MIC
Ministry of Internal Affairs and Communications

March 25, 2009

Disclosure of Quarterly Data concerning Competition Review in the Telecommunications Business Field

Third quarter of FY2008 (as of the end of December 2008)

As a part of its competition review in the telecommunications business field, the Ministry of Internal Affairs and Communications (MIC) has compiled the share data for the third quarter of fiscal 2008 (as of the end of December 2008), and thus releases it.

Key Points

1. Fixed communications

(1) Regarding the number of contracts for subscriber telephones (total of subscription contracts for NTT subscriber telephones, telephone services that do not use NTT's local circuits, 0ABJ-IP telephones, and cable telephony), the combined share of Nippon Telegraph and Telephone East Corporation and Nippon Telegraph and Telephone West Corporation is on the decline, at 85.1% (down 0.6% from the previous quarter).

(2) In terms of the telecommunications numbers allocated to IP telephony services (0AB-J numbers and numbers with a 050 prefix), the combined share of NTT East and NTT West is 37.4% (up 1.7% from the previous quarter, or up 7.9% year-on-year), increasing its lead over SoftBank BB Corp. with 24.1% (down 1.2% from the previous quarter).

The combined share of NTT East and NTT West in the total number of calls using the 0AB-J numbers has slightly dropped to 70.9% (down 0.5% from the previous quarter), while KDDI has increased its share to 12.5% (up 0.5%).

2. Mobile communications

Regarding the number of subscriptions for cellular telephones and PHS (Personal Handy-phone System), the NTT DOCOMO and KDDI have decreased their shares at 49.1% (down 0.2% from the previous quarter) and 27.7% (down 0.2%), respectively, while SoftBank Mobile has increased its share at 18.1% (up 0.2%). Among the three mobile phone operators, SoftBank Mobile has increased its share.

3. Internet access

(1) In terms of the number of overall broadband subscriptions (a total of DSL, FTTH and cable Internet), the combined share of NTT East and NTT West is on the rise, at 49.2% (up 0.7% from the previous quarter, or up 3.4% year-on-year).

(2) In terms of the number of subscriptions for DSL services on a nationwide basis, Softbank BB accounts for 38.2% (up 0.1% from the previous quarter), stretching its lead over NTT East and NTT West with the combined share of 36.0% (down 0.3%).

(3) With respect to the number of subscriptions for FTTH (fiber to the home; with optical fiber) services, the combined share of NTT East and NTT West continues to increase, at 73.7% (up 0.3% from the previous quarter, or up 2.3% year-on-year), while power utility group carriers account for 10.4% (up 0.1%) and KDDI accounts for 5.4% (down 0.05%).

Looking into types of buildings, the combined share of NTT East and NTT West is 78.6% (down 0.02% from the previous quarter, or up 0.6% year-on-year) for single-family housing and offices. As for collective housing, their share is on the rise, at 67.1% (up 0.8% from the previous quarter, or up 4.5% year-on-year).

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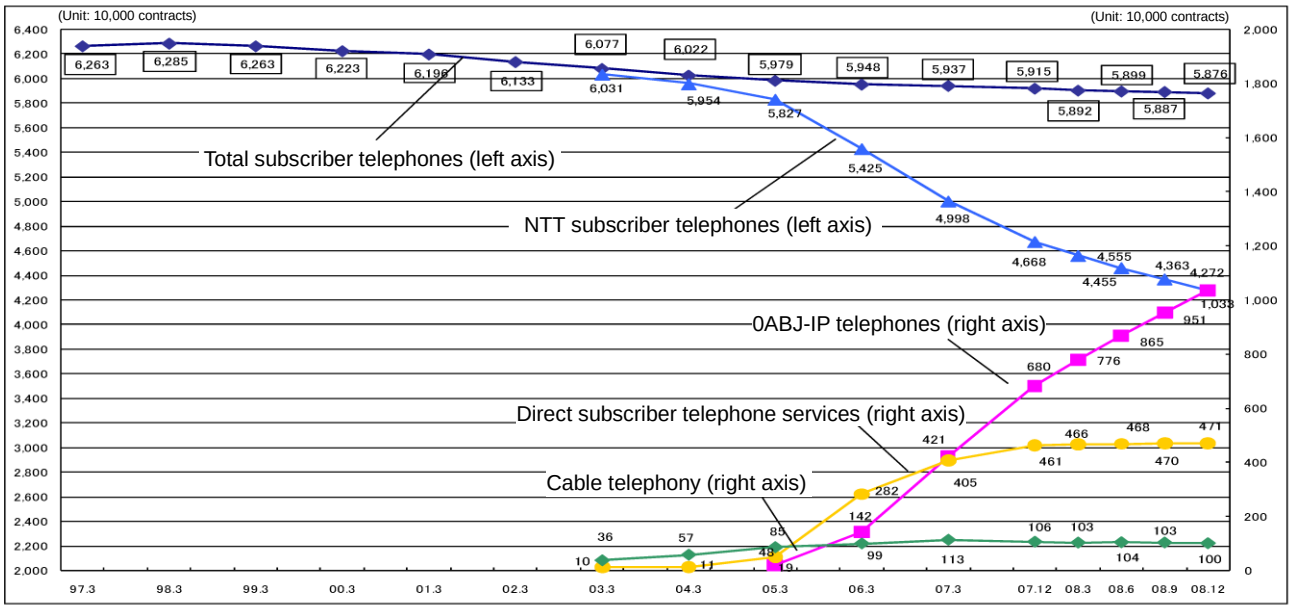
Attachment

1 Fixed Communications

(1) Subscriber Telephones

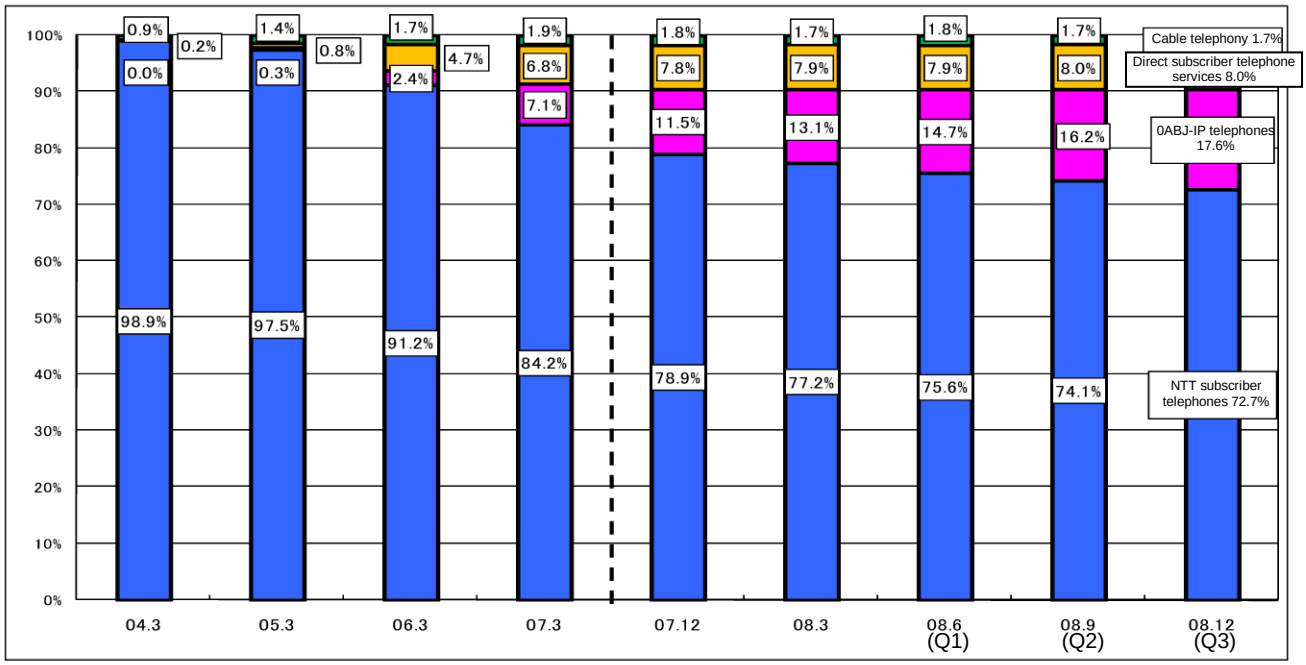
- Contracts for subscriber telephones (total of subscription contracts for NTT subscriber telephones, telephone services that do not use NTT's local circuits, 0ABJ-IP telephones, and cable telephony) numbered 58.76 million as of the end of December 2008. Among these, telephone services that do not use NTT's local circuits (direct subscriber telephone services) and 0ABJ-IP telephones are on the rise at 4.71 million (up 0.2% from the previous quarter) and 10.33 million (up 8.6%), respectively.
- The combined share of Nippon Telegraph and Telephone East Corporation and Nippon Telegraph and Telephone West Corporation (total of NTT subscriber telephones and 0ABJ-IP telephones) in the total subscription contracts for subscriber telephones amounted to 85.1% (down 0.6%, from the previous quarter), indicating a slight decline.

Contracts for Subscriber Telephones



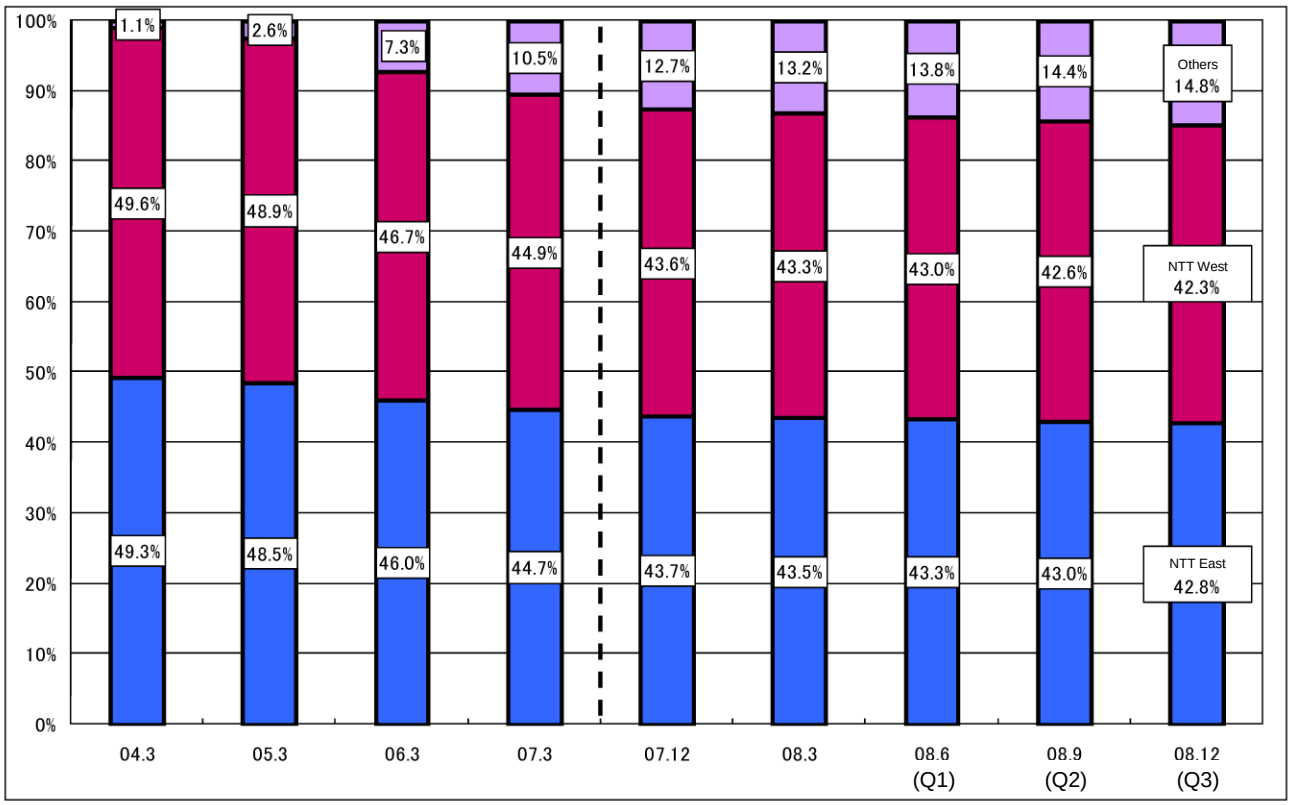
Note 1: Subscriber telephones is the term used in reference to NTT subscriber telephones (including ISDN), direct subscriber telephone services (total of conventional direct subscriber telephone services, new-type direct subscriber telephone services, and direct ISDN subscriptions), 0ABJ-IP telephones, and cable telephony.
Note 2: For 0ABJ-IP telephones, the number of the 0ABJ telephone numbers being used is treated as the number of contracts.
* While 0ABJ-IP telephones are included in the subscriber telephones, as they can be an alternative to NTT subscriber telephones, they are also included in IP telephony on Page 3 and onward.
Note 3: As figures for respective contracts are rounded, the total of the figures may differ from the actual total.

Shares of Subscriber Telephone Services



Note :As figures are rounded, the total percentage may not be 100%.

Share of NTT East and West in Total Subscriber Telephones

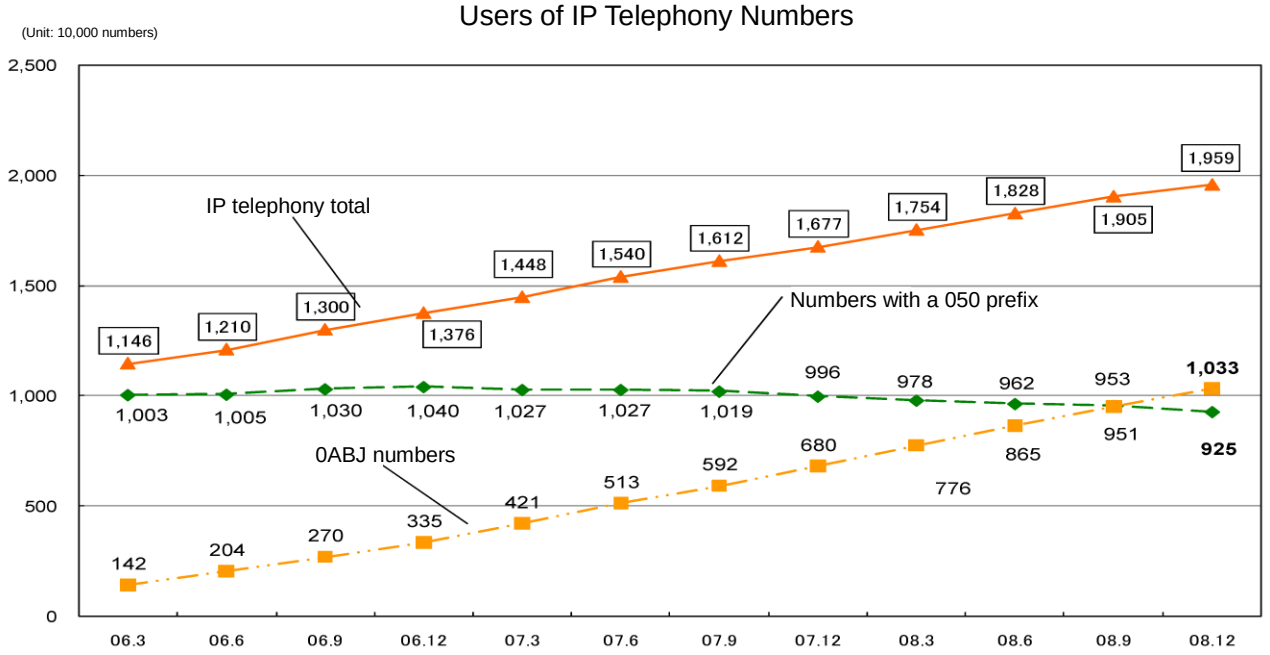


Note 1: The share of NTT East and NTT West is a total of NTT subscriber telephones (including ISDN) and 0ABJ-IP telephones.
Note 2: As figures are rounded, the total may not be 100%.

(2) IP Telephony

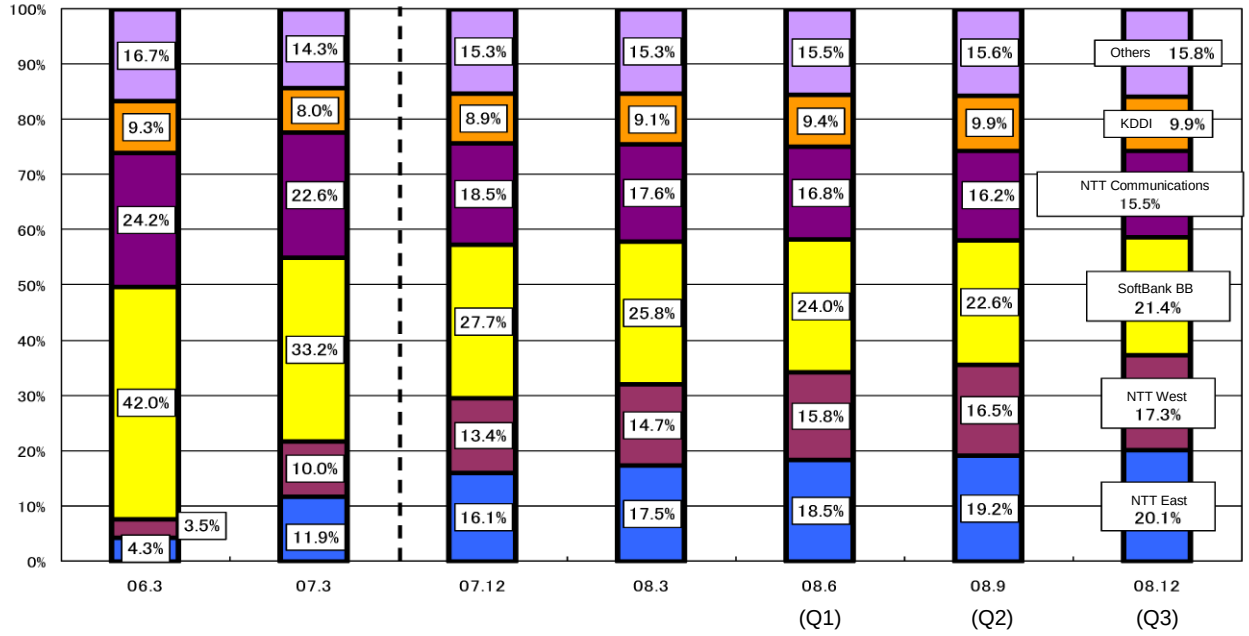
- Users of telecommunications numbers allocated to IP telephony services numbered 19.59 million (up 2.8% from the previous quarter) as of the end of December 2008. While users of 0ABJ numbers are on the rise at 10.33 million (up 8.6%), users of the numbers with a 050 prefix dropped to 9.25 million (down 2.9%).
- Regarding the share in the total number of users of IP telephony numbers, SoftBank BB and NTT Communications Corporation dipped to 21.4% (down 1.2 point from the previous quarter) and 15.5% (down 0.7 point), respectively, while the combined share of NTT East and NTT West continued to increase at 37.4% (up 1.7 point from the previous quarter, or up 7.9 point year on year).
- The combined share of NTT East and NTT West in the total number of calls using the 0ABJ numbers has dropped slightly to 70.9% (down 0.5 point from the previous quarter), while second-ranked KDDI has increased its share to 12.5% (up 0.5 point).

Users of IP Telephony Numbers



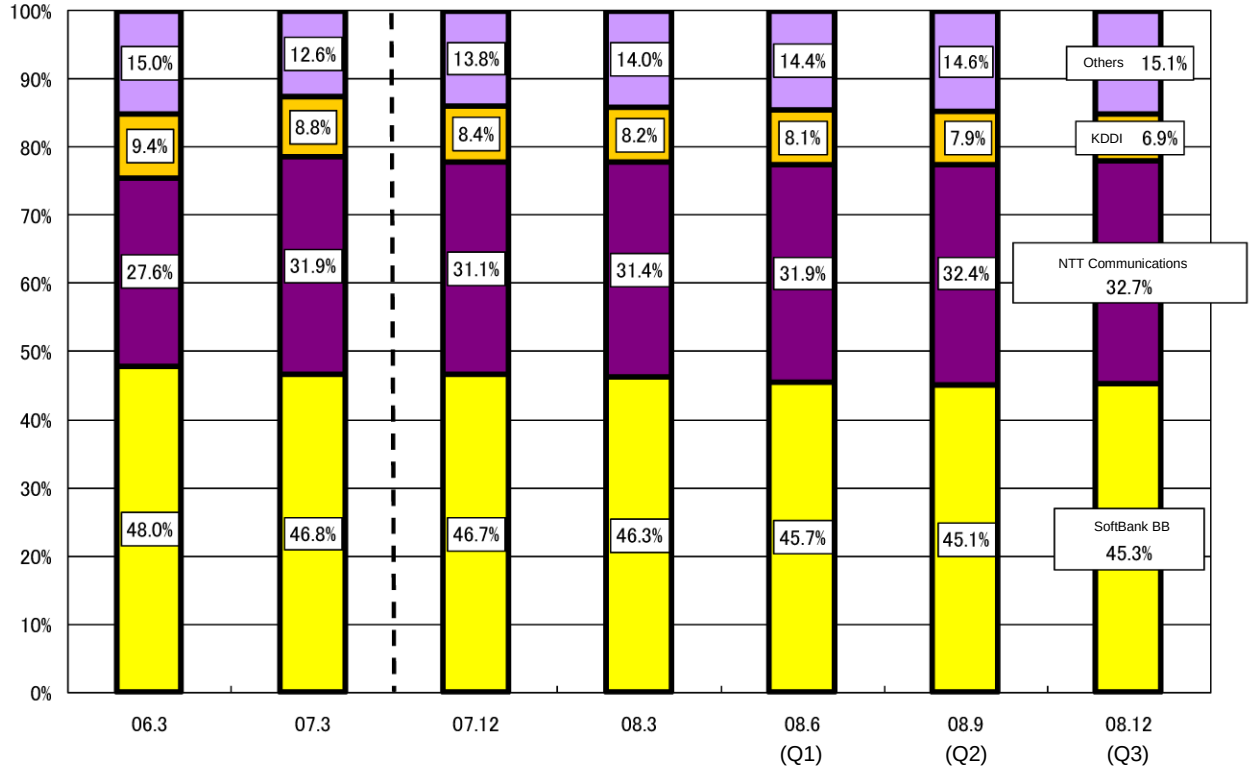
Note: As figures for respective contracts are rounded, the total of the figures may differ from the actual total.

Carrier Share of IP Telephony Numbers (Overall)



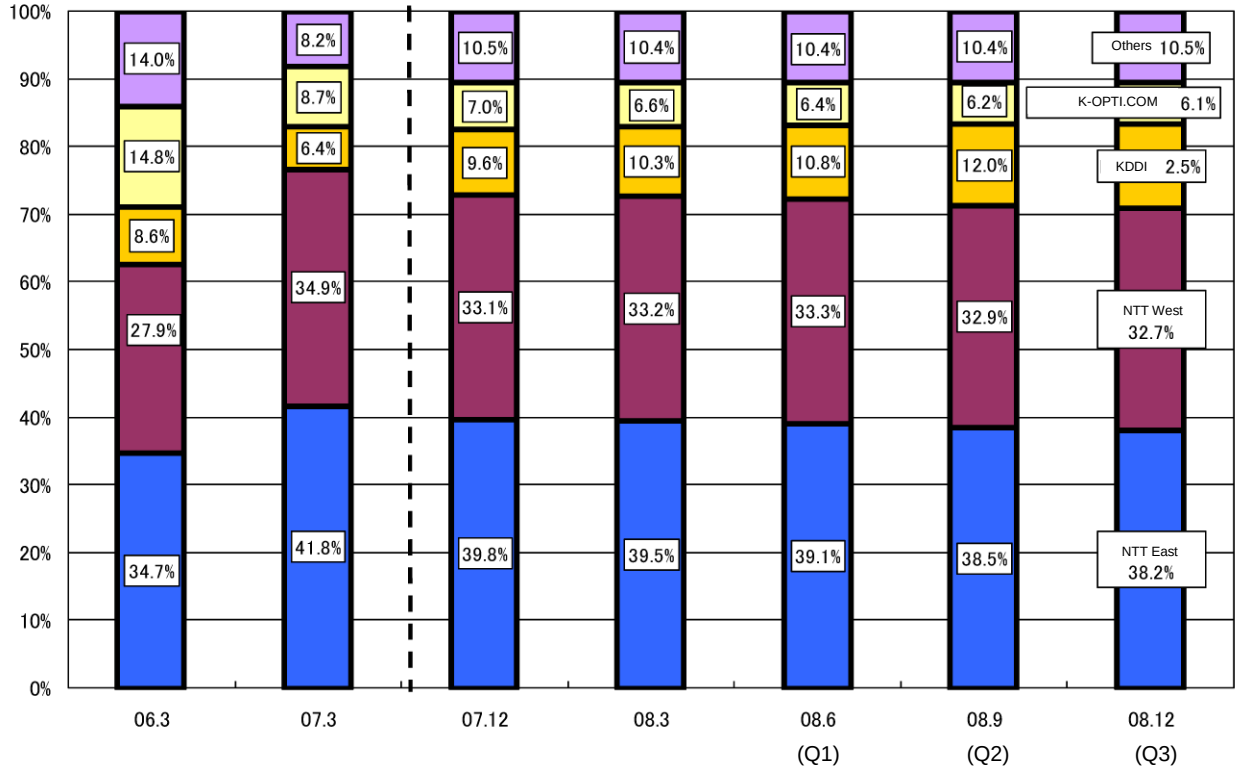
Note 1: The figures represent only the carriers to whom telecommunications numbers for IP telephony are allocated.
Note 2: As figures are rounded, the total may not be 100%.

Carrier Share of IP Telephony Numbers (Numbers with a 050 prefix)



Note 1: The figures represent only the carriers to whom telecommunications numbers for IP telephony are allocated.
Note 2: As figures are rounded, the total may not be 100%.

Carrier Share of IP Telephony Numbers (0ABJ numbers)

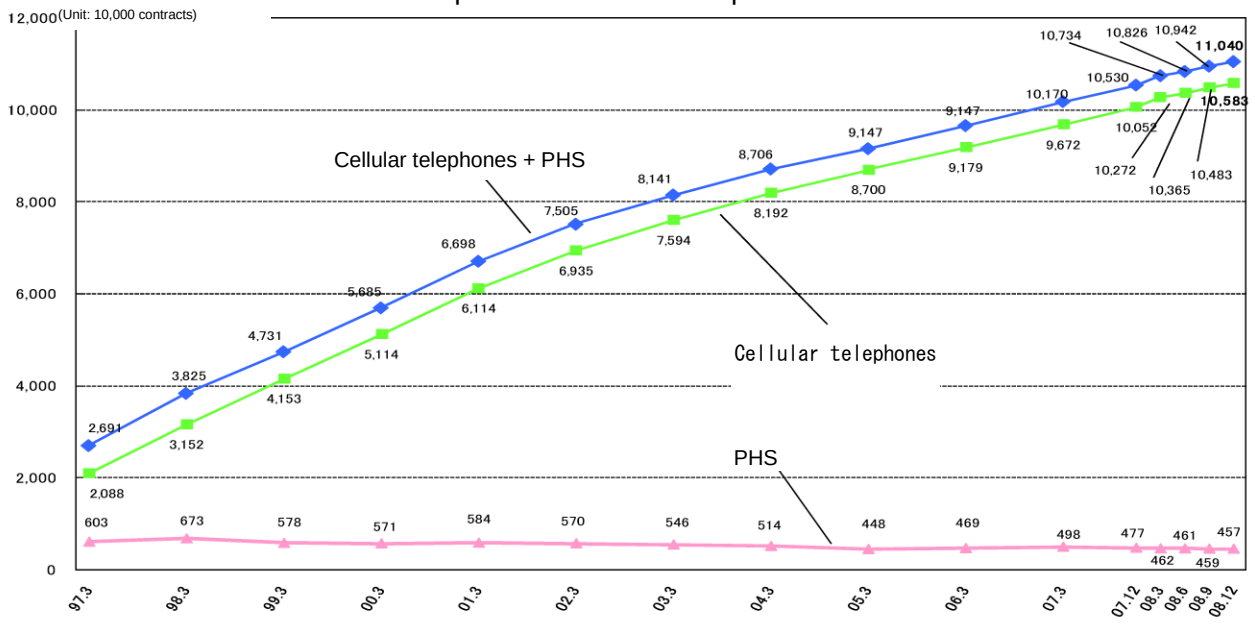


Note 1: The figures represent only the carriers to whom telecommunications numbers for IP telephony are allocated.
Note 2: As figures are rounded, the total may not be 100%.

2 Mobile Communications

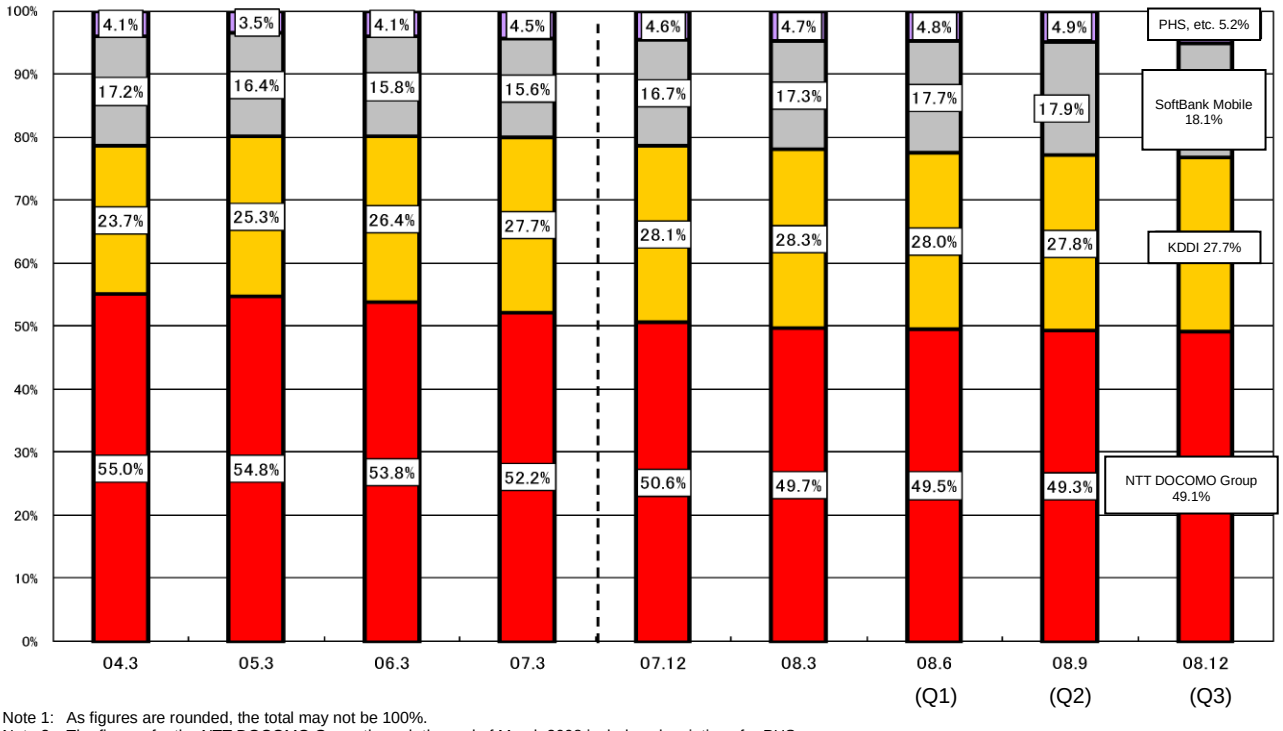
- ○ Subscriptions for cellular telephones and PHS increased slightly at 110.40 million (up 0.9% from the previous quarter) as of the end of December 2008. Subscriptions for PHS dipped to 4.57 million (down 0.4%).
- ○ The NTT DOCOMO and KDDI shares have decreased at 49.1% (down 0.2 point from the previous quarter) and 27.7% (down 0.2 point), respectively, while the SoftBank Mobile share has increased slightly at 18.1% (up 0.2 point).

Subscriptions for Cellular Telephones and PHS



Note: As figures for respective contracts are rounded, the total of the figures may differ from the actual total.

Carrier Share of Subscriptions for Cellular Telephones and PHS



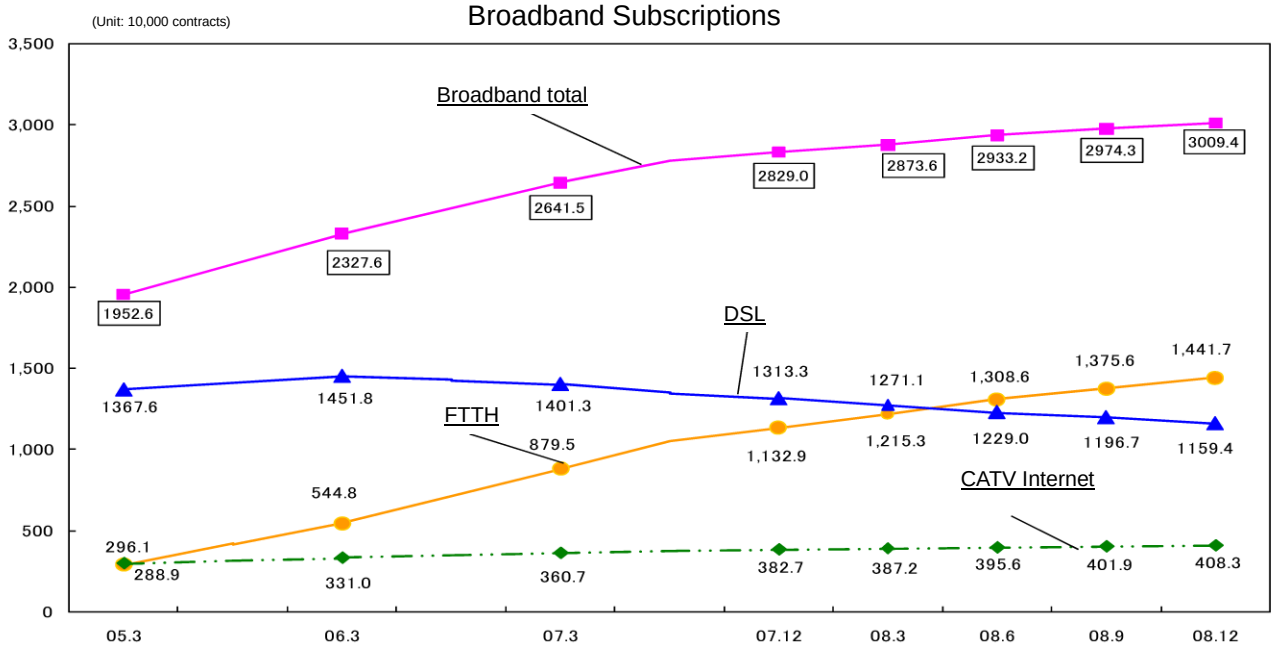
Note 1: As figures are rounded, the total may not be 100%.
Note 2: The figures for the NTT DOCOMO Group through the end of March 2008 include subscriptions for PHS.
Note 3: The Tu-Ka Group merged into KDDI (au) on October 1, 2005.
Note 4: Subscription figures for SoftBank Mobile through the end of September 2006 are those of its predecessor, Vodafone.
(Source: Statistics of the Telecommunications Carriers Association)

3 Internet Access

(1) Overall Broadband

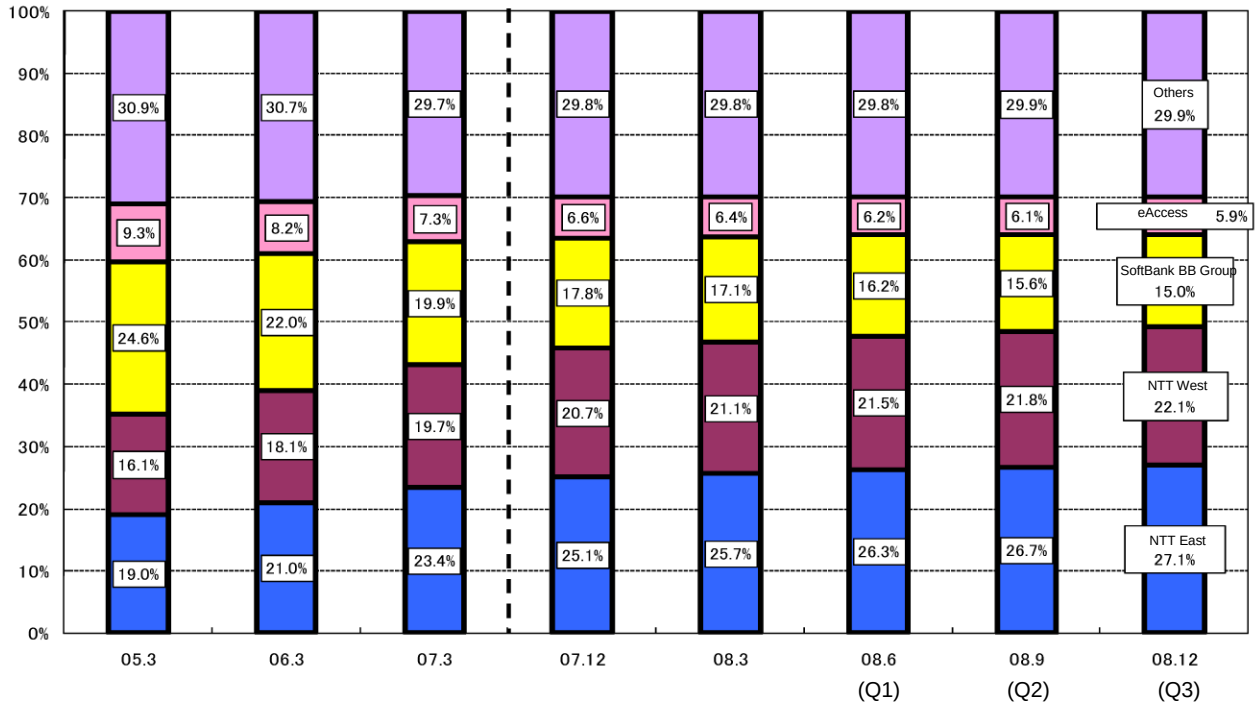
- Overall, broadband subscriptions numbered 30.094 million[1] (up 1.2% from the previous quarter) as of the end of December 2008.
- The combined share of NTT East and NTT West continued to rise at 49.2% (up 0.7 point from the previous quarter, or up 3.4 point year on year). Shares of the SoftBank Group and eAccess dipped to 15.0% (down 0.6 point from the previous quarter) and 5.9% (down 0.2 point), respectively.

Broadband Subscriptions



Note 1: The figures do not include FWA services, and thus differ from the data disclosed in the March 18, 2009, MIC press release, "Number of Broadband Service Contracts, Etc. (as of the end of December 2008)."
Note 2: As figures for respective contracts are rounded, the total of the figures may differ from the actual total.

Carrier Share of Broadband Subscriptions

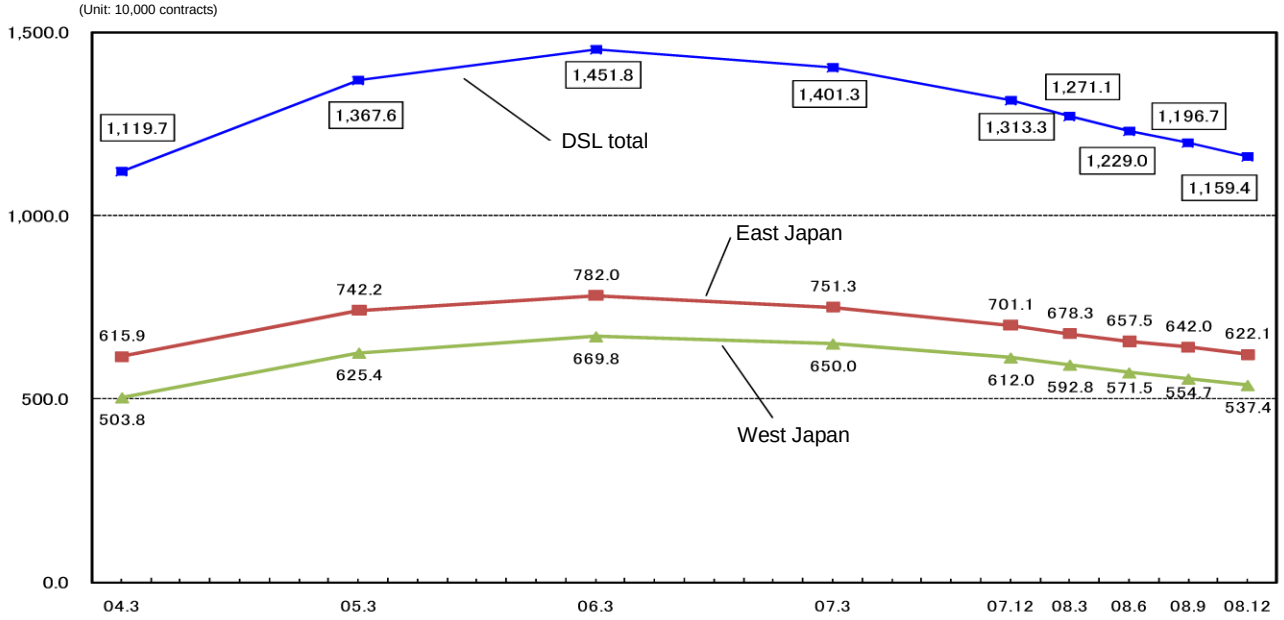


Note: As figures are rounded, the total may not be 100%.

(2) DSL

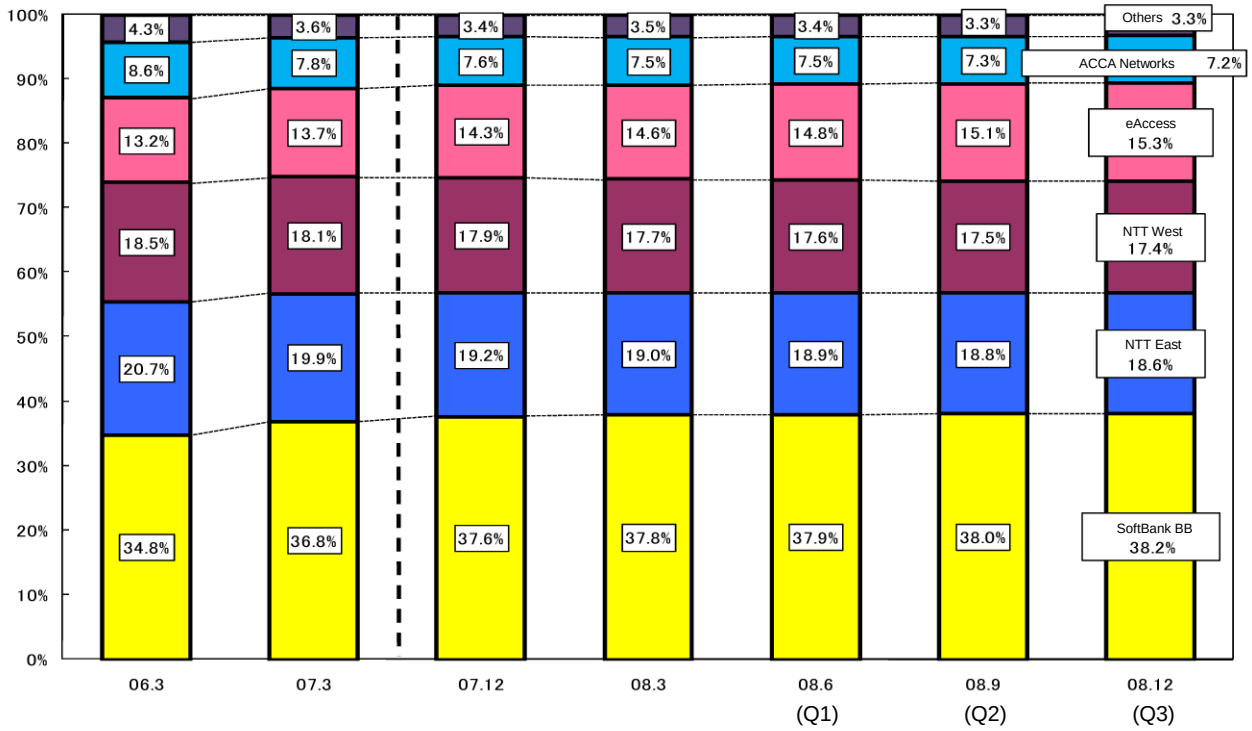
- ○ DSL subscriptions continued to fall at 11.594 million (down 3.1% from the previous quarter) as of the end of December 2008.
- ○ At the national level, SoftBank BB accounts for 38.2% (up 0.1 point from the previous quarter), stretching its lead. NTT East and NTT West hold the second largest share (the combined share of 36.0%—down 0.3 point from the previous quarter, or down 1.1 point year on year), followed by eAccess with 15.3% (up 0.3 point).
- ○ In terms of shares by region, in the East and the West Japan, SoftBank BB accounts for the largest share (at 36.0% [up 0.2 point from the previous quarter] in East Japan and at 40.6% [up 0.1point] in West Japan).

DSL Subscriptions



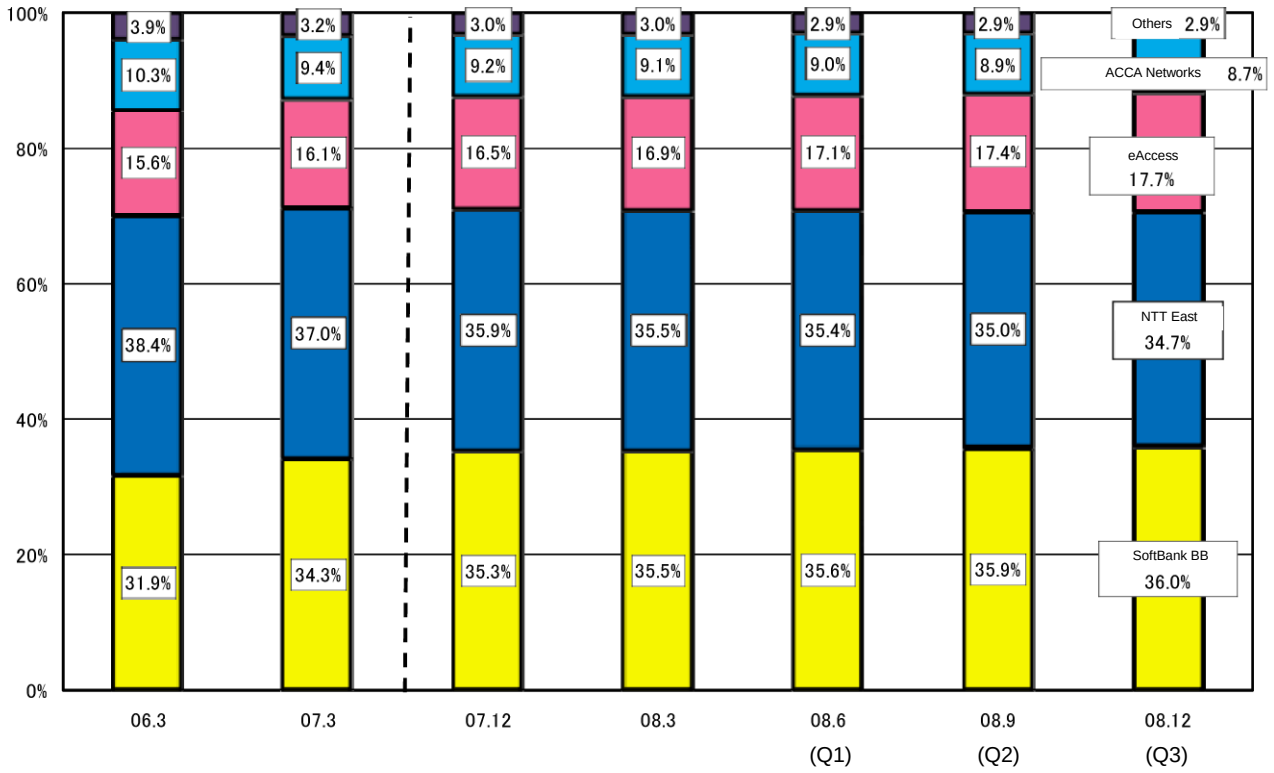
Note: As figures for respective contracts are rounded, the total of the figures may differ from the actual total.

Carrier Share of DSL Subscriptions (Nationwide)



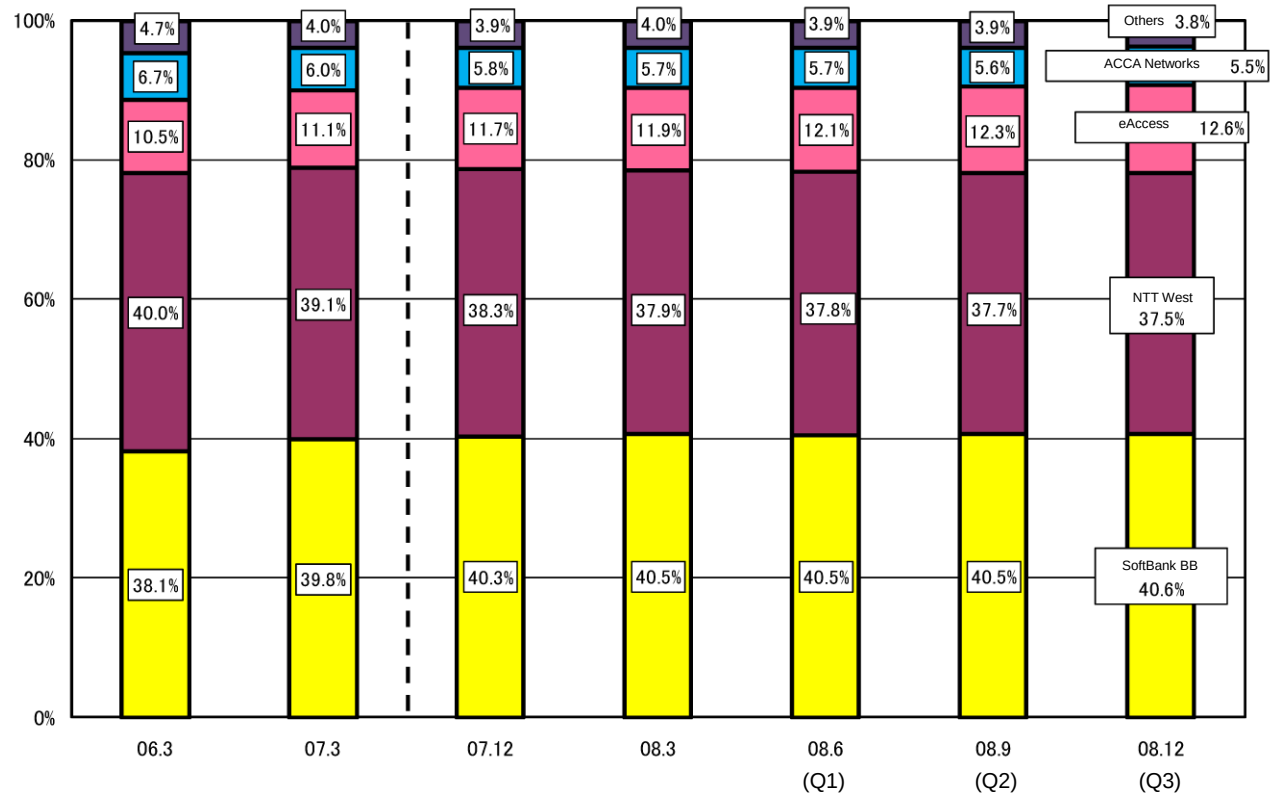
Note: As figures are rounded, the total may not be 100%.

Carrier Share of DSL Subscriptions (East Japan)



Note: As figures are rounded, the total may not be 100%.

Carrier Share of DSL Subscriptions (West Japan)

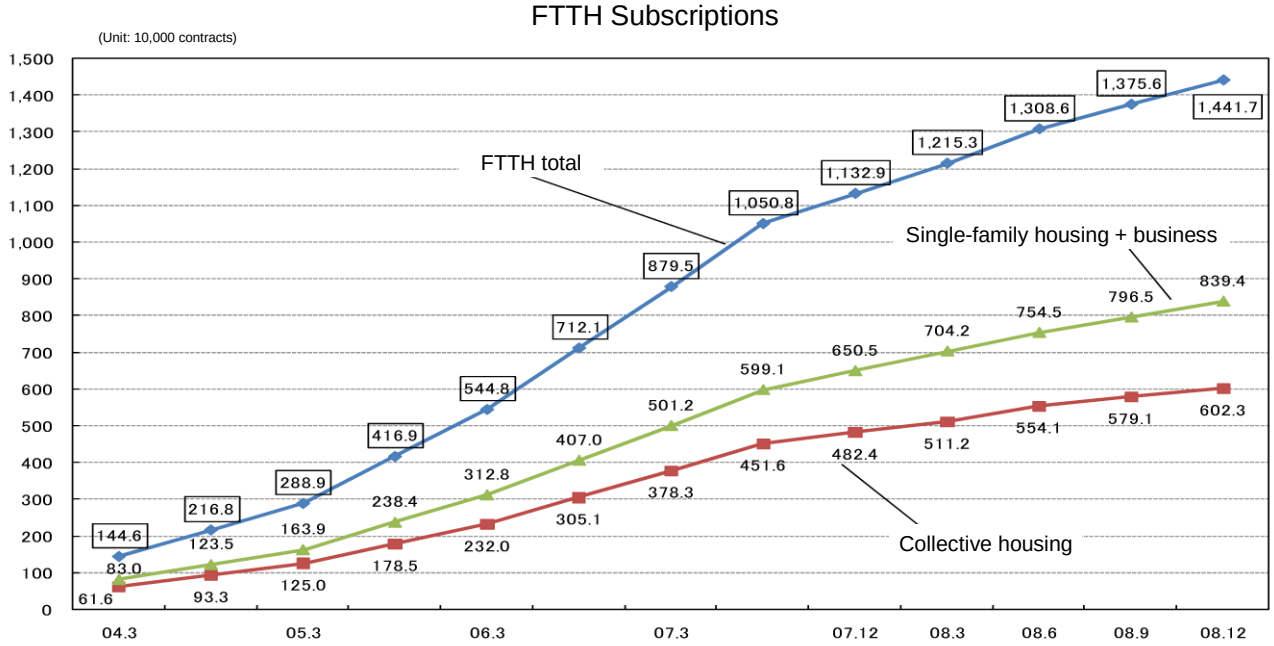


Note: As figures are rounded, the total may not be 100%.

(3) FTTH (Optical Fiber)

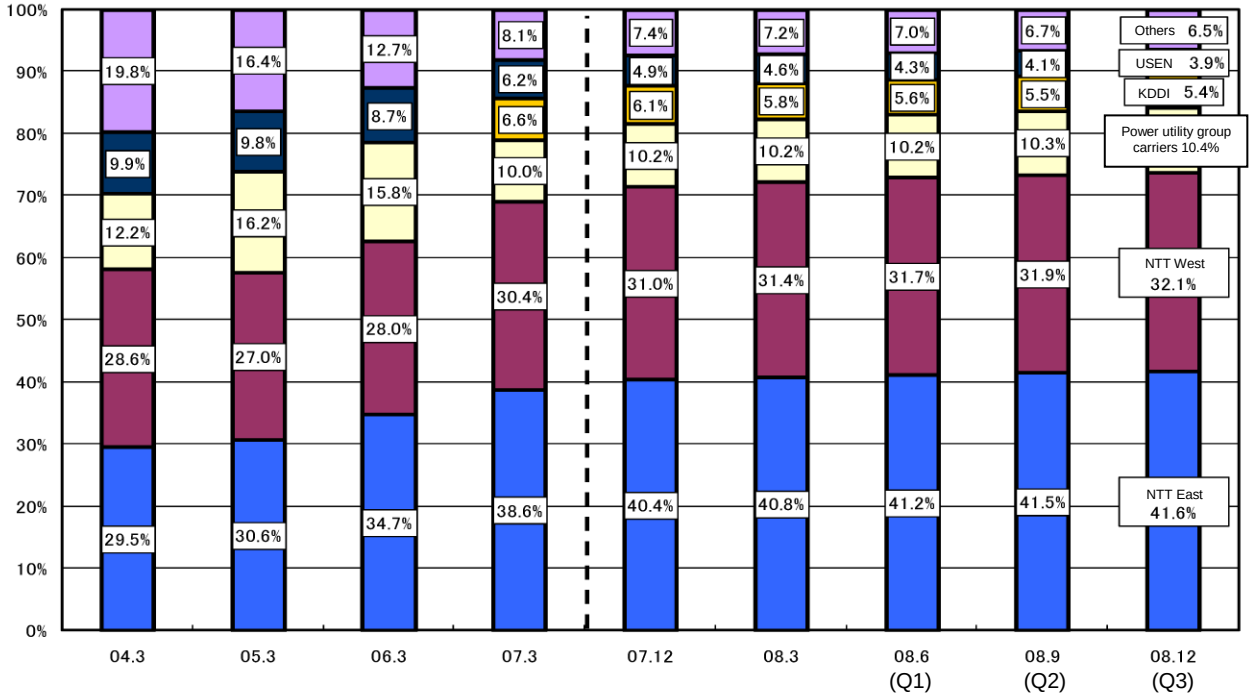
- FTTH subscriptions numbered 14.417 million (up 4.8% from the previous quarter) as of the end of December 2008.
- In total, the combined share of NTT East and NTT West continues to grow at 73.7% (up 0.3 point from the previous quarter, or up 2.3 point year on year). Meanwhile, power utility group carriers account for 10.4% (up 0.1 point from the previous quarter) and KDDI accounts for 5.4% (down 0.05 point).
- In terms of single-family housing and businesses, the combined share of NTT East and NTT West was 78.6% (down 0.02 point from the previous quarter, or up 0.6 point year on year). As for collective housing, their share also continued to grow at 67.1% (up 0.8 point from the previous quarter, or up 4.5 point year on year).

FTTH Subscriptions



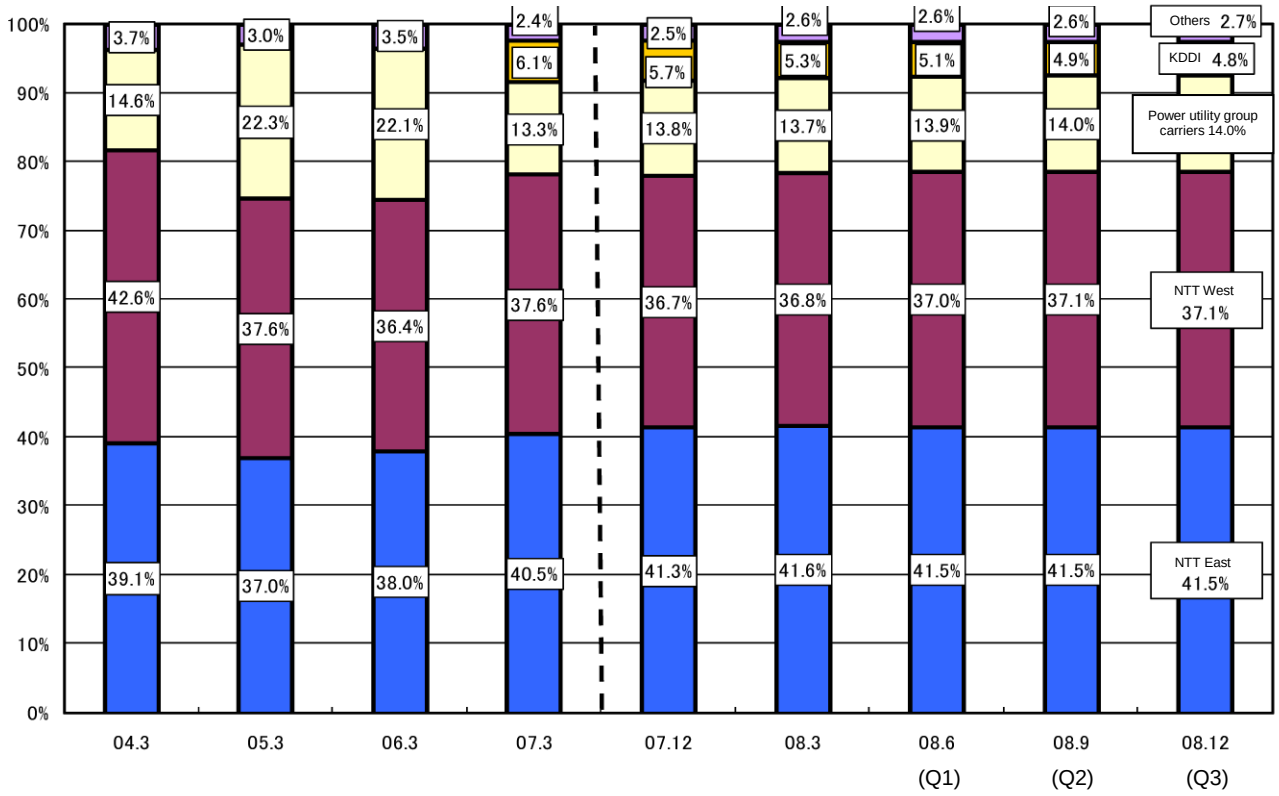
Note: As figures for respective contracts are rounded, the total of the figures may differ from the actual total.

Carrier Share of FTTH Subscriptions (Overall)



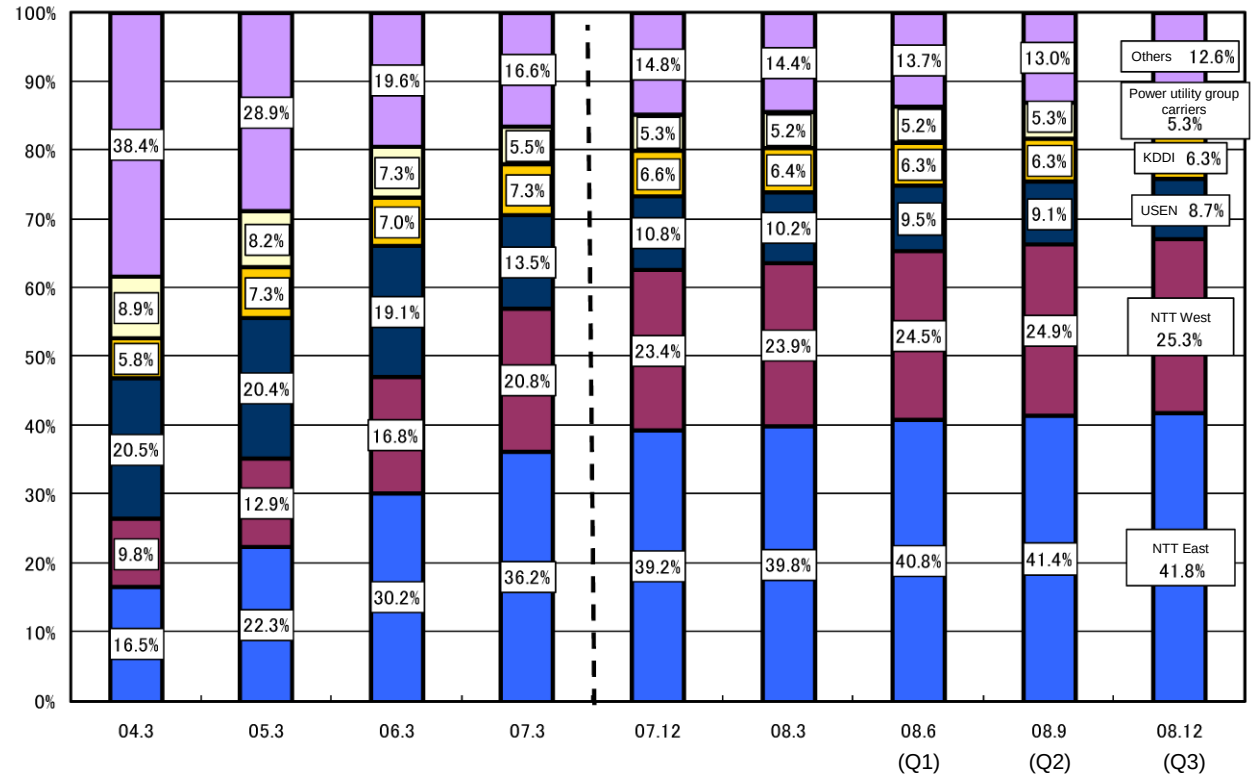
Note 1: In conjunction with KDDI's integration of the Tokyo Electric Power Company (TEPCO) FTTH business, TEPCO is not included in the power utility group carriers from the fourth quarter of FY2006 (end of March 2007) and onward. This also applies to the charts to follow.
Note 2: As figures are rounded, the total may not be 100%.

Carrier Share of FTTH Subscriptions (Single-family housing and business)



Note: As figures are rounded, the total may not be 100%.

Carrier Share of FTTH Subscriptions (Collective housing)



Note: As figures are rounded, the total may not be 100%.

[Reference]

				End of FY2005		End of FY2006		End of FY2007		FY2008					
					Year on year (%, point)		Year on year (%, point)		Year on year (%, point)	Q1 (April–June)	Quarter to quarter (%, point)	Q2 (July–September)	Quarter to quarter (%, point)	Q3 (October–December)	Quarter to quarter (%, point)
Fixed Communications	Subscriber telephones	No. of contracts (Unit: 10,000 contracts)		5,948	▲ 0.5	5,937	▲ 0.2	5,899	▲ 0.6	5,892	▲ 0.1	5,887	▲ 0.1	5,876	▲ 0.2
		Share (%)	NTT East	46.0	▲ 2.5	44.7	▲ 1.3	43.5	▲ 1.2	43.3	▲ 0.2	43.0	▲ 0.3	42.8	▲ 0.2
			NTT West	46.7	▲ 2.2	44.9	▲ 1.8	43.3	▲ 1.6	43.0	▲ 0.3	42.6	▲ 0.3	42.3	▲ 0.4
			Others	7.3	4.7	10.4	3.1	13.2	2.8	13.8	0.5	14.4	0.6	14.8	0.5
	IP Telephony	Users of IP telephony numbers (Unit: 10,000 numbers)	Numbers with a 050 prefix	1,003	23.6	1,027	2.4	978	▲ 4.8	962	▲ 1.6	953	▲ 1.0	925	▲ 2.9
			0ABJ numbers	142	661.5	421	195.4	776	84.4	865	11.6	951	9.9	1,033	8.6
		Share (%) (Overall)	SoftBank BB	42.0	▲ 12.4	33.2	▲ 8.8	25.8	▲ 7.4	24.0	▲ 1.8	22.6	▲ 1.4	21.4	▲ 1.2
			NTT East	4.3	4.2	11.9	7.6	17.5	5.6	18.5	1.1	19.2	0.7	20.1	0.9
			NTT West	3.5	3.5	10.0	6.5	14.7	4.7	15.8	1.1	16.5	0.7	17.3	0.8
			NTT Communications	24.2	5.1	22.6	▲ 1.6	17.6	▲ 5.0	16.8	▲ 0.8	16.2	▲ 0.6	15.5	▲ 0.7
			KDDI	9.3	▲ 2.5	8.0	▲ 1.3	9.1	1.1	9.4	0.2	9.9	0.6	9.9	▲ 0.0
			Others	16.7	2.0	14.3	▲ 2.4	15.3	1.0	15.5	0.2	15.6	0.1	15.8	0.2
		Share (%) (Numbers with a 050 prefix)	SoftBank BB	48.0	▲ 7.6	46.8	▲ 1.2	46.3	▲ 0.5	45.7	▲ 0.7	45.1	▲ 0.5	45.3	0.1
			NTT Communications	27.6	8.1	31.9	4.3	31.4	▲ 0.5	31.9	0.4	32.4	0.5	32.7	0.4
			KDDI	9.4	▲ 2.0	8.8	▲ 0.6	8.2	▲ 0.6	8.1	▲ 0.2	7.9	▲ 0.2	6.9	▲ 0.9
			Others	15.0	1.6	12.6	▲ 2.4	14.0	1.4	14.4	0.4	14.6	0.2	15.1	0.4
		Share (%) (0ABJ numbers)	NTT East	34.7	31.9	41.8	7.1	39.5	▲ 2.3	39.1	▲ 0.3	38.5	▲ 0.7	38.2	▲ 0.3
			NTT West	27.9	27.9	34.9	7.0	33.2	▲ 1.7	33.3	0.1	32.9	▲ 0.3	32.7	▲ 0.2
			KDDI	8.6	▲ 18.4	6.4	▲ 2.2	10.3	3.9	10.8	0.5	12.0	1.2	12.5	0.5
			K-OPTI.COM	14.8	▲ 31.4	8.7	▲ 6.1	6.6	▲ 2.1	6.4	▲ 0.2	6.2	▲ 0.2	6.1	▲ 0.1
			Others	14.0	▲ 10.0	8.2	▲ 5.8	10.4	2.2	10.4	▲ 0.0	10.4	0.0	10.5	0.1
Mobile Communications	Cellular telephones + PHS	No. of contracts (Unit: 10,000 contracts)		9,648	5.5	10,170	5.4	10,734	5.5	10,826	0.9	10,942	1.1	11,040	0.9
		Share (%)	NTT DOCOMO Group	53.8	▲ 1.0	52.2	▲ 1.6	49.7	▲ 2.5	49.5	▲ 0.2	49.3	▲ 0.2	49.1	▲ 0.2
			KDDI (incl. Tu-Ka)	26.4	1.1	27.7	1.3	28.3	0.6	28.0	▲ 0.3	27.8	▲ 0.2	27.7	▲ 0.2
			SoftBank Mobile	15.8	▲ 0.6	15.6	▲ 0.2	17.3	1.7	17.7	0.3	17.9	0.3	18.1	0.2
			PHS, etc.	4.1	0.6	4.5	0.4	4.7	0.2	4.8	0.1	4.9	0.1	5.2	0.2
Internet Access	Broadband	No. of contracts (Unit: 10,000 contracts)		2,327.6	19.2	2,641.5	13.5	2,873.6	8.8	2933.2	2.1	2974.3	1.4	3009.4	1.2
		Share (%) (Nationwide)	NTT East	21.0	2.0	23.4	2.4	25.7	2.3	26.3	0.7	26.7	0.4	27.1	0.4
			NTT West	18.1	2.0	19.7	1.6	21.1	1.4	21.5	0.4	21.8	0.3	22.1	0.3
			Softbank Group	22.0	▲ 2.6	19.9	▲ 2.1	17.0	▲ 2.9	16.2	▲ 0.9	15.6	▲ 0.6	15.0	▲ 0.6
			eAccess	8.2	▲ 1.1	7.3	▲ 0.9	6.4	▲ 0.9	6.2	▲ 0.2	6.1	▲ 0.1	5.9	▲ 0.2
			Others	30.7	▲ 0.2	29.7	▲ 1.0	29.8	0.1	29.8	0.0	29.9	0.1	29.9	0.1
	DSL	No. of contracts (Unit: 10,000 contracts)		1,451.8	6.2	1,401.3	▲ 3.5	1,271.1	▲ 9.3	1229.0	▲ 3.3	1196.7	▲ 2.6	1159.4	▲ 3.1
		Share (%) (Nationwide)	SoftBank BB	34.8	▲ 0.1	36.8	2.0	37.8	1.0	37.9	0.0	38.0	0.2	38.2	0.1
			NTT East	20.7	0.0	19.9	▲ 0.8	19.0	▲ 0.9	18.9	▲ 0.0	18.8	▲ 0.1	18.6	▲ 0.1
			NTT West	18.5	1.1	18.1	▲ 0.4	17.7	▲ 0.4	17.6	▲ 0.1	17.5	▲ 0.1	17.4	▲ 0.1
			eAccess	13.2	▲ 0.1	13.7	0.5	14.6	0.9	14.8	0.3	15.1	0.2	15.3	0.3
			ACCA Networks	8.6	▲ 0.8	7.8	▲ 0.8	7.5	▲ 0.3	7.5	▲ 0.1	7.3	▲ 0.1	7.2	▲ 0.1
			Others	4.3	0.0	3.6	▲ 0.7	3.5	▲ 0.1	3.4	▲ 0.1	3.3	▲ 0.0	3.3	▲ 0.1
		Share (%) (East Japan)	SoftBank BB	31.9	0.5	34.3	2.4	35.5	1.2	35.6	0.1	35.9	0.3	36.0	0.2
			NTT East	38.4	0.2	37.0	▲ 1.4	35.5	▲ 1.5	35.4	▲ 0.2	35.0	▲ 0.4	34.7	▲ 0.3
			eAccess	15.6	0.2	16.1	0.5	16.9	0.8	17.1	0.2	17.4	0.3	17.7	0.3
			ACCA Networks	10.3	▲ 0.7	9.4	▲ 0.9	9.1	▲ 0.3	9.0	▲ 0.1	8.9	▲ 0.1	8.7	▲ 0.1
			Others	3.9	0.0	3.2	▲ 0.7	3.0	▲ 0.2	2.9	▲ 0.1	2.9	▲ 0.0	2.9	▲ 0.0
		Share (%) (West Japan)	SoftBank BB	38.1	▲ 1.0	39.8	1.7	40.5	0.7	40.5	▲ 0.1	40.5	0.1	40.6	0.1
			NTT West	40.0	2.0	39.1	▲ 0.9	37.9	▲ 1.2	37.8	▲ 0.1	37.7	▲ 0.2	37.5	▲ 0.1
			eAccess	10.5	▲ 0.3	11.1	0.6	11.9	0.8	12.1	0.3	12.3	0.2	12.6	0.3
			ACCA Networks	6.7	▲ 0.7	6.0	▲ 0.7	5.7	▲ 0.3	5.7	▲ 0.0	5.6	▲ 0.1	5.5	▲ 0.1
			Others	4.7	0.0	4.0	▲ 0.7	4.0	0.0	3.9	▲ 0.1	3.9	▲ 0.0	3.8	▲ 0.1
	FTTH	No. of contracts (Unit: 10,000 contracts)		544.8	88.6	879.5	61.4	1,215.3	38.2	1308.6	7.7	1375.6	5.1	1441.7	4.8
		Share (%) (Overall)	NTT East	34.7	4.1	38.6	3.9	40.8	2.2	41.2	0.4	41.5	0.2	41.6	0.2
			NTT West	28.0	1.0	30.4	2.4	31.4	1.0	31.7	0.3	31.9	0.2	32.1	0.2
			Power utility group carriers	15.8	▲ 0.4	10.0	▲ 5.8	10.2	0.2	10.2	0.0	10.3	0.1	10.4	0.1
			KDDI	–	–	6.6	–	5.8	▲ 0.8	5.6	▲ 0.2	5.5	▲ 0.1	5.4	▲ 0.0
			USEN	8.7	▲ 1.1	6.2	▲ 2.5	4.6	▲ 1.6	4.3	▲ 0.3	4.1	▲ 0.2	3.9	▲ 0.2
			Others	12.7	▲ 3.7	8.1	▲ 4.6	7.3	▲ 0.8	7.0	▲ 0.2	6.7	▲ 0.3	6.5	▲ 0.2
		Share (%) (Single-family housing + business)	NTT East	38.0	1.0	40.5	2.5	41.6	1.1	41.5	▲ 0.1	41.5	▲ 0.0	41.5	▲ 0.0
			NTT West	36.4	▲ 1.2	37.6	1.2	36.8	▲ 0.8	37.0	0.2	37.1	0.1	37.1	0.0
			Power utility group carriers	22.1	▲ 0.2	13.3	▲ 8.8	13.7	0.4	13.9	0.2	14.0	0.1	14.0	0.0
			KDDI	–	–	6.1	–	5.3	▲ 0.8	5.1	▲ 0.2	4.9	▲ 0.2	4.8	▲ 0.1
			Others	3.5	0.5	2.4	▲ 1.1	2.6	0.2	2.6	0.0	2.6	▲ 0.0	2.7	0.1
		Share (%) (Collective housing)	NTT East	30.2	7.9	36.2	6.0	39.8	3.6	40.8	1.1	41.4	0.5	41.8	0.4
			NTT West	16.8	3.9	20.8	4.0	23.9	3.1	24.5	0.6	24.9	0.4	25.3	0.4
			USEN	19.1	▲ 1.3	13.5	▲ 5.6	10.2	▲ 3.3	9.5	▲ 0.7	9.1	▲ 0.4	8.7	▲ 0.4
			KDDI	7.0	▲ 0.3	7.3	0.3	6.4	▲ 0.9	6.3	▲ 0.1	6.3	▲ 0.0	6.3	0.0
			Power utility group carriers	7.3	▲ 0.9	5.5	▲ 1.8	5.2	▲ 0.3	5.2	▲ 0.0	5.3	0.1	5.3	0.1
			Others	19.6	▲ 9.3	16.7	▲ 2.9	14.4	▲ 2.3	13.7	▲ 0.8	13.0	▲ 0.7	12.6	▲ 0.5

Note 1: Where "–" appears instead of a figure, data is not available.
Note 2: For IP telephony, the index has changed from the number of telecommunications numbers designated to the number of telecommunications numbers used.
Note 3: Some figures were corrected and underlined.