



**Communications and Information
Network Association of Japan**

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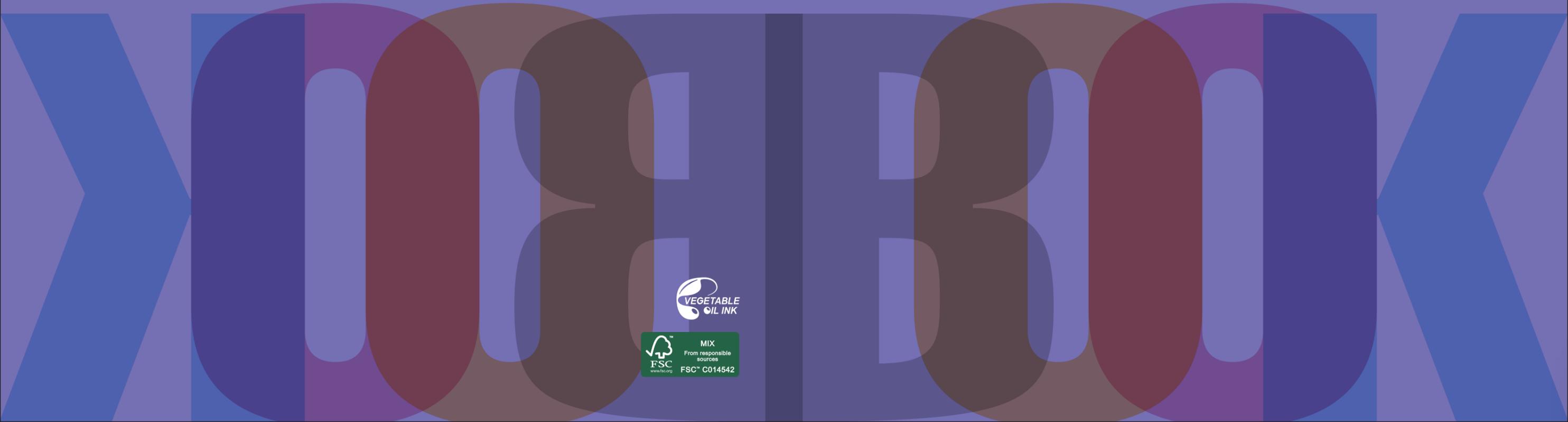
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YEARBOOK 2015

COMMUNICATIONS
AND
INFORMATION
NETWORK
ASSOCIATION
OF
JAPAN



Message from the Chairman

As the world experiences an exploding population and urbanization, it is expected to face serious shortages of resources vital to everyday life. On the other hand, Japan will need to maintain its current infrastructure and social systems despite its rapidly aging population. It will be the role of the ICT industry to contribute to such social issues, while enhancing its own capabilities.

Furthermore, 2015 will be the year in which preparations for the 2020 Olympic and Paralympic Games move forward in full gear. This international event will be a stage for CIAJ and Japan's ICT industry to prove that its state-of-the-art top-class technology and services are capable of contributing to global development.

As the organization which speaks on behalf of Japan's ICT industry, CIAJ will cooperate with industry and relevant government offices on domestic issues while working in close coordination with counterpart organizations abroad on global issues to:

- 1) make policy proposals to stimulate the ICT industry,
- 2) create new business opportunities,
- 3) and tackle the various challenges faced by the info-communication industry for a more abundant society.



Nobuhiro Endo
Chairman

Dr. Endo joined NEC Corporation in 1981 as a microwave engineer. He made a significant contribution to the company through the development of many wireless telecommunication systems, especially short-haul microwave systems which are widely used in current mobile networks throughout the world. He was promoted to EVP in 2009 and has been President and CEO of the company since 2010.

Dr. Endo received his B.E., M.E. and Ph.D degrees from The Tokyo Institute of Technology.

Who we are

The Communications and Information networks Association of Japan was established in 1948 as a voluntary industry association composed mainly of telecom terminal manufacturers and network infrastructure vendors. In October 2009, CIAJ embarked on a new page in its history by becoming a general incorporated association. The core Regular Members are manufacturers of telecom equipment, including network devices and mobile handsets, while other industry players, such as telecom carriers and solution vendors participate as Forum Members. All in all, CIAJ has 221 companies and organizations on its membership as of August, 2015. As part of upholding CIAJ's basic principle of creating new business opportunities and contributing to the robust growth of the industry, we will strengthen our efforts to promote policies and raising awareness of industry positions, attain tangible achievements from committee activities, and enhance our efforts to disseminate information to a wide audience.

Mission Statement

Working hand-in-hand with our member companies, CIAJ is a general incorporated association committed to the healthy development of info-communication network industries through the promotion of ICT. CIAJ also strives for the realization of a socially, economically and culturally enriching society in Japan as well as in the global community, by supporting advanced and widely available uses of information.

CIAJ Management Team (As of September, 2015)

Board of Directors



Chairman
Nobuhiro Endo
President,
NEC Corporation



Director
Hirokazu Hashimoto
President,
Anritsu Corporation



Director
Tsuneo Kondo
President,
Iwatsu Electric Co., Ltd.



Director
Yasuyoshi Katayama
President,
CIAJ



Director
Masamichi Imai
Executive Vice
President,
CIAJ

Senior Steering Committee Members



Nobuhiro Endo
President,
NEC Corporation



Masami Yamamoto
Chairman,
Fujitsu Limited



Hideichi Kawasaki
President,
OKI Electric Industry Co., Ltd.



Toshiaki Higashihara
President,
Hitachi, Ltd.



Shusaku Nagae
Chairman,
Panasonic Corporation



Kenichiro Yamanishi
Chairman,
Mitsubishi Electric Corporation



Shigeaki Mizushima
Chairman,
Sharp Corporation



Masashi Muromachi
President,
Toshiba Corporation

Steering Committee Members

ANRITSU CORPORATION

IWATSU ELECTRIC CO., LTD.

SAXA, INC.

DENKI KOGYO CO., LTD.

JAPAN RADIO CO., LTD.

SHINDENGEN ELECTRIC MFG. CO., LTD.

HITACHI KOKUSAI ELECTRIC INC.

KYOCERA CORPORATION

TAMURA CORPORATION

Message from the President

One of the traits that make CIAJ unique is our broad membership, which includes not only ICT equipment manufacturers, but telecommunication carriers, solution providers, think tanks, and experts from academia. CIAJ takes a leading role in promoting the use of ICT in tackling diverse social issues by making proposals that incorporate the diverse views, experience, expertise and insights of our members to relevant government authorities. We also strive to be effective advocates for our members via our alliances with industry associations abroad, so that they gain fair access to foreign markets.

CIAJ's Forum activities center on the 15 Working Groups, which looks into themes that are difficult to pursue on an individual enterprise level, but possible when done in collaboration with other entities from various fields of expertise. It is a unique endeavor to create new business models. These Working Groups and Committees conduct seminars focusing on state-of-the-art technologies and trends, with approximately 90 seminars held in 2014 and about 6,000 participants.

As part of our efforts to create business opportunities for member companies, every October, CIAJ organizes CEATEC Japan, the largest exhibit of ICT and electronics in Asia. ICT has become the underlying platform in all areas of our society and its influence penetrates every aspect of our lifestyle. This is reflected in the success of CEATEC Japan 2014, with 547 exhibitors, of which 150 were from overseas, attracting 150,912 visitors.

Another pillar of CIAJ activities is the timely provision of pertinent information to our members. Our statistical research strives to make domestic and foreign production/sales figures more tangible, while keeping up with global trends in markets and supply chain.

CIAJ will continue to contribute to the growth of the ICT industry in 2015.



片山泰祥

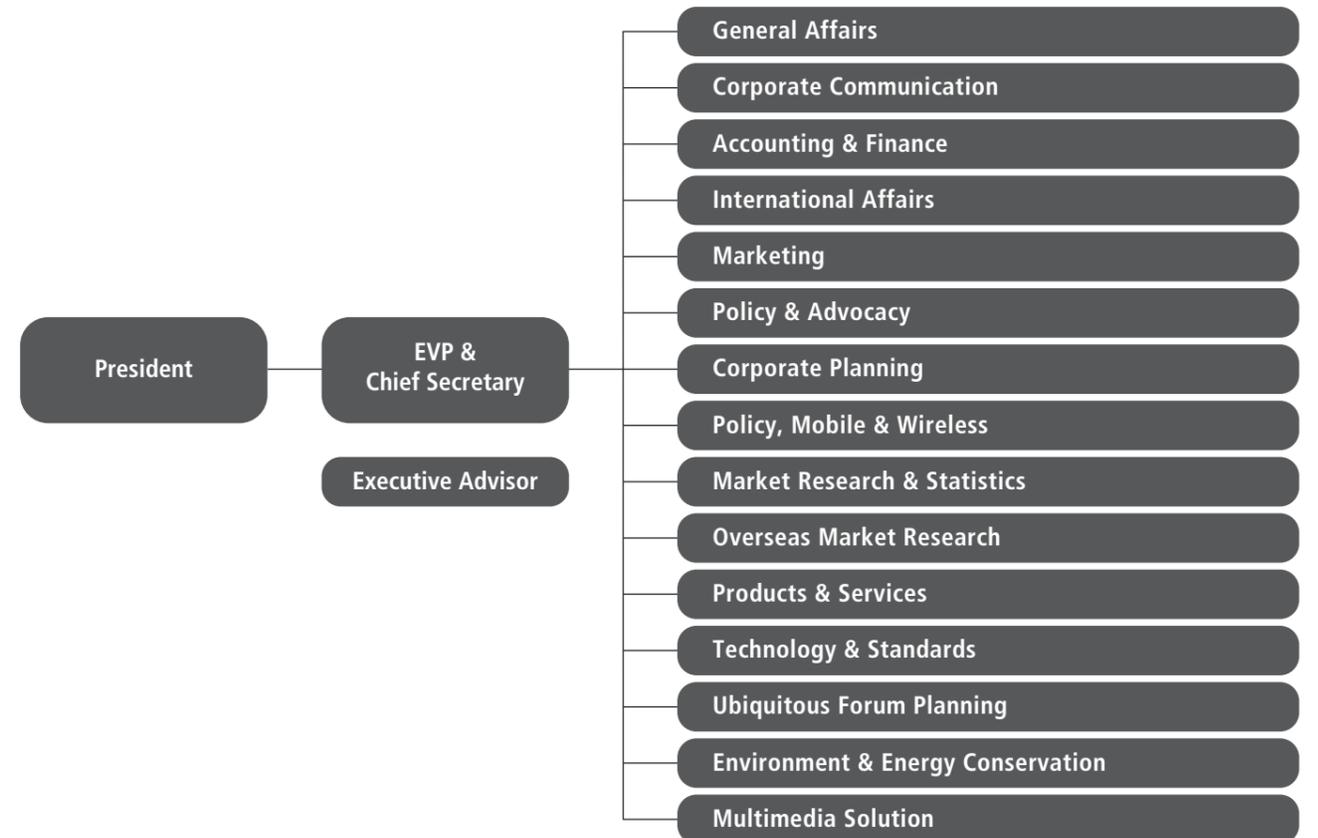
Yasuyoshi Katayama
President

Mr. Katayama joined Nippon Telegraph and Telephone Public Corporation in April 1976. He has devoted his career to the development of network services and investment in network facilities. In June 2012, he was elected to the position of Senior Executive Vice President of the NTT. In May 2015, he became President of the Communications and Information Network Association of Japan.

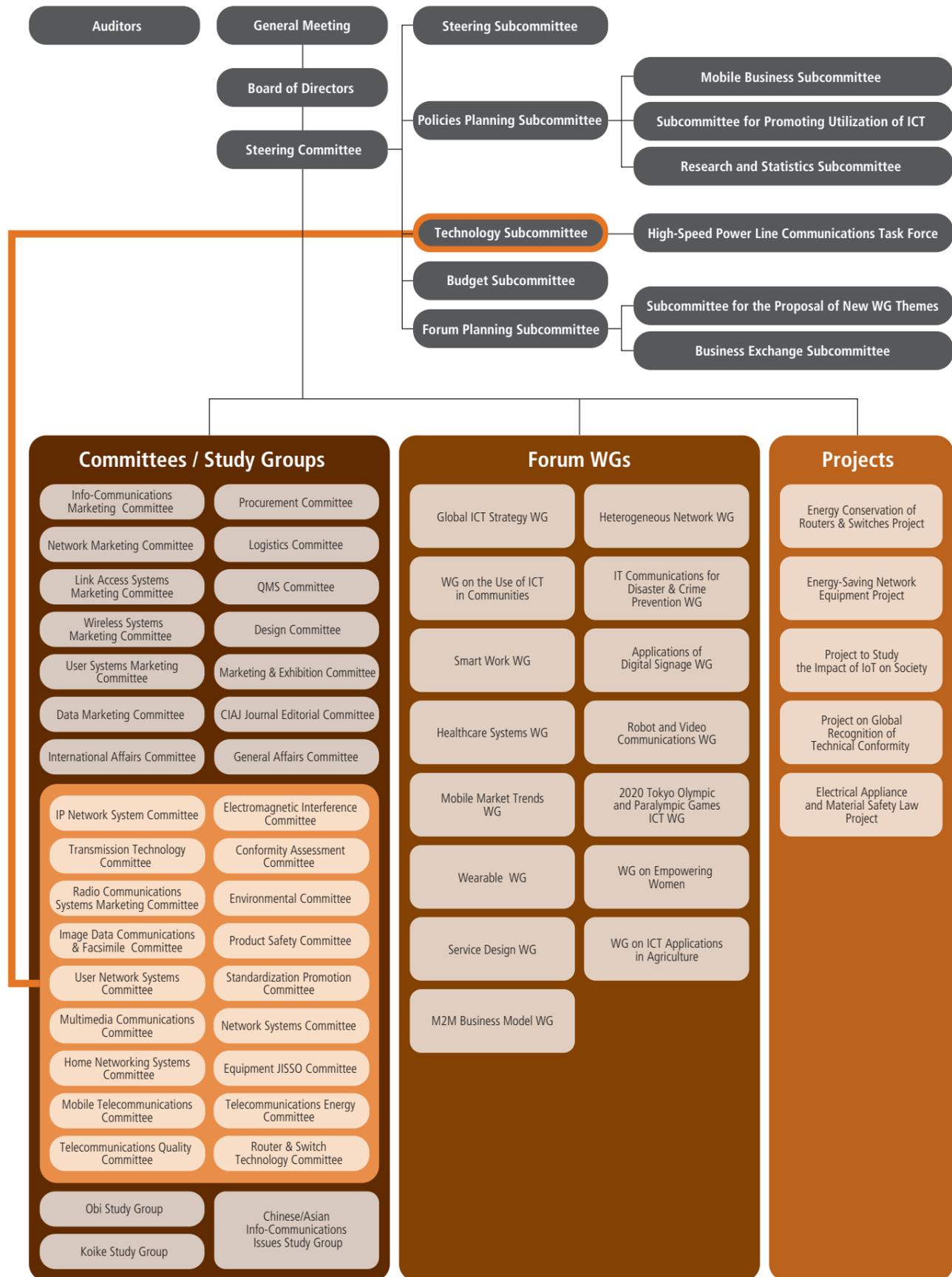
CIAJ Secretariat Team (As of October, 2015)

 Yasuyoshi Katayama President	 Masamichi Imai Executive Vice President & Chief Secretary	 Prof. Dr. Toshio Obi Executive Advisor (Professor, Waseda Univ. Graduate School) (Ambassador of ITU Secretary General for Academia) (President, Int'l Academy of CIO)
 Hironori Takeuchi VP, General Affairs & Corporate Communication	 Hiroaki Hattori VP, Accounting & Finance	 Toshiharu Kiyomoto VP, International Affairs & Overseas Market Research
 Mitsuru Tsuchida VP, Corporate Planning	 Osamu Kosuge VP, Policy, Mobile & Wireless	 Seiji Nakai VP, Market Research & Statistics
 Junichi Kojima VP, Ubiquitous Forum Planning	 Noriyoshi Iizuka VP, Environment & Energy Conservation	 Masao Ootsubo VP, Multimedia Solution
		 Tetsuo Sasaki VP, Marketing
		 Masanori Kamata VP, Policy & Advocacy
		 Hiroaki Hayashi VP, Products & Services
		 Yoshio Miyamori VP, Technology & Standards

Functional Departments



CIAJ Organization (As of September, 2015)



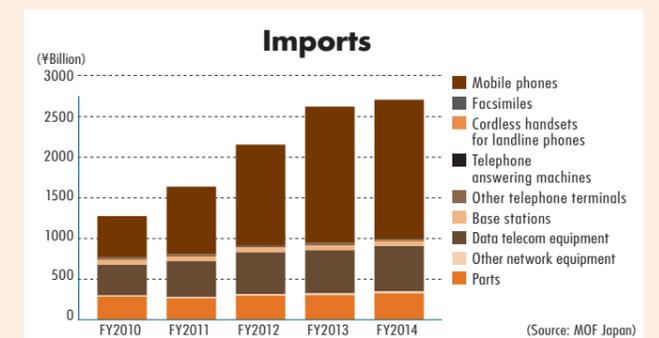
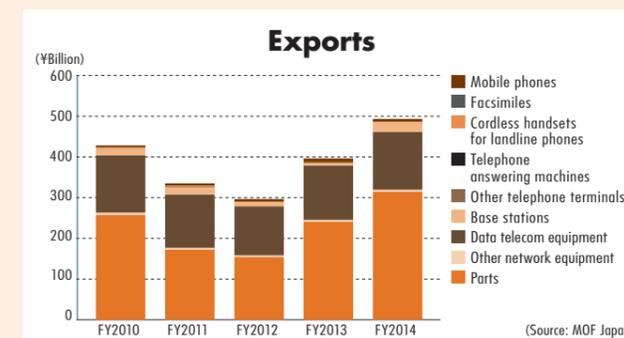
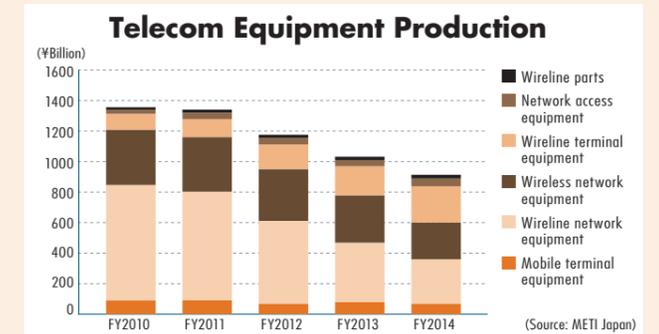
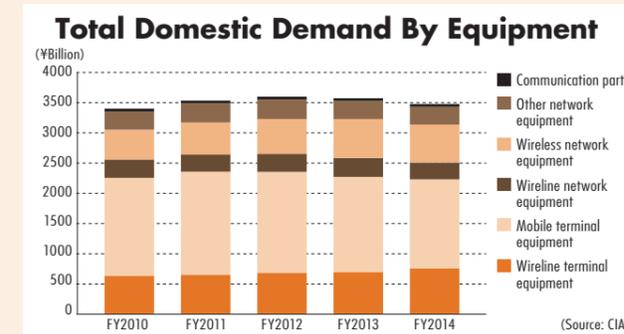
Japan Market

1. 2014 Market

According to the industrial production statistics released by the Ministry of Economy, Trade and Industry, gross domestic production of communication equipment continued to decline for four consecutive years. As a result, domestic production was 913.1 billion yen, declining 11.5% over fiscal year 2013.

In addition, according to the Japan Trade Statistics announced by the Ministry of Finance, total exports for FY2014 increased by 24.5%, or double-digits for 2 consecutive years over the previous fiscal year. Total imports, which had recorded four consecutive years of two-digit growth to FY2013, slowed to a 3.2% increase over FY2013. As a result, total exports amounted to 491.6 billion yen and total imports 2.702 trillion yen.

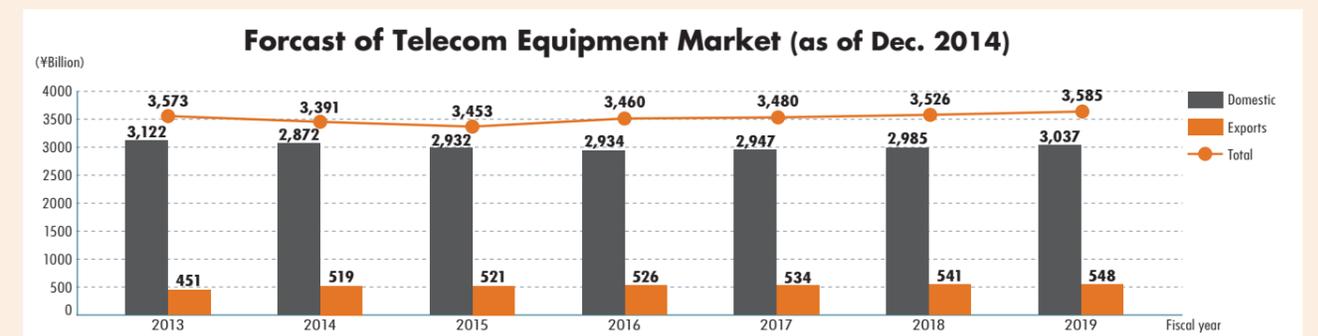
* Exchange rates used for FY2013 figures was 102.2 yen /dollar and 120.8 yen /dollar for FY2014.



2. CIAJ Mid-Term Demand Forecast for Telecommunication Equipment [2014-2019]

CIAJ released the "FY2014 – FY2019 Mid-Term Demand Forecast for Telecommunication Equipment" in December, 2014. Progress in LTE-advanced and ubiquitous computing are expected to encourage fixed and mobile communication networks to merge and create of faster mobile broadband services.

Although fluctuations in the Japanese economy will have an impact on the industry, the overall telecommunication equipment market is expected to have hit bottom in FY2014, and CIAJ forecasts a gradual demand growth thereafter with further popularity in mobile terminal use and investment towards the 2020 Tokyo Olympic and Paralympic Games as stimuli.



CIAJ Activity Highlights in 2014

Policies and Advocacy

CIAJ's domestic advocacy activities in 2014 continued to focus on proposals to Japan government bodies, political parties and relevant authorities in order to improve business environment and to stimulate innovation.

Our major agendas are

- 'Promoting innovation through ICT to resolve social challenges which can serve as global business models,'
- 'Applying ICT to invigorate local communities'
- 'Using ICT to increase readiness against emergencies and minimize risks from natural disasters', and
- 'Supporting relevant R&D and nurturing ICT talent for Japan's future.'

CIAJ has historically treasured the opportunity to exchange opinions and views face to face with target authorities regularly for smooth and effective advocacy. In 2014 CIAJ conducted opinion-exchange meetings from time to time on the topics of IoT, radio spectrum, wireless business, market statistics and ICT contribution toward 2020 Olympic Games.

In 2014, CIAJ worked alongside global counterpart ICT associations on three major initiatives. The first was in supporting the expansion of products covered in Information Technology Agreement (ITA). Agreement was reached to expand the list in July 2015. The second was in presenting industry views concerning liberalization of environmental goods negotiations at the WTO. The third was the voicing of the industry position against overly stringent cybersecurity initiatives which could hamper industry growth.

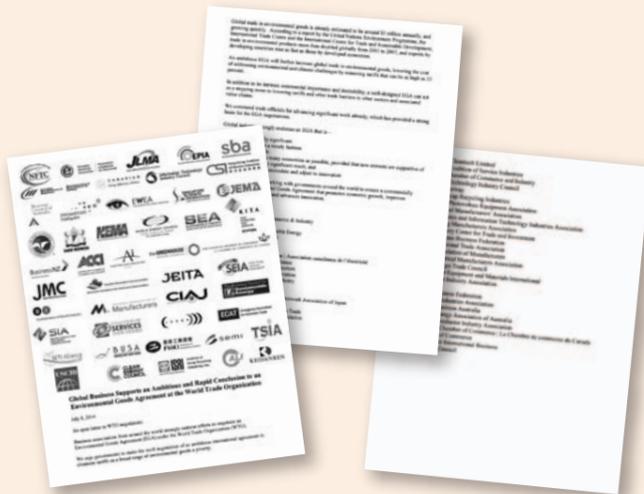


In December, 2014, over 80 industry associations from around the world urged swift conclusion on product expansion of Information Technology Agreement (ITA)

Taking advantage of longtime relationships with overseas and domestic associations and government bodies, CIAJ has captured timely information of anti-free trade movements throughout the world and taken effective actions by means of participating in public comments/public consultations and/or communications through diplomatic channels of Japan government as well as joint advocacy with overseas associations or direct communications with target governments.



Opinion-exchange meeting on Mobile Business between CIAJ and Japanese government in November 2014



On July 8th, 2014, 47 industry associations world-wide endorsed efforts to negotiate an Environmental Goods Agreement under WTO

Technologies, Product and Services

Proposing quality standards and assessment guidelines is a CIAJ activity to realize a safe and secure community.

- In 2014, CIAJ product and service oriented groups implemented the following:
 - established an operational guideline on 'body-SAR (Specific Absorption Rate),'
 - added an item on 700MHz-band high-way road systems to the same number certification guideline,
 - conducted a seminar at CEATEC JAPAN 2014 "Recent Trends of Technical Regulations Conformity Certification System," and
 - supported the Japanese government in holding the MRA (Mutual Recognition Agreements) International Workshop 2015.



Interconnectivity testing of multi-vendors' IP cameras

In order to grow Ethernet business opportunities, CIAJ, as a secretariat to HATS (Harmonization of Advanced Telecommunication Systems) Conference, has conducted interoperability tests on various types of new products including 10G-EPON, IP cameras, IP-PBX and NGN compatible HDTV conference systems. The cumulative number of tested products is 1,515 to date.

Social Responsibilities and Environment

Enhancing Accessibility of ICT products and services

Accessibility improvement is a major agenda for Japan to welcome the increasing number of tourists towards the 2020 Tokyo Olympic Games. CIAJ established the Info-communication Access Council in 1998 to deliberate enhancement and assurance of accessibility for older adults and people with special needs in the planning, developing, and designing of ICT products and services. The above mark is attached to products where suitable accessibility is considered in accordance with the Council's guideline. The Info-communication Access Council updates 'Web-accessibility Policy Guidelines' every year reflecting its field survey results at relevant organizations.



Mobile Recycle Network(MRN)



Together with Telecommunication Carriers Association (TCA), CIAJ has been promoting the recycling of cellular phones and PHS terminals since April 2001 through the 'Mobile Recycling Network (MRN)', a system of collecting used cellular and PHS handsets, re-chargers and batteries regardless of carrier or maker. MRN has collected approx. 110 million used phones in the past 14 years.

Tackling Environmental Issues

As one of the four leading associations representing the electrical and electronic industries of Japan (JEITA, JEMA, JBMIA, CIAJ), CIAJ's Environmental Committee promotes voluntary action plans to reduce the burden on our environment, such as initiatives to realize a low CO2 emission society and decreasing industrial waste/ VOC (volatile organic compound). The Committee also gathers information which is made available to CIAJ members and presents industry positions on domestic and global environmental regulations and policies.

Trade shows and other events



CEATEC JAPAN 2014 at Makuuhari Messe in October with 150,912 visitors and 547 exhibitors



West Japan ICT Forum 2014



Tsukuba Forum 2014



The 66th Baseball Tournament



CIAJ New Year's Reception



10th Asia Electrics Forum (AEF) at Hong Kong where Asian ICT Industry gathers once a year

CIAJ Members (As of October, 2015)

Regular Members (111 companies/organizations)

ACCESS CO., LTD.	JAPAN SMALL BUSINESS, CO-OP. FOR TELECOMMUNICATIONS EQUIPMENT AND MATERIALS	SANKEN ELECTRIC CO., LTD.
ALAXALA NETWORKS CORPORATION	KINKI DENKI CO., LTD.	SANKOSHA CORPORATION
ALPS ELECTRIC CO., LTD.	KONICA MINOLTA, INC.	SANKYU ELECTRONICS CORPORATION
ANRITSU CORPORATION	KOYO ELECTRIC CO., LTD.	SANRITZ ELECTRONICS CORPORATION
ASSOCIATION OF RADIO INDUSTRIES AND BUSINESS	KYOCERA CORPORATION	SANWA DENKI KOGYO CO., LTD.
BROTHER INDUSTRIES, LTD.	KYOCERA DOCUMENT SOLUTIONS INC.	SANYO DENKI CO., LTD.
BT JAPAN CORPORATION	KYOSAN ELECTRIC MFG. CO., LTD.	SAXA, INC.
BUFFALO INC.	MARUBUN CORPORATION	SEIKO EPSON CORPORATION
CANON INC.	MEIDENSHA CORPORATION	SEIKO SOLUTIONS INC.
CANON MARKETING JAPAN INC.	mitsubishi electric corporation	SHARP CORPORATION
CASIO COMPUTER CO., LTD.	mitsumi electric co., ltd.	SHINDENGEN ELECTRIC MFG. CO., LTD.
CHUKO ELECTRIC CO., LTD.	MIYAKAWA ELECTRIC WORKS, LTD.	SHIN-KOBE ELECTRIC MACHINERY CO., LTD.
CHUO ELECTRIC WORKS, CO., LTD.	MURATA MACHINERY, LTD.	SONY CORPORATION
CIENA COMMUNICATIONS JAPAN CO., LTD.	MURATA MANUFACTURING CO., LTD.	SONY MOBILE COMMUNICATIONS JAPAN, INC.
DAITO COMMUNICATION APPARATUS CO., LTD.	NAKAYO, INC.	SPC ELECTRONICS CORPORATION
DENKI KOGYO CO., LTD.	NCXX INC.	STANLEY ELECTRIC CO., LTD.
ERICSSON JAPAN K.K.	NEC CORPORATION	SUMITOMO ELECTRIC INDUSTRIES, LTD.
FUJI ELECTRIC CO., LTD.	NEC MAGNUS COMMUNICATIONS, LTD.	TAKACHIHO SANGYO CO., LTD.
FUJI XEROX CO., LTD.	NEC MOBILE COMMUNICATIONS, LTD.	TAKACOM CORPORATION
FUJITSU COMPONENT LIMITED	NEC PLATFORMS, LTD.	TAMURA CORPORATION
FUJITSU LIMITED	NEIX, INC.	TERADA ELECTRIC WORKS CO., LTD.
FUNAI ELECTRIC CO., LTD.	NIHON DENGYO KOSAKU CO., LTD.	THE FURUKAWA BATTERY CO., LTD.
GENESYS CORPORATION	NISHIYAMA CORPORATION	THE FURUKAWA ELECTRIC CO., LTD.
GS YUASA INTERNATIONAL LTD.	NITTO KOGYO CORPORATION	TOKO, INC
HAKUSAN MFG. CO., LTD.	NOKIA SOLUTIONS & NWTWORKS CORP.	TOKURIKI SEIKO CO., LTD.
HELLERMANNTYTON CO., LTD.	NTT ADVANCED TECHNOLOGY CORPORATION	TOKYO COMMUNICATION EQUIPMENT MFG. CO., LTD.
HIROSE ELECTRIC CO., LTD.	OI ELECTRIC CO., LTD.	TOMEI TSUSHIN KOGYO CO., LTD.
HITACHI INFORMATION & TELECOMMUNICATION ENGINEERING, LTD.	OKI DATA CORPORATION	TOSHIBA CORPORATION
HITACHI KOKUSAI ELECTRIC INC.	ONKYO & PIONEER CORPORATION	TOSHIBA TEC CORPORATION
HITACHI METALS, LTD.	OKI ELECTRIC INDUSTRY CO., LTD.	TOTSU-SOKEN CORPORATION
HITACHI, LTD.	ORIGIN ELECTRIC CO., LTD.	UL JAPAN, INC.
HUAWEI TECHNOLOGIES JAPAN K.K.	OSAKI ELECTRIC CO., LTD.	VIAVI SOLUTIONS INC.
INTERPHONE INDUSTRY ASSOCIATION OF JAPAN	PANASONIC CORPORATION	WATANABE CO., LTD.
IRIICHI TECHNOLOGIES INC.	PANASONIC MOBILE COMMUNICATIONS CO., LTD.	YAMAHA CORPORATION
IWATSU ELECTRIC CO., LTD.	PANASONIC SYSTEM NETWORKS CO., LTD.	YAMAKO ELECTRIC MANUFACTURE CO.
JAPAN AVIATION ELECTRONICS INDUSTRY, LTD.	RAPIDTELECOM	YANMAR ENERGY SYSTEM CO., LTD.
JAPAN RADIO CO., LTD.	RICOH CO., LTD.	YOKOGAWA ELECTRIC CORPORATION

Forum Members (40 companies/organizations)

AMENITY RESEARCH INSTITUTE CO., LTD.	NDS CO., LTD.	NTT IT CORPORATION
C-CUBE CORPORATION	NEC ENGINEERING, LTD.	NTT LOGISCO INC.
EPSON SALES JAPAN CORPORATION	NIPPON COMSYS CORPORATION	NTT RESONANT INC.
GRIPEYE INC.	NIPPON TELEGRAPH AND TELEPHONE CORPORATION.	NTT-ME CORPORATION
HITACHI DOCUMENT SOLUTIONS CO., LTD.	NIPPON TELEGRAPH AND TELEPHONE EAST CORPORATION	OPTIM CORPORATION
IFORCOM TOKYO CO., LTD.	NIPPON TELEGRAPH AND TELEPHONE WEST CORPORATION	SANGIKYO CORPORATION
INFOCOM RESEARCH, INC.	NTT COM ENGINEERING CORPORATION	SEED PLANNING, INC.
JAPAN VOLUNARY LABORATORY ASSOCIATION FOR TELECOMMUNICATION EQUIPMENT	NTT COM SOLUTIONS CORPORATION	SOFTFRONT
JTBRAIN	NTT COMMUNICATIONS CORPORATION	SUMIDEN OPCOM, LTD
KDDI CORPORATION	NTT COMWARE CORPORATION	TRENDWORKS CO., LTD.
KYOWA EXEO CORPORATION	NTT DATA CORPORATION	TSUZUKI DENKI CO., LTD.
MEDIA NETWORKS INC.	NTT DOCOMO, INC.	YRP R&D PROMOTION DEPARTMENT
MIRAIT TECHNOLOGIES CORPORATION	NTT ELECTRONICS CORPORATION	
MIRAITO CORPORATION	NTT FACILITIES INC.	

Supporting Members (49 companies/organizations)

A10NETWORKS, K.K.	JAPAN DATA COMMUNICATION ASSOCIATION	RELIABILITY CENTER FOR ELECTRONIC COMPONENTS OF JAPAN
ALCATEL-LUCENT JAPAN LTD.	JAPAN ELECTRONICS AND INFORMATION TECHNOLOGY INDUSTRIES ASSOCIATION	ROHM CO., LTD.
ALPHA SYSTEMS INC.	JAPAN RECOM LTD.	SANSHEN CORPORATION
CHUO ENGINEERING CO., LTD.	JAPAN SOCIETY FOR THE PROMOTION OF MACINE INDUSTRY	SANWA COMSYS ENGINEERING CORPORATION
COMNIC CORPORATION	JAPAN TELEWORK ASSOCIATION	SENJU METAL INDUSTRY CO., LTD.
COMPUTER SOFTWARE ASSOCIATION OF JAPAN	KANTO TSUSHINYUSO K.K.	SKY PERFECT JSAT CORPORATION
DOCOMO TECHNOLOGY, INC.	MOBILE COMPUTING PROMOTION CONSORTIUM	TAIEI MANUFACTURING CO., LTD.
EXEO TECH CORPORATION	NAGAMURA MFG. CO., LTD.	TELECOM ENGINEERING CENTER
FREISTAAT BAYERN-JAPAN OFFICE	NEC COMMUNICATION SYSTEMS, LTD.	THE FOUNDATION FOR MULTIMEDIA COMMUNICATIONS
FUJIKURA LTD.	NEC NETWORK & SYSTEM INTEGRATION CORPORATION	THE INSTITUTE OF ADMINISTRATIVE INFORMATION SYSTEM
FUJITSU FIP CORPORATION	NIHON MECCS CO., LTD.	THE NEXT GENERATION IC CARD SYSTEM STUDY GROUP (NICSS)
GENBAND JAPAN GK	NIPPON CAR SOLUTIONS CO., LTD.	TOSHIBA SOLUTIONS CORPORATION
HONDA TSUSHIN KOGYO CO., LTD.	NS SOLUTIONS CORPORATION	TPS INCORPORATED
HOSHIDEN CORPORATION	NTT INFRASTRUCTURE NETWORK CORPORATION	WAT CONSULTING CO., LTD.
INFORMATION & TELECOMMUNICATION EQUIPMENT CONSTRUCTOR'S ASSOCIATION	NTT SOFTWARE CORPORATION	YOU GO LAB
JAPAN APPROVALS INSTITUTE FOR TELECOMMUNICATIONS EQUIPMENT	ORANGE JAPAN CO., LTD.	
JAPAN CABLE & TELECOMMUNICATIONS ASSOCIATION	RADIO ENGINEERING&ELECTRONICS ASSOCIATION	

International Cooperation Partners (19 organizations)

AUSTRALIAN INDUSTRY GROUP (AI)	KOREA RADIO PROMOTION ASSOCIATION (RAPA)	TELECOMMUNICATIONS TECHNOLOGY ASSOCIATION (TTA)
CANADIAN ADVANCED TECHNOLOGY ALLIANCE (CATA)	KOREA TRADE-INVESTMENT PROMOTION AGENCY (KOTRA)	TEMA EXPORT PROMOTION FORUM (TEPF)
COMMUNICATIONS ASSOCIATION OF HONG KONG (CAHK)	MOBILE MANUFACTURERS FORUM (MMF)	THE TECHNOLOGY INDUSTRIES OF FINLAND (TIF)
DIGITALEUROPE	TAIWAN ELECTRICAL AND ELECTRONIC MANUFACTURERS' ASSOCIATION (TEEMA)	VIETNAM ELECTRONIC INDUSTRIES ASSOCIATION (VEIA)
FEDERATION DES INDUSTRIES ELECTRIQUES, ELECTRONIQUES ET DE COMMUNICATION (FIEEC)	TAIWAN TRADE CENTER (TTC)	ZENTRALVERBAND ELEKTROTECHNIK UND ELEKTRONIKINDUSTRIE E.V. (ZVEI)
KOREA ASSOCIATION for ICT Promotion (KAIT)	TELECOM EQUIPMENT MANUFACTURERS' ASSOCIATION OF INDIA (TEMA)	
KOREA INDUSTRY TECHNOLOGY FOUNDATION (KOTEF)	TELECOMMUNICATIONS INDUSTRY ASSOCIATION (TIA)	