	5305				
Temporary or daily workers	5306				
Dispatched workers	5307				

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

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

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

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

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

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

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

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

(persons)

Development and production section		Number of workers (As of the end of FY2010)	Newly hired full-time workers and contract workers (FY2010)	Resignees and those with cancelled contracts (FY2010)
Foreign full-time workers	5308			
Asian	5309			
Chinese	5310			
Indian	5311			
Vietnamese	5312			
Philippines	5313			
American	5314			
Foreign contract workers (incl. freelancers)	5315			
Asian	5316			
Chinese	5317			
Indian	5318			
Vietnamese	5319			
Philippines	5320			
American	5321			

### (4) Wage system for engineers

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

**5401**

Full-time workers

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

**5402**

Contract workers (incl. freelancers)

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

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

**(5) Wages (annual income) of engineers**

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

① Enter the average annual income.

<FY2010>

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

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

**5503** Full-time workers

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

**5504** Contract workers (incl. freelancers)

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

**(6) Human resource development**

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

**5601**

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

② Does your company use the following indicators for fostering and assessing engineers? Circle the applicable number.

**5602** IT Skill Standards (ITSS)

1. Yes
2. No

**5603** Embedded Technology Skill Standards (ETSS)

1. Yes
2. No

**5604** Users' Information Systems Skill Standards (UISS)

1. Yes
2. No

## (7) Business operation

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

- ① Is your company now carrying out any business-academia collaboration? What are your future plans?  
(ex. Joint development, joint production, consignment and acceptance of research, etc. with universities)

5701

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

- ② Is your company now carrying out any employee training by utilizing universities, etc.? What are your future plans?  
(ex. Recurrent education (re-education and learning at universities), and employee training by invited university teachers, etc.)

5702

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

- ③ Is your company now providing any cooperation for university education? What are your future plans?  
(ex. Acceptance of student and teacher interns, giving of donations, and dispatch of lecturers, etc.)

5703

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

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

5704

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

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

5705

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

**(8) Development of game software**

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

5801

1. Yes

2. No

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

Fill in your answers for ① to ④.

① Enter the number of contents and works of games that your company developed in FY2010.

< FY2010 >

		Number of contents and works
Number of developed games	5802	

② Regarding the games that your company developed (① above), enter the ratio of your company's rights as of March 31, 2011.

< As of the end of FY2010 >

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

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

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

Yes		To some extent	Neutral	Not really	No
5807	1	2	3	4	5

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

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



# 2011 Basic Survey on the Information and Communications Industry (VI)

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

(As of March 31, 2011)

- ☆ 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, 2011, for this survey and **enter the settlement results for fiscal 2010. 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 September 15, 2011.**

### 1 Company Profile

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

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



## 2 Sales

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

Classification			million yen			
Content production section	Motion picture and video production, except television program and animation production	2001				
	Animation production	2002				
	Recording and disk production	2003				
	Newspaper publishers	2004				
	Publishers, except newspapers	2005				
	Commercial art and graphic design	2006				
	Motion picture, video and television program distribution	2007				
	News syndicates (News suppliers)	2008				
	Miscellaneous services incidental to video picture, sound information, character information production and distribution	2009				
Total sales of video picture, sound information, character information production and distribution business in FY2010		2010				

## 3 Business Operation

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

< As of the end of FY2010 >

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

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

## 4 Charge System

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

4001

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

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

## 5 Situation of the Content Production Section

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

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

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

5001

1. Yes

2. No

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

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

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

- ① Enter the number of contents (works) that your company produced in FY2010.

Count all series with the same title as one.

<FY2010>

		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, 2011.

< As of the end of FY2010 >

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

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

### (2) Copyrights

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

5201

Packaged (CDs, DVDs, etc.)

1. Yes

2. No

5202

Delivered (Internet delivery, mobile phone delivery)

1. Yes

2. No

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

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

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

	Close to A		Closer to A than B		Neutral		Closer to B than A		Close to B
5203	1	-----	2	-----	3	-----	4	-----	5

### (3) Operating expenses

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

<FY2010>

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

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

<FY2010>

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

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

### (4) Status of Businesses Outsourcing

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

5401	1. Implemented outsourcing in FY2010	⇒	Enter ② and ③
	2. Did not implement outsourcing	⇒	Go to (5)

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

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

<FY2010>

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

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

<FY2010>

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 FY2010.

(person)

Content production section		Number of workers (As of the end of FY2010)	Newly hired full-time workers and contract workers (FY2010)		Resignees and those with cancelled contracts (FY2010)
				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.

<FY2010>

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

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

5703

Full-time workers

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

5704

Contract workers (incl. freelancers)

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

## (8) Human resource development

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

5801

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

(9) Documentation

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

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

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

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

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

6 Situation of the Video Picture and Music Production Section

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

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

6001	1. Yes	2. No	→ You do not need to answer any more questions. Thank you for your cooperation.
------	--------	-------	---

Enter the number of regular workers (excluding temporary or daily workers) of the section by location of your business offices (including cases where a company has only one business office).

When your company has multiple offices, enter information for the five offices with the largest number of regular workers.

< As of the end of FY2010 >

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