1. Mobile communications

Attachment

(1) Mobile Communications

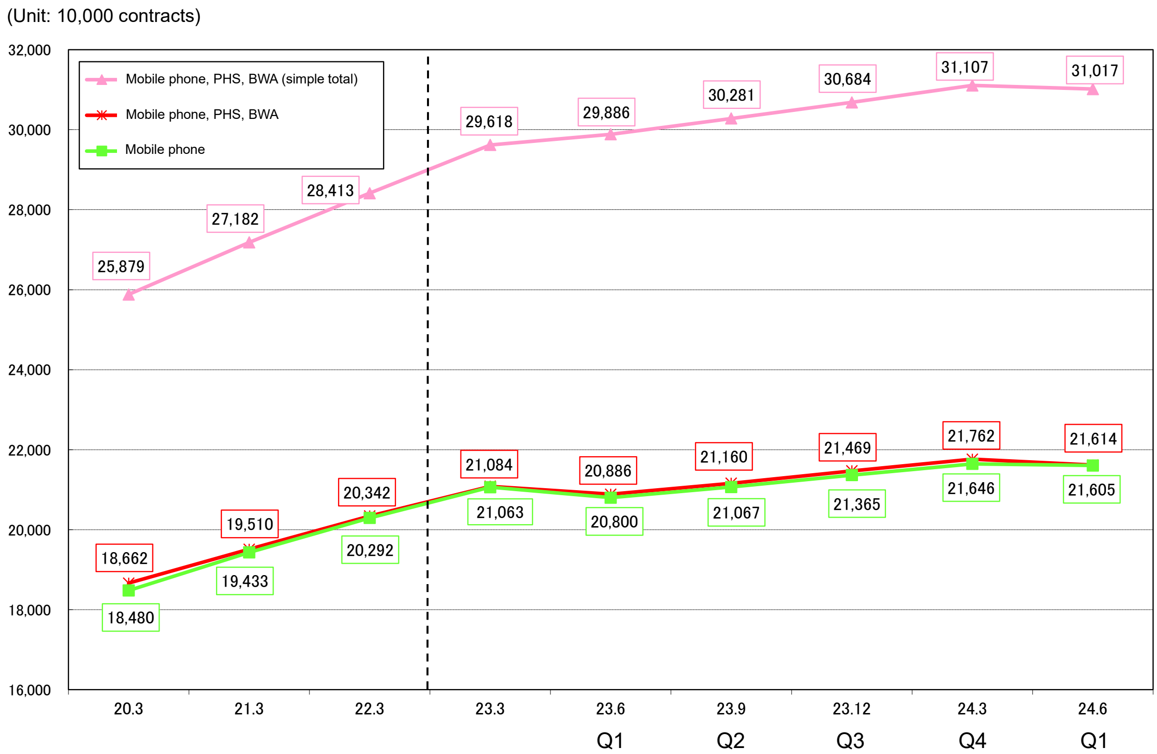
○ **<u>The number of mobile communications contracts</u> was 216.14 million** (down 0.7% from the previous quarter and up 3.5% from the same quarter of the previous year: a simple total of 310.17 million), and **<u>the number of mobile phone contracts</u> was 216.05 million** (down 0.2% from the previous quarter and up 3.9% from the same quarter of the previous year).

○ **<u>The number of 3.9–4th generation (3.9–4G) mobile phone (LTE) contracts (simple total)</u> was 117.03 million** (down 2.5% from the previous quarter and down 7.4% from the same quarter of the previous year, accounting for 52.8% of all mobile phone contracts), and **<u>the number of 5th generation (5G) mobile phone contracts (simple total)</u> was 98.17 million** (up 6.3% from the previous quarter and up 31.3% from the same quarter of the previous year). **<u>The number of BWA contracts (simple total)</u> was 88.37 million** (up 0.5% from the previous quarter and up 4.0% from the same quarter of the previous year).

○ **In terms of the share of mobile communications contracts by operator, <u>NTT Docomo</u> accounted for 35.0%** (up 0.2 points from the previous quarter and down 0.8 points from the same quarter of the previous year; or 41.1% when including those related to services providing to MVNOs), **<u>KDDI Group</u> for 27.5%** (up 0.3 points from the previous quarter and unchanged from the same quarter of the previous year; or 31.6% when including those related to services providing to MVNOs), **<u>SoftBank</u> for 19.3%** (down 0.1 points from the previous quarter and down 0.3 points from the same quarter of the previous year; or 23.8% when including those related to services providing to MVNOs), **<u>Rakuten Mobile</u> for 3.0%** (up 0.2 points from the previous quarter and up 0.7 points from the same quarter of the previous year; or 3.5% when including those related to services providing to MVNOs), and **MVNOs for 15.2%** (down 0.6 points from the previous quarter and up 0.4 points from the same quarter of the previous year).

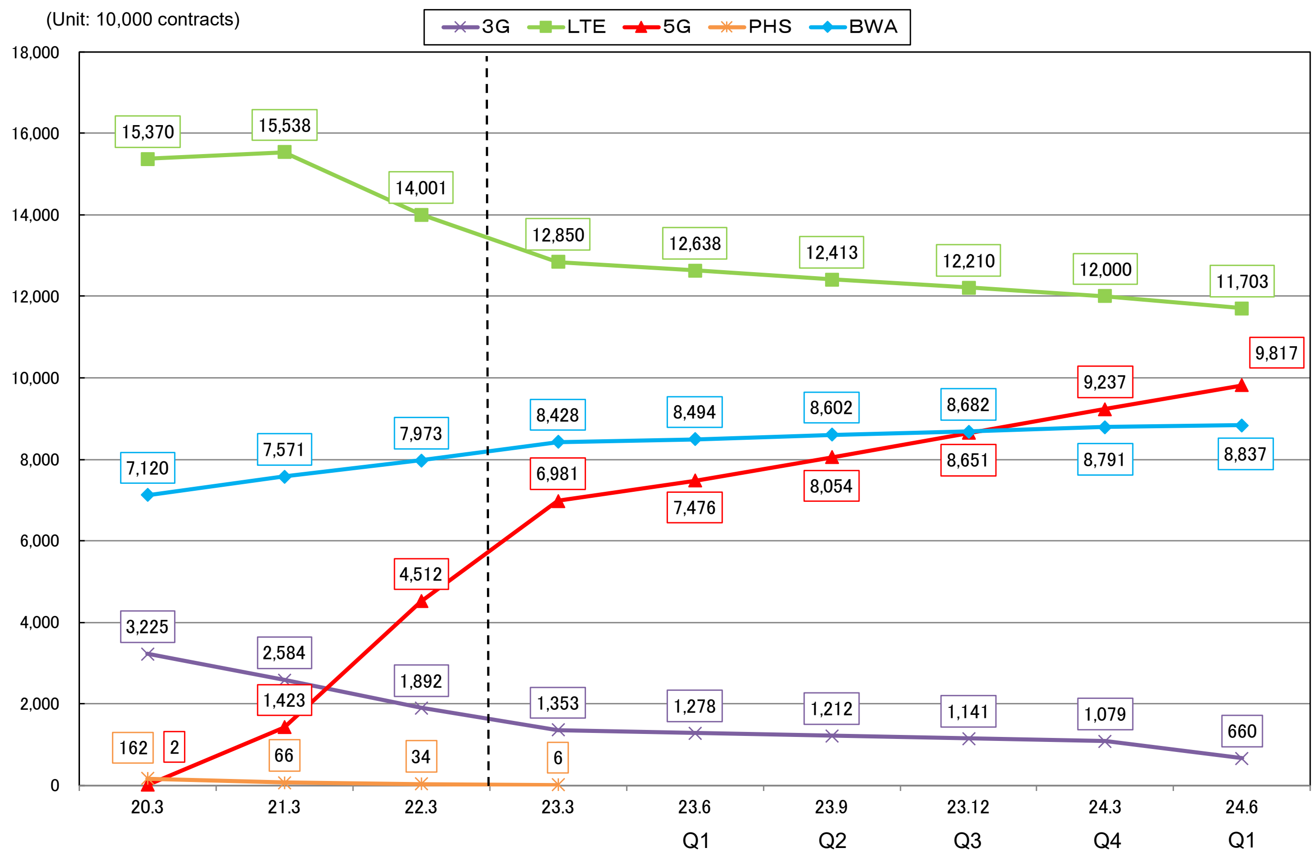
Note 1: Since figures are rounded to the nearest unit, the total figures, the sum of the breakdowns, as well as the rate of increases and decreases calculated from the figures in the charts and tables and the rate of increases and decreases displayed may not match. The same applies below.
Note 2: The number of mobile communications contracts is the total for mobile phones, PHS and BWA. For PHS, the number is up to FY2022 Q4. The same applies below.
Note 3: Unless otherwise specified, the number of mobile communications contracts is the result after intra-group transaction adjustments and does not include the number of contracts for wireless fixed broadband, mobile network fixed-line telephones and wireless fixed-line telephones provided by mobile phone or BWA. (The figures indicated as "simple total" are those which are not subject to intra-group transaction adjustments and include the number of contracts for wireless fixed broadband, mobile network fixed-line telephones and wireless fixed-line telephones provided by mobile phones or BWA.)
Note 4: The number of mobile phone contracts is the total of those for 3rd generation, 3.9–4th generation and 5th generation mobile phones.
Note 5: Rakuten Mobile share is its share as an MNO.

Changes in the number of mobile communications contracts



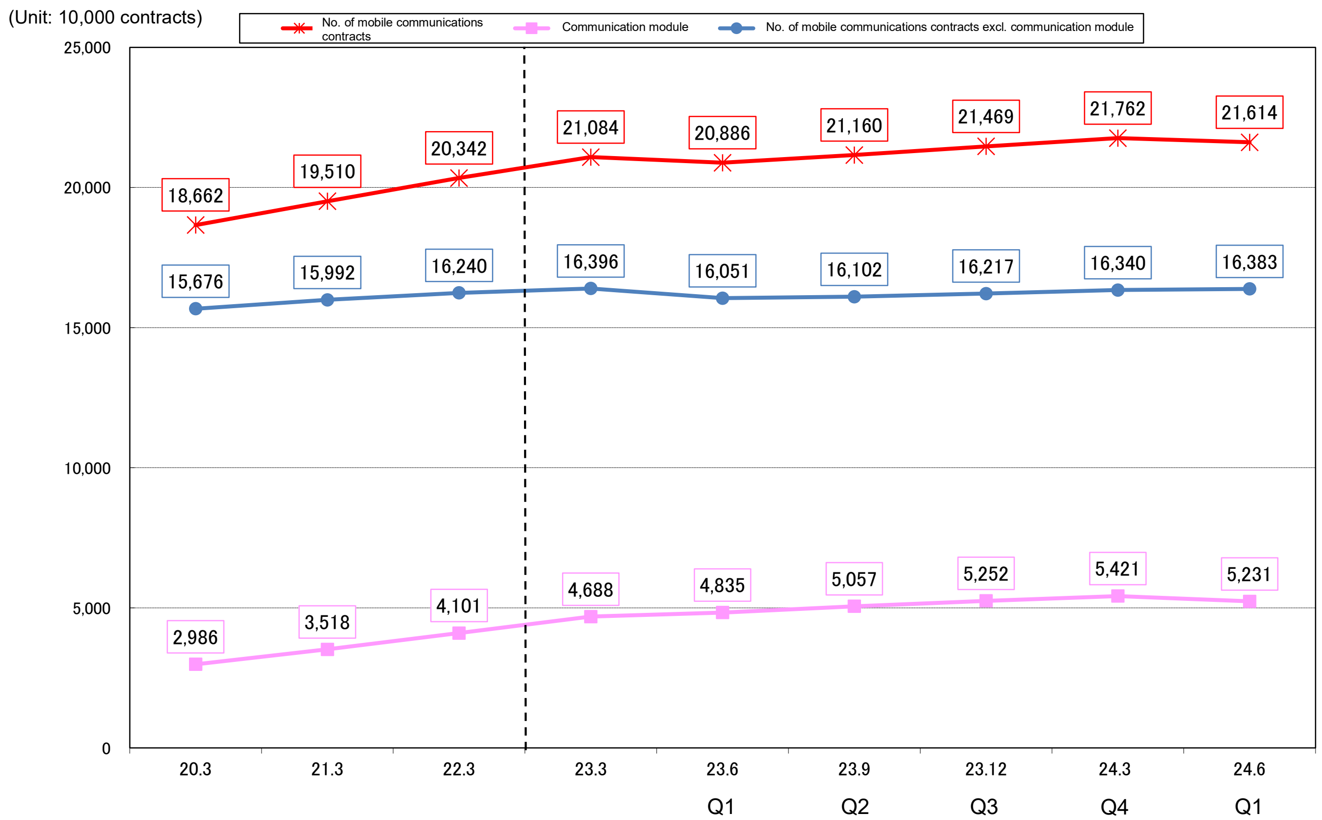
Note: Before FY2022 4Q (March 2023), the number of contracts for wireless fixed broadband provided by mobile phone or BWA was included in the number of contracts for “Mobile phone, PHS, BWA” and “Mobile phone.” The same applies hereafter.

3G, LTE, 5G, PHS and BWA contracts (simple total)



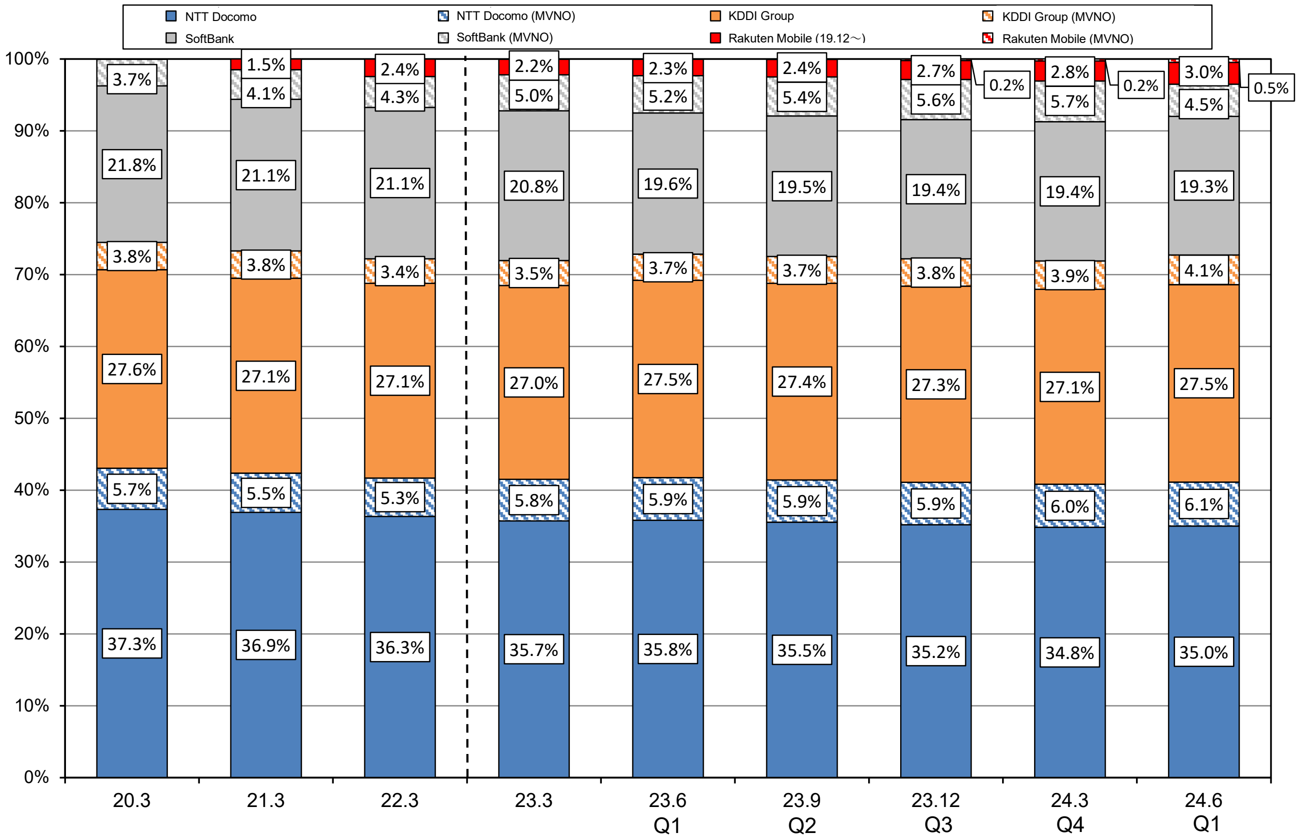
Note 1: The number of LTE contracts includes those for mobile phones available with both 3G and LTE.
Note 2: The number of 5G contracts includes those for mobile phones available with both LTE and 5G.

[Reference] Changes in the number of communication module contracts



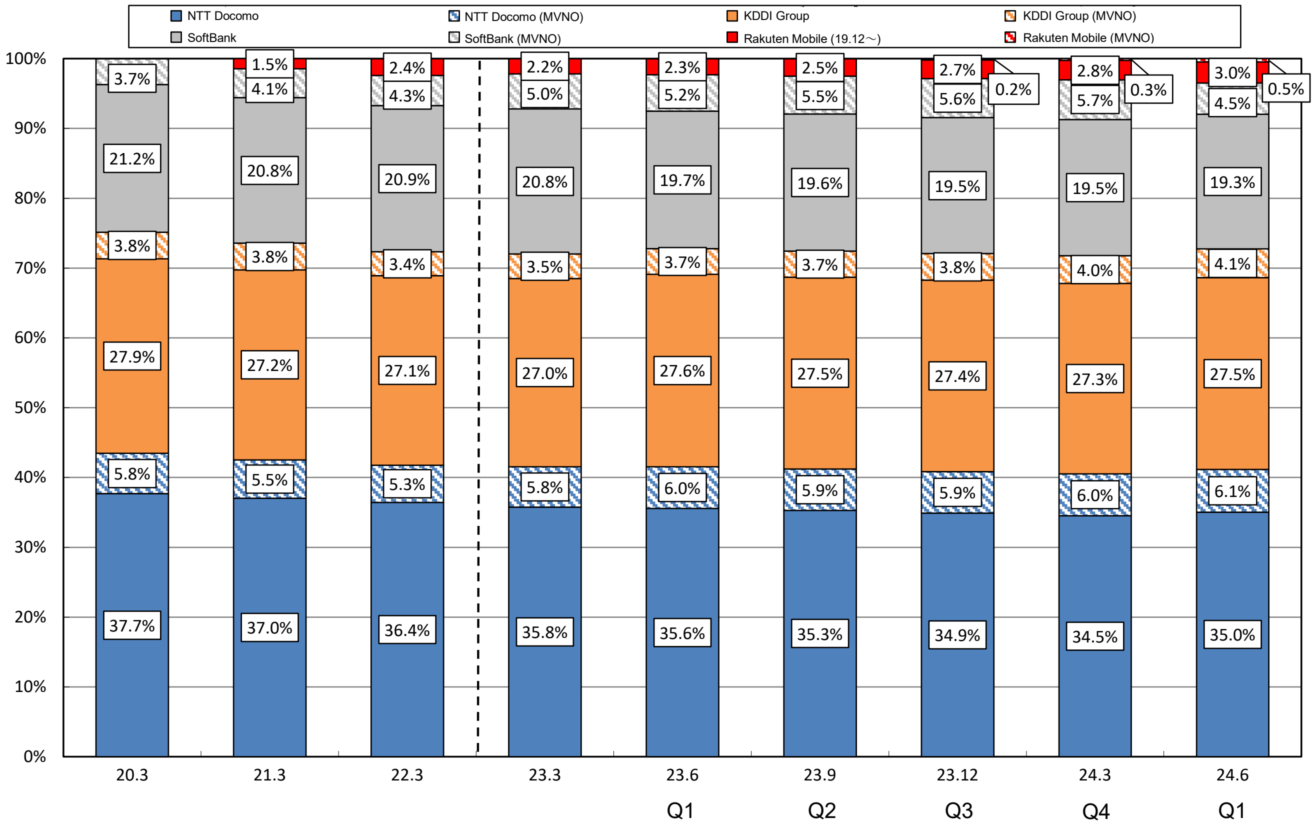
Note: Before FY2022 4Q (March 2023), the number of contracts for wireless fixed broadband provided by mobile phone or BWA was included in the number of contracts for mobile communications. The same applies hereafter.

Changes in the share of mobile communications contracts by operator



Note 1: This does not include services provided by an MNO using mobile communication services provided by another MNO in the same group. The same applies throughout this page.
Note 2: "KDDI Group" includes KDDI, Okinawa Cellular and UQ Communications.
Note 3: The share of MVNOs is summed up for each MNO group that provides the service with the MNO group name followed by "(MVNO)." The same applies throughout this page.
Note 4: The MVNO services provided by Rakuten Mobile are included in "NTT Docomo (MVNO)" and "KDDI Group (MVNO)". The same applies throughout this page.

Changes in the share of mobile phone contracts by operator



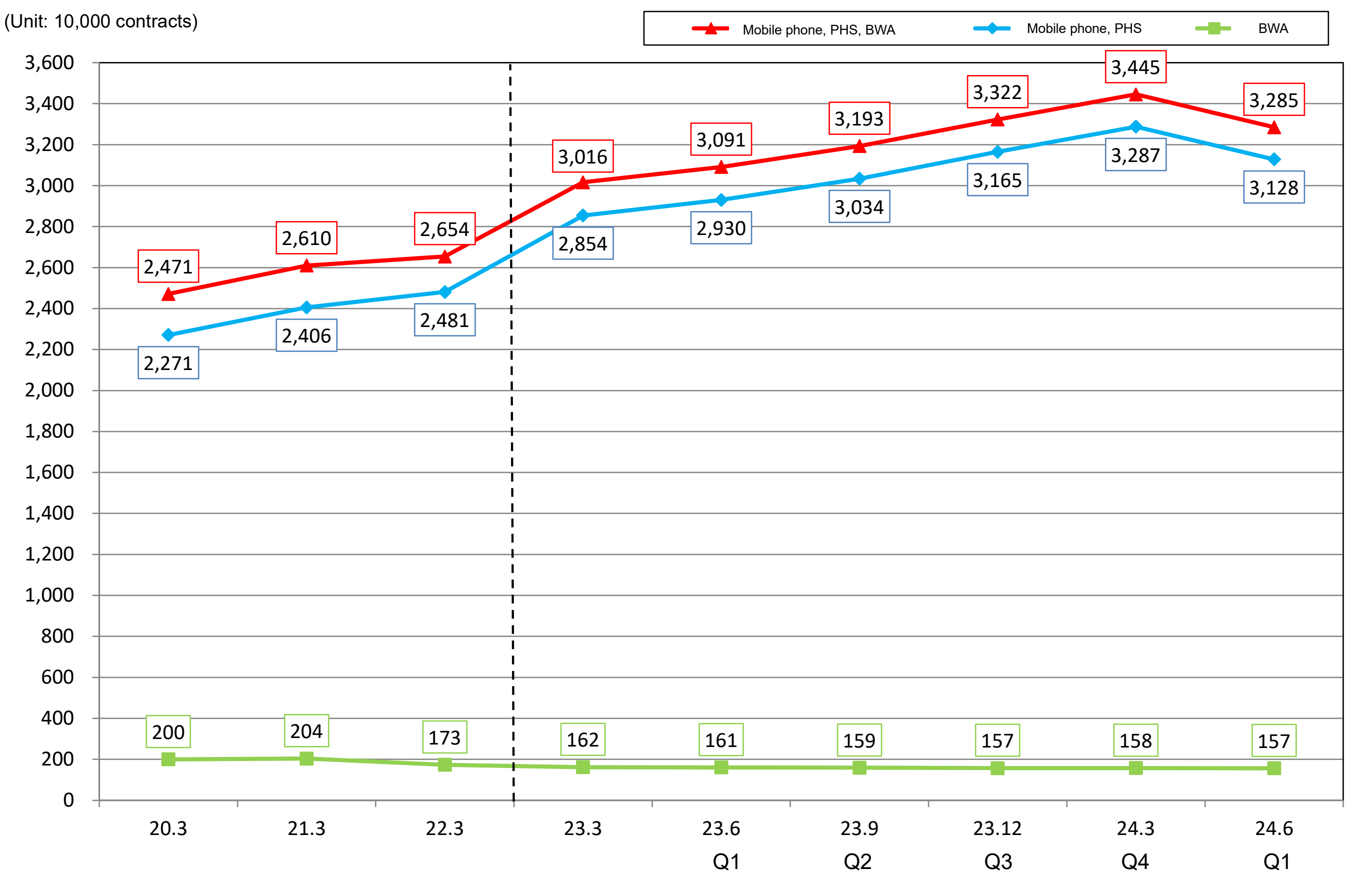
Note: "KDDI Group" includes KDDI, Okinawa Cellular and UQ Communications (up to FY2020 Q2).

(2) MVNO included in (1)

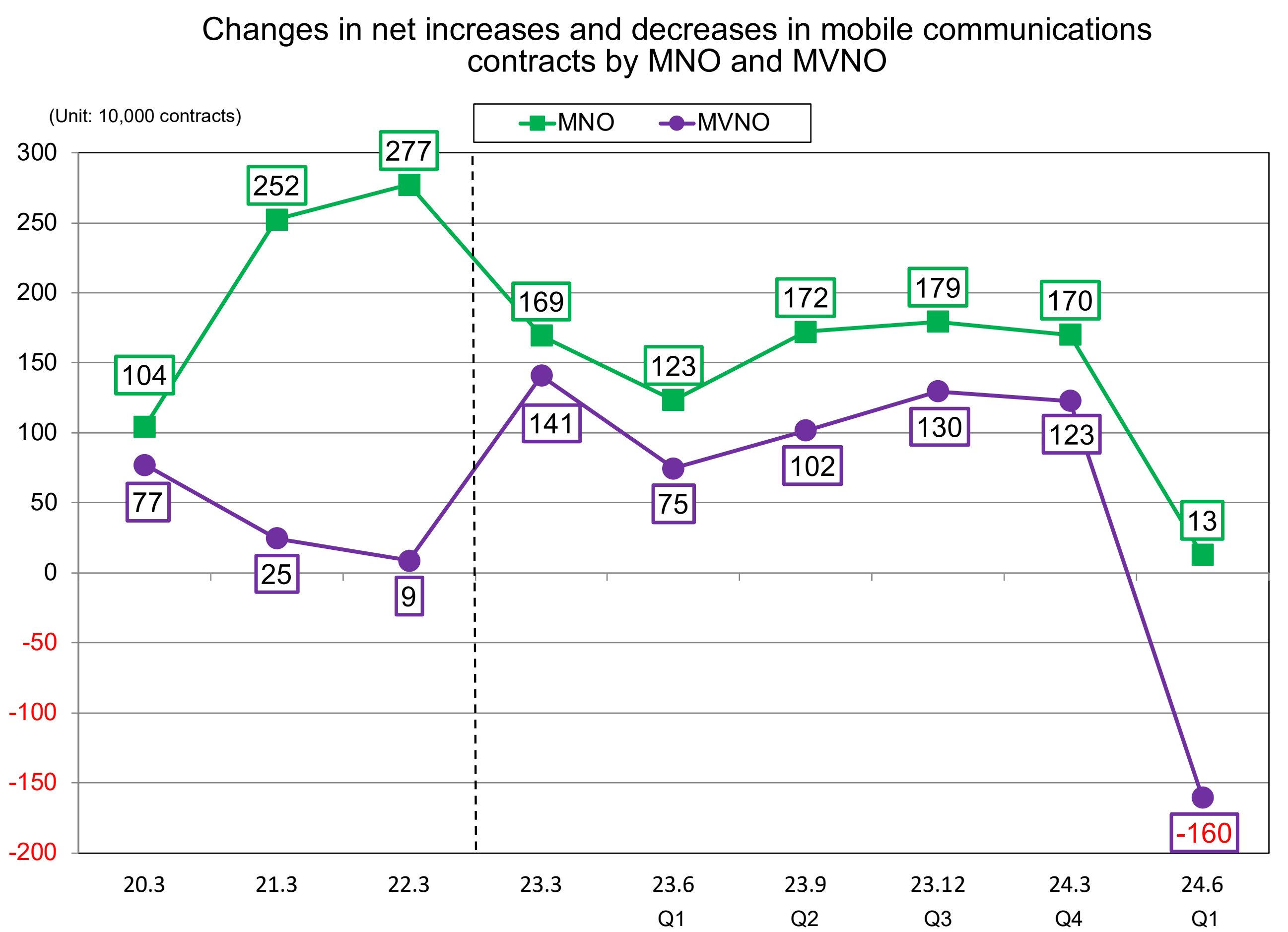
- **The number of MVNO service contracts**[*1] (included in the number of mobile communications contracts) was **32.85 million** (down 4.7% from the previous quarter and up 6.3% from the same quarter of the previous year).
- **The number of contracts in the MVNO service category** with 30,000 or more contracts was **16.67 million for the SIM card type** (up 1.9% from the previous quarter and up 6.1% from the same quarter of the previous year), and **9.86 million for communication module** (down 20.6% from the previous quarter and down 9.8% from the same quarter of the previous year).
- In terms of the share of SIM card type contracts by operator[*2], **Internet Initiative Japan accounted for 21.5%** (down 0.1 points from the previous quarter), **NTT Docomo (related to the former NTT Resonant) for 9.0%** (down 0.7 points from the previous quarter), **OPTAGE for 8.6%** (down 0.1 points from the previous quarter), **Fujitsu for 5.1%** (down 0.5 points from the previous quarter), and **AEON Retail for 4.6%** (unchanged from the previous quarter).
- **The number of operators providing primary MVNO**[*3] **services** was **871** (up 43 from the previous quarter and up 67 from the same quarter of the previous year) [*4], and **the number of operators providing secondary and beyond MVNO**[*5] **services** was **1,110** (up 50 from the previous quarter and up 98 from the same quarter of the previous year).

*1: This does not include services provided by an MNO using mobile communications services provided by another MNO in the same group. Unless otherwise specified, the same applies throughout "(2) MVNO".
*2: This does not contain duplicated contracts resulting from transactions within the MNO group.
*3: This refers to MVNOs that receive lines directly from MNO. The same applies throughout "(2) MVNO".
*4: In addition, there are four other MNOs (KDDI, Okinawa Cellular, UQ Communications and SoftBank) that provide MVNO services using the mobile communications services provided by other MNOs in the same group.
*5: This refers to MVNOs that receive lines from MVNOs. The same applies throughout "(2) MVNO".

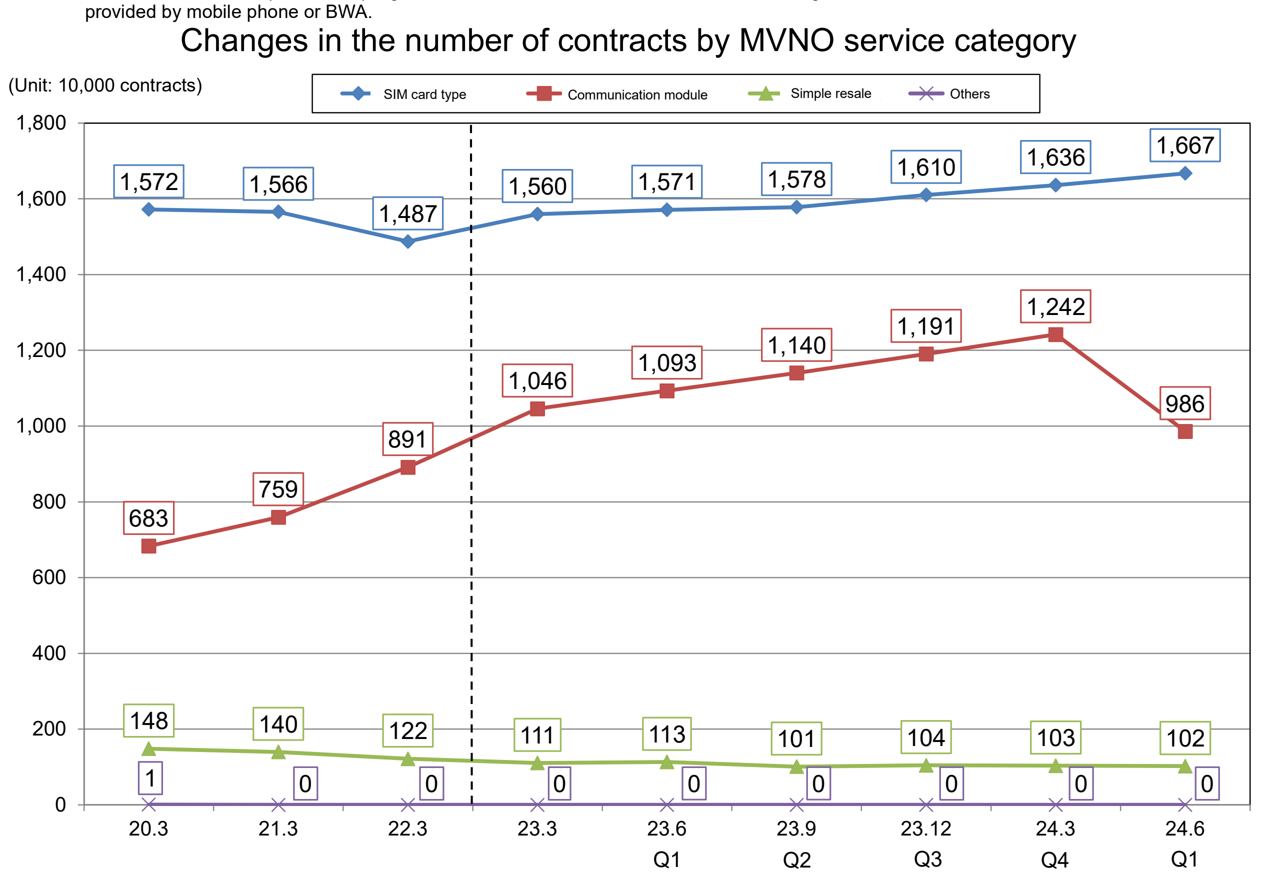
Changes in the number of MVNO service contracts



Note: This is based on reports from MNOs.

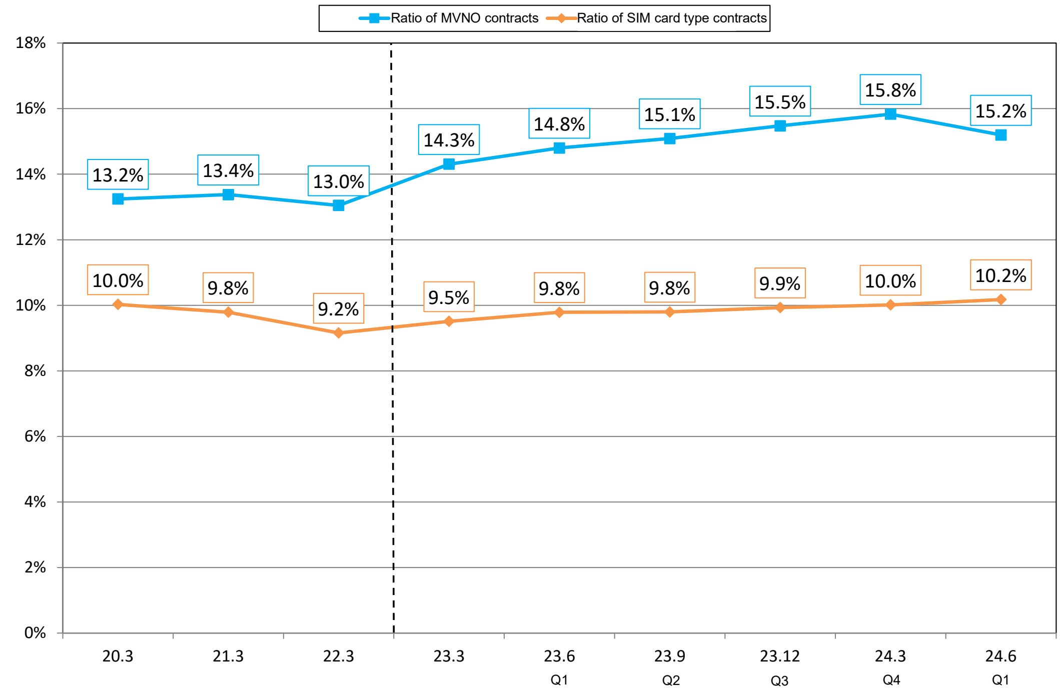


Note 1: This is based on reports from MNOs.
Note 2: This contains the net increases and decreases in the number of contracts across all MNOs and all MVNOs (both are compared to the previous quarter).
Note 3: Before FY2023 Q1 (June 2023), figures show the net increase or decrease including the number of contracts for wireless fixed broadband provided by mobile phone or BWA.



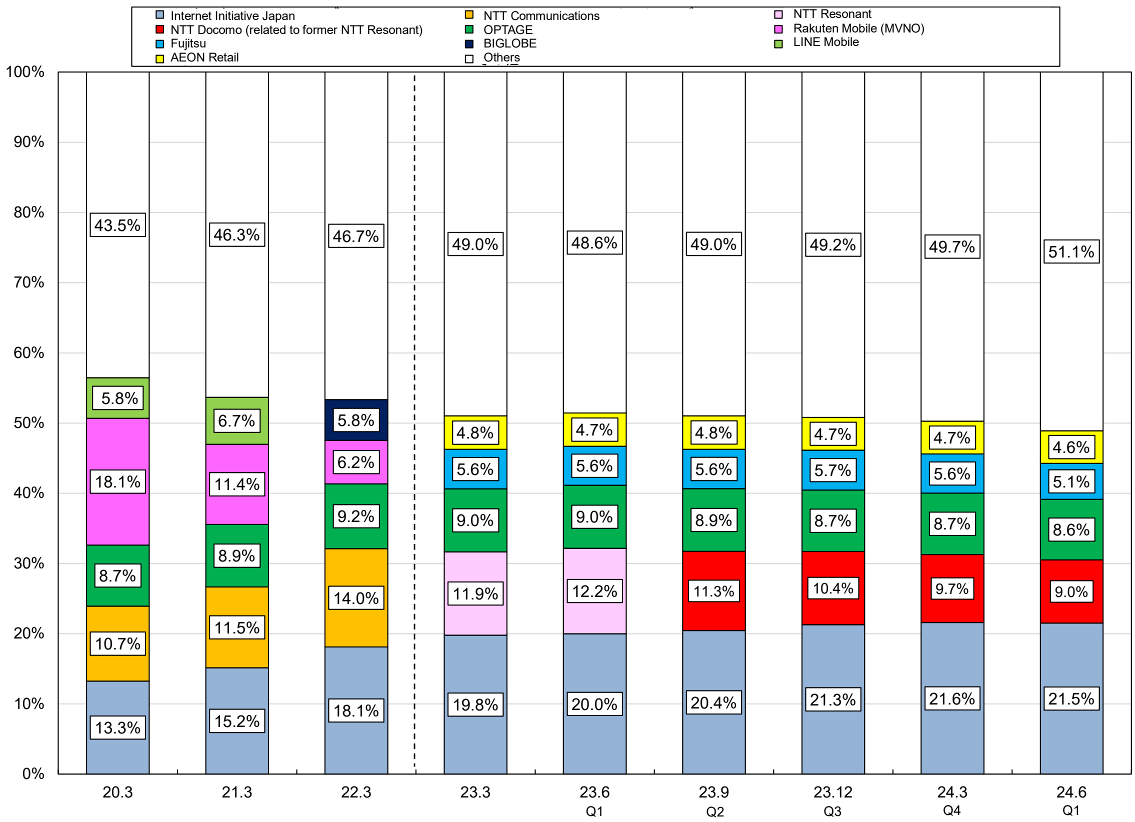
Note 1: This is based on reports from MVNOs with 30,000 or more contracts. Accordingly, the total number differs from the "Changes in the number of MVNO service contracts."
Note 2: "Others" refer to MVNO services that do not fall into the categories of "SIM card type," "Communication module," or "Simple resale."

Changes in the ratio of MVNO service contracts and the ratio of SIM card-type contracts provided by MVNOs



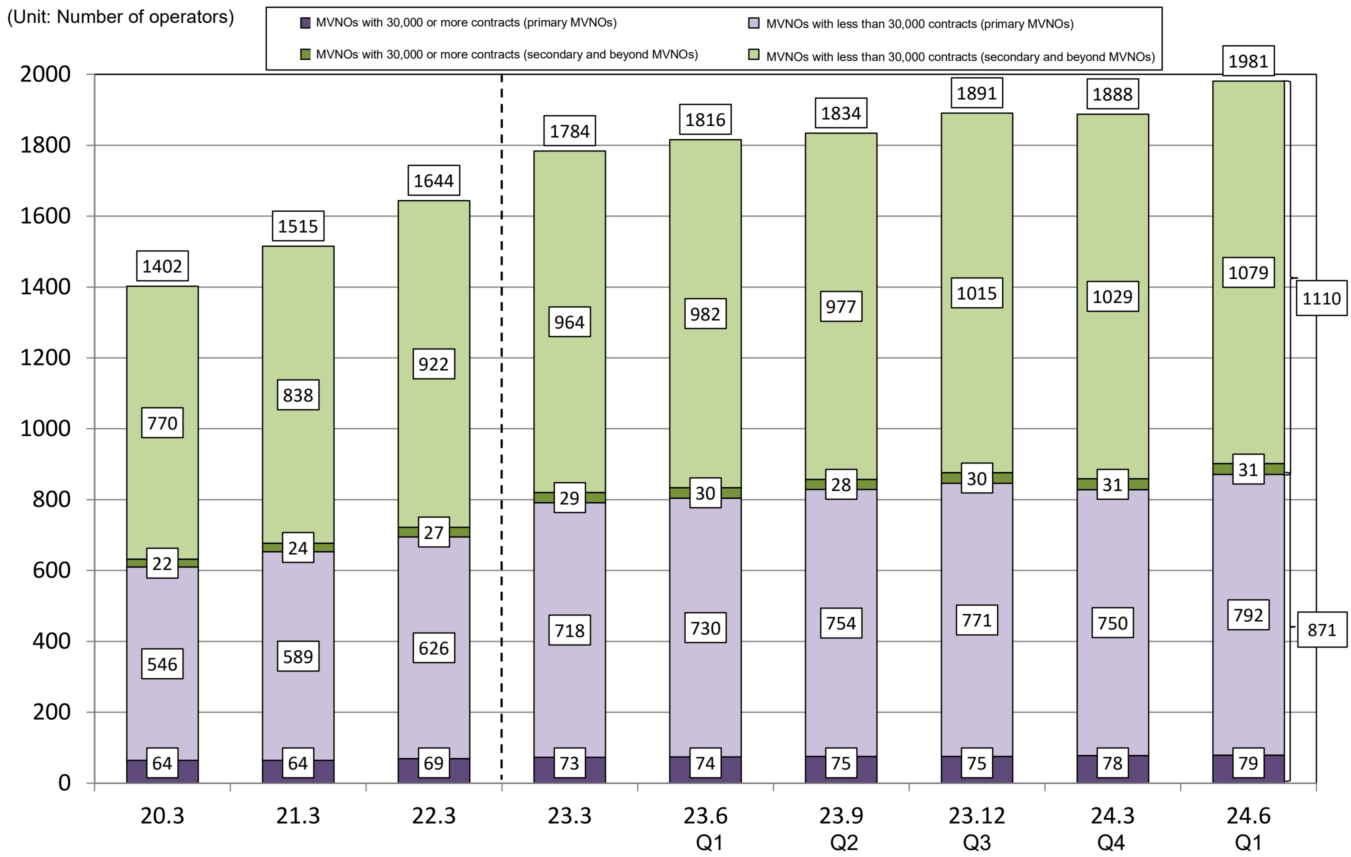
Note 1: Ratio of MVNO service contracts = Number of MVNO service contracts/Number of mobile communication contracts
Note 2: Ratio of MVNO SIM card type contracts = Number of SIM card type contracts provided by MVNOs/(Number of mobile communication contracts - Number of communication module contracts provided by MNOs)
Note 3: The number of SIM card-type contracts provided by MVNOs is the total number reported from MVNOs with 30,000 or more contracts.

Changes in the share of SIM card type contracts by operator



Note 1: This is based on reports from MVNOs with 30,000 or more contracts.
Note 2: The top five operators by market share are shown.
Note 3: The number of contracts for secondary line services is not included.
Note 4: Rakuten Mobile share is its share as an MVNO.
Note 5: NTT Communications' consumer business was transferred to NTT Resonant (July 2022).
Note 6: NTT Docomo absorbed NTT Resonant (July 2023).
Note 7: NTT Docomo share is related to services provided by its predecessor NTT Resonant, and it includes "OCN Mobile ONE" of NTT Docomo using the MVNO service provided by NTT Communications as a wholesale telecommunications service.

Changes in the number of MVNO service operators



Note 1: This is based on reports from primary MVNOs and secondary and beyond MVNOs with 30,000 or more contracts.
Note 2: This does not include MVNOs with less than 30,000 contracts who only receive lines from secondary and beyond MNVOs with less than 30,000 contracts.
Note 3: Due to corrections of reports from operators, the number of operators has been modified in FY2023 Q4 (March 2024).

[Reference] Changes in the number of operators by MVNO service category

(Unit: Number of operators)

Category	20.3	21.3	22.3	23.3	23.6	23.9	23.12	24.3	24.6
SIM card type	57 (34)	57 (31)	60 (32)	65 (35)	69 (37)	71 (40)	72 (40)	74 (43)	77 (44)
Communication Module	25 (17)	24 (17)	29 (22)	31 (24)	31 (24)	31 (25)	32 (25)	32 (25)	32 (25)
Simple resale	27 (19)	28 (20)	30 (18)	30 (17)	30 (18)	28 (17)	28 (17)	28 (17)	28 (17)
Other	3 (2)	1 (0)	1 (0)	1 (0)	1 (0)	1 (0)	1 (0)	1 (0)	1 (0)
Re-wholesale	48 (32)	46 (32)	52 (36)	55 (37)	57 (38)	57 (38)	57 (38)	56 (37)	58 (37)

Note 1: This is based on reports from MVNOs with 30,000 or more contracts.
Note 2: Operators that provide multiple services are included in each of the relevant service categories.
Note 3: Figures in parentheses indicate the number of MVNOs that receive lines directly from MNOs to provide services related to each category.

[Reference] Changes in the number of MVNO service category "re-wholesale" contracts

(Unit: 10,000 contracts)

20. 3	21. 3	22. 3	23. 3	23. 6	23. 9	23. 12	24. 3	24. 6
1, 083	1, 003	1, 004	1, 204	1, 273	1, 283	1, 283	1, 303	1, 333

Note: This is based on reports from MVNOs with 30,000 or more contracts.

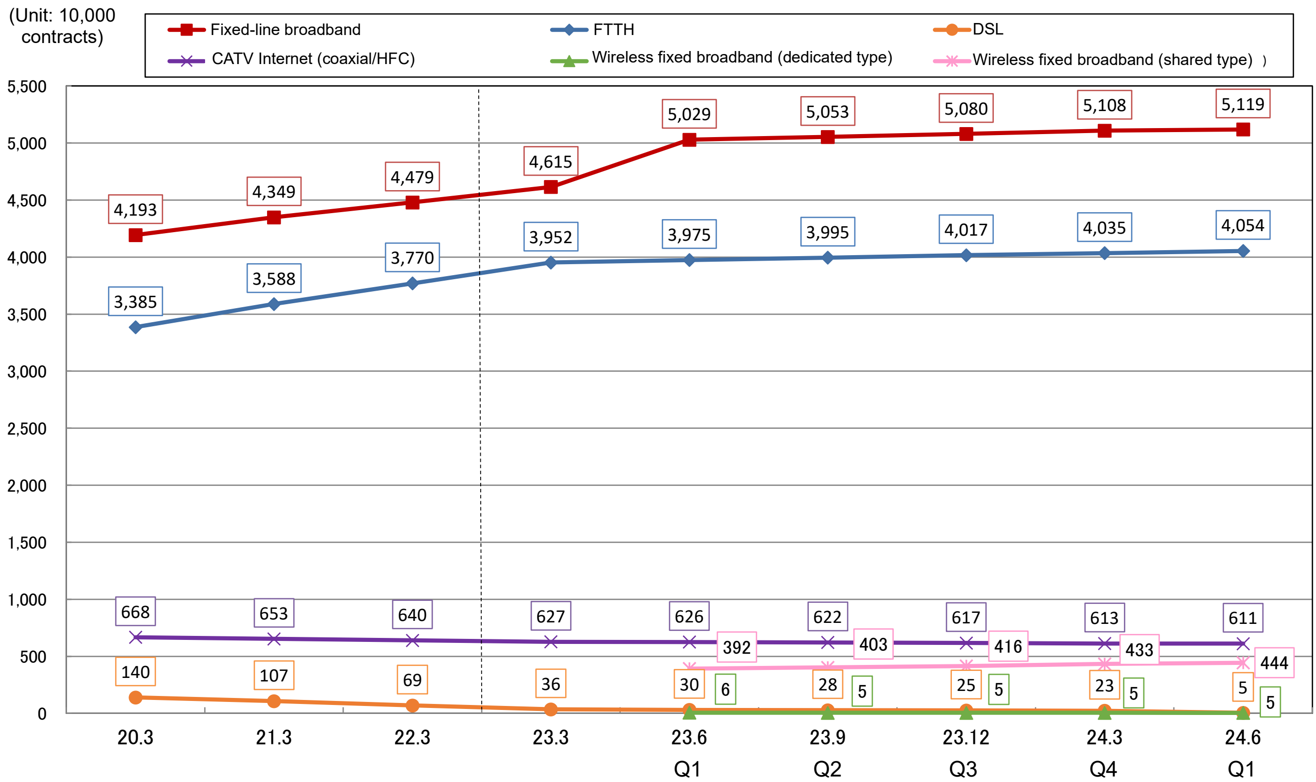
2. Fixed-line communications
(1) Data communications
1) Fixed-line broadband

○ **<u>The number of fixed-line broadband service[*1] contracts</u> was 51.19 million (up 0.2% from the previous quarter and up 1.8% from the same quarter of the previous year).**

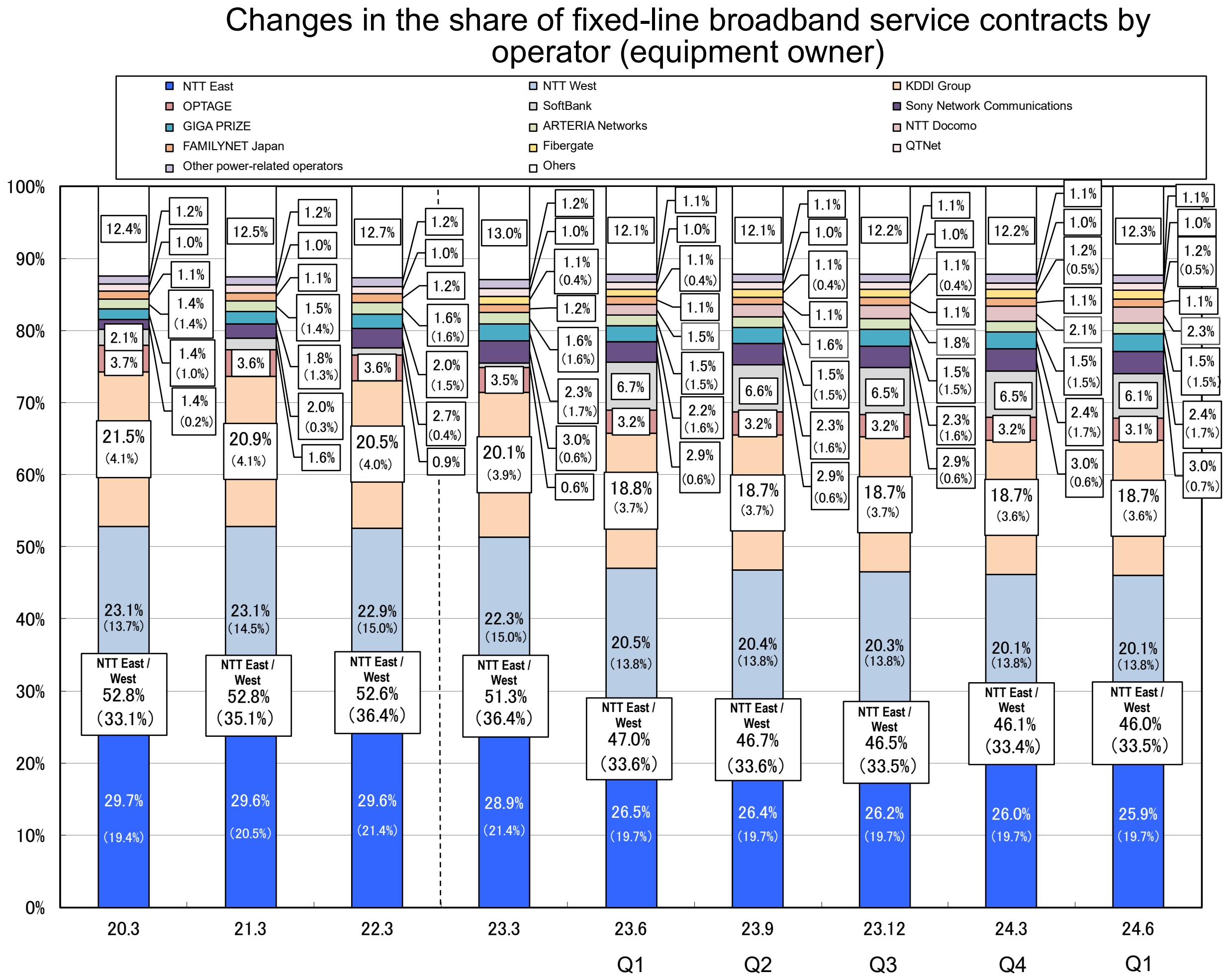
○ **The share of fixed-line broadband contracts by <u>NTT East and West</u> was 12.5% (down 0.2 points from the previous quarter and down 0.9 points from the same quarter of the previous year; or 46.0% when including those related to the provision of wholesale telecommunications services[*2]).**

*1: Total of FTTH, DSL, CATV Internet (coaxial /HFC) and wireless fixed broadband.
*2: Telecommunication services used by telecommunication carriers for their telecommunication businesses.

Changes in the number of fixed-line broadband service contracts



Note: Before FY2022 Q4 (March 2023), the number of contracts for "Wireless fixed broadband" was not included in the number of contracts for "Fixed-line broadband".



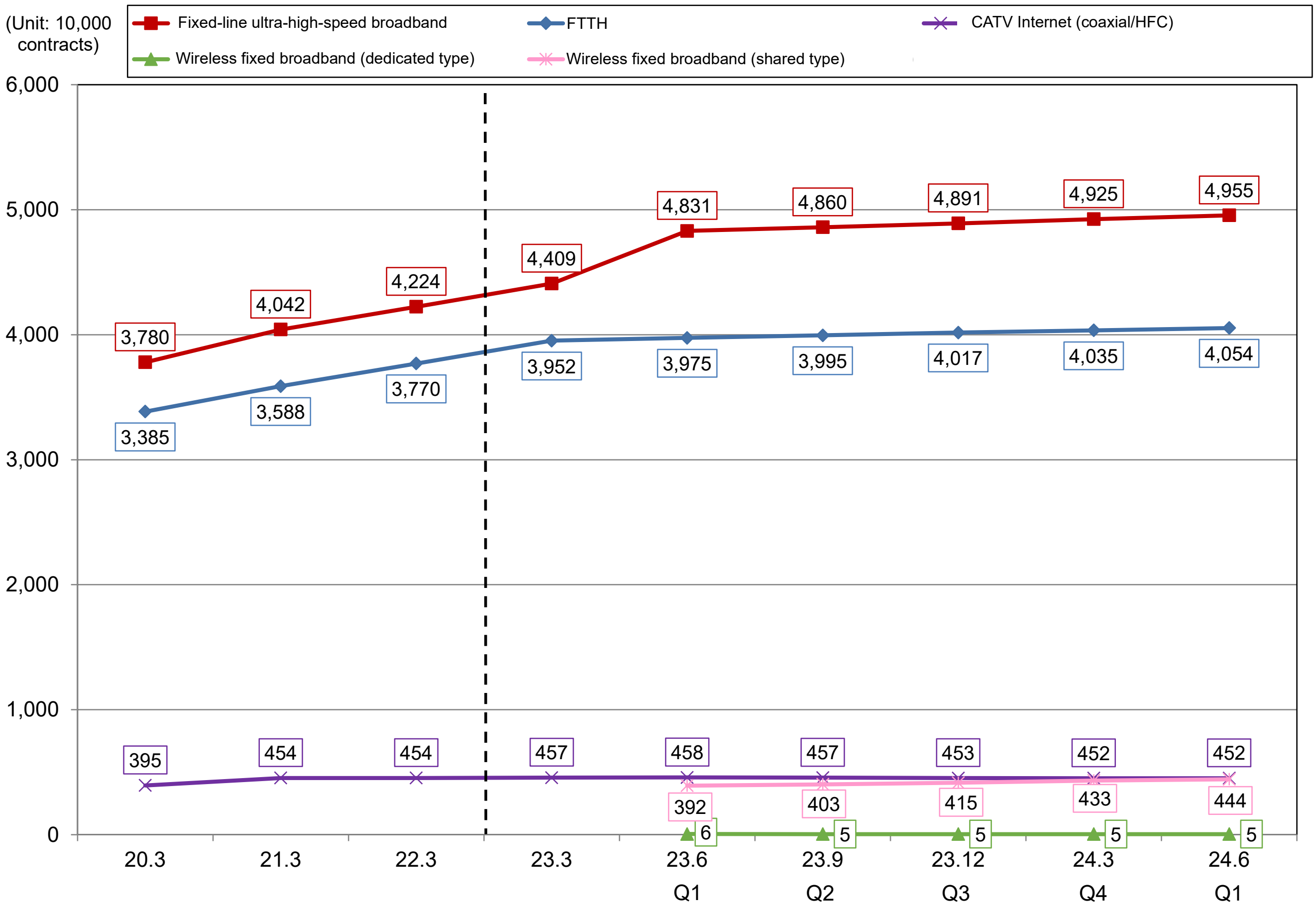
Note 1: "KDDI Group" includes KDDI, Okinawa Cellular, Chubu Telecommunications, OTNet and J:COM Group. Unless otherwise specified, the same applies to 3) in "(1) Data Communications."
Note 2: "Other power-related businesses" include STNet and Enecom. Unless otherwise specified, the same applies to 3) in "(1) Data communications."
Note 3: Figures in parentheses indicate the share for the provision of wholesale telecommunications services.

2) Fixed-line ultra-high-speed broadband (included in 1))

- **The number of fixed-line ultra-high-speed broadband service* contracts was 49.55 million (up 0.6% from the previous quarter and up 2.6% from the same quarter of the previous year). Of these, FTTH accounted for 40.54 million (up 0.5% from the previous quarter and up 2.0% from the same quarter of the previous year) and CATV Internet (coaxial/HFC) for 4.52 million (up 0.1% from the previous quarter and down 1.2% from the same quarter of the previous year) and Wireless fixed broadband for 4.49 million (up 2.4% from the previous quarter and up 12.7% from the same quarter of the previous year).**
- **The number of FTTH contracts increased in all prefectures, while the number of CATV Internet (coaxial/HFC) contracts decreased in 29 prefectures (compared to the previous quarter).**

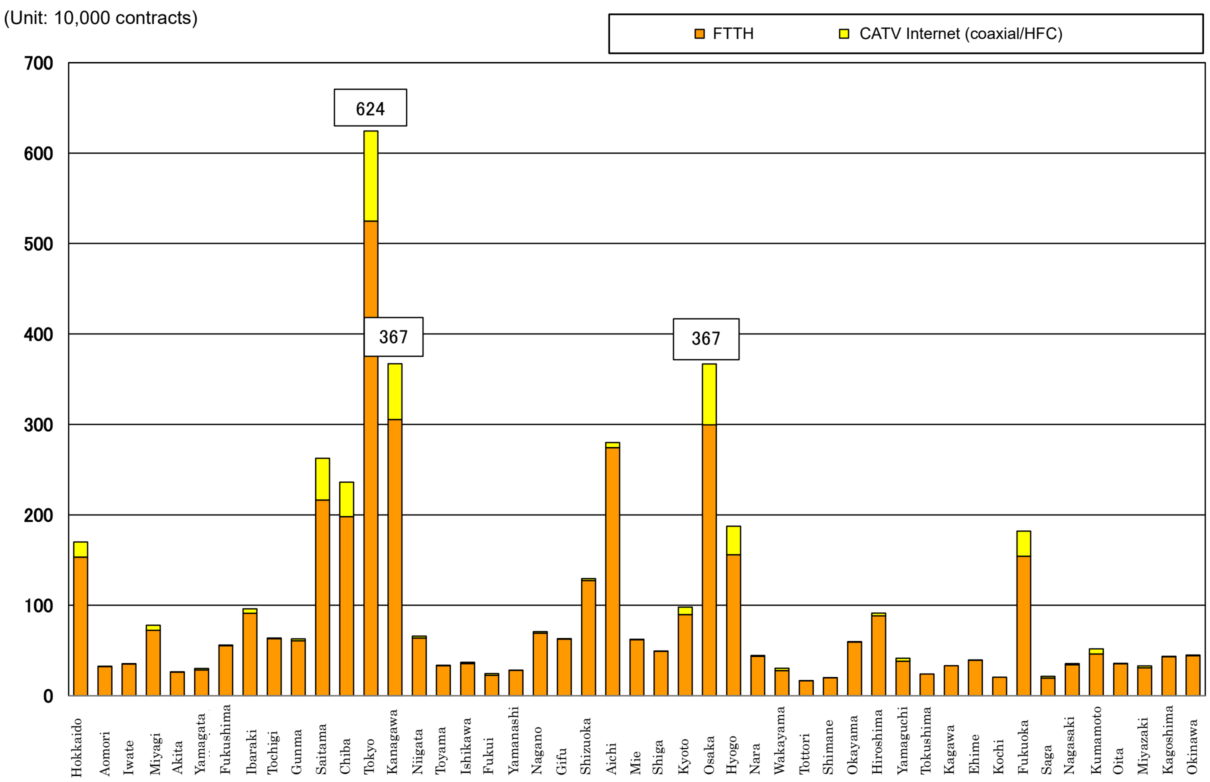
* The total of contracts for FTTH, CATV Internet (coaxial/HFC) and wireless fixed broadband. However, this is limited to those with a download speed of 30 Mbps or more for CATV Internet. The same applies throughout "2) Fixed-line ultra-high-speed broadband."

Changes in the number of fixed-line ultra-high-speed broadband service contracts

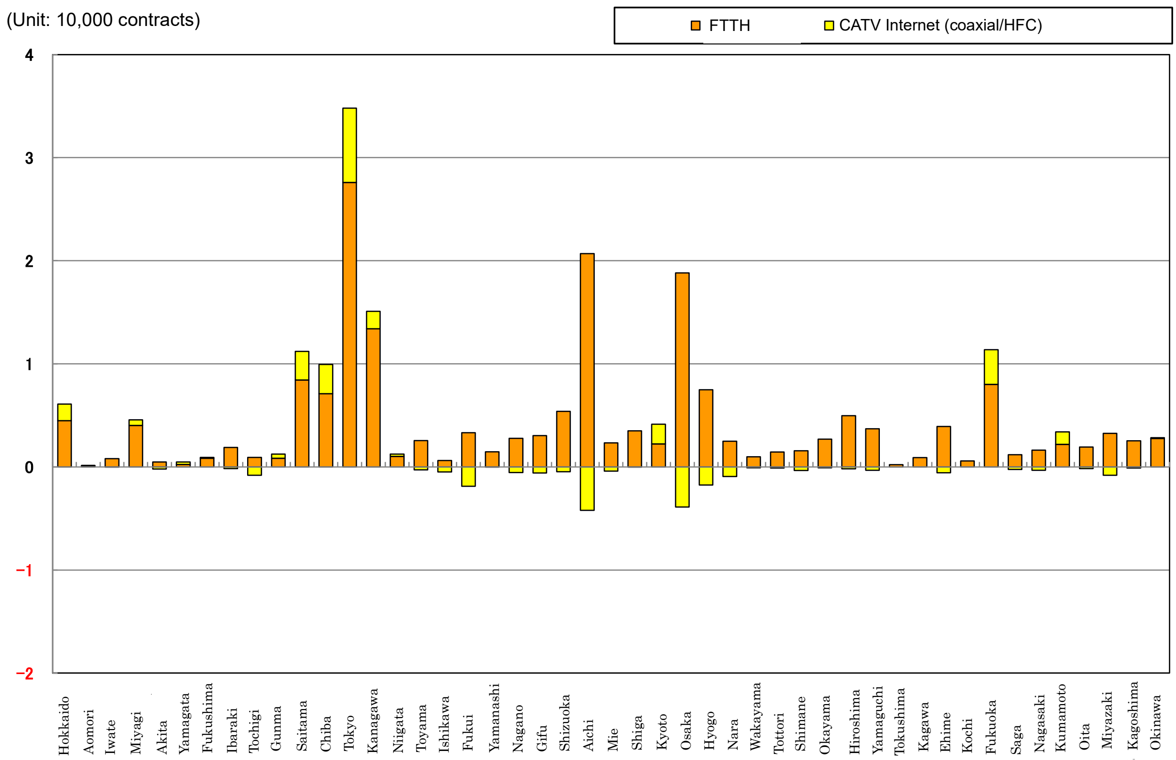


Note: Before FY2022 Q4 (March 2023), the number of contracts for "Wireless fixed broadband" was not included in the number of contracts for "Fixed-line ultra-high-speed broadband."

Number of fixed-line ultra-high-speed broadband service contracts by prefecture



Net increases and decreases in fixed-line ultra-high-speed broadband contracts by prefecture (compared to the previous quarter)



3) FTTH (included in 2))

○ **The number of FTTH contracts was 40.54 million** (up 0.5% from the previous quarter and up 2.0% from the same quarter of the previous year).

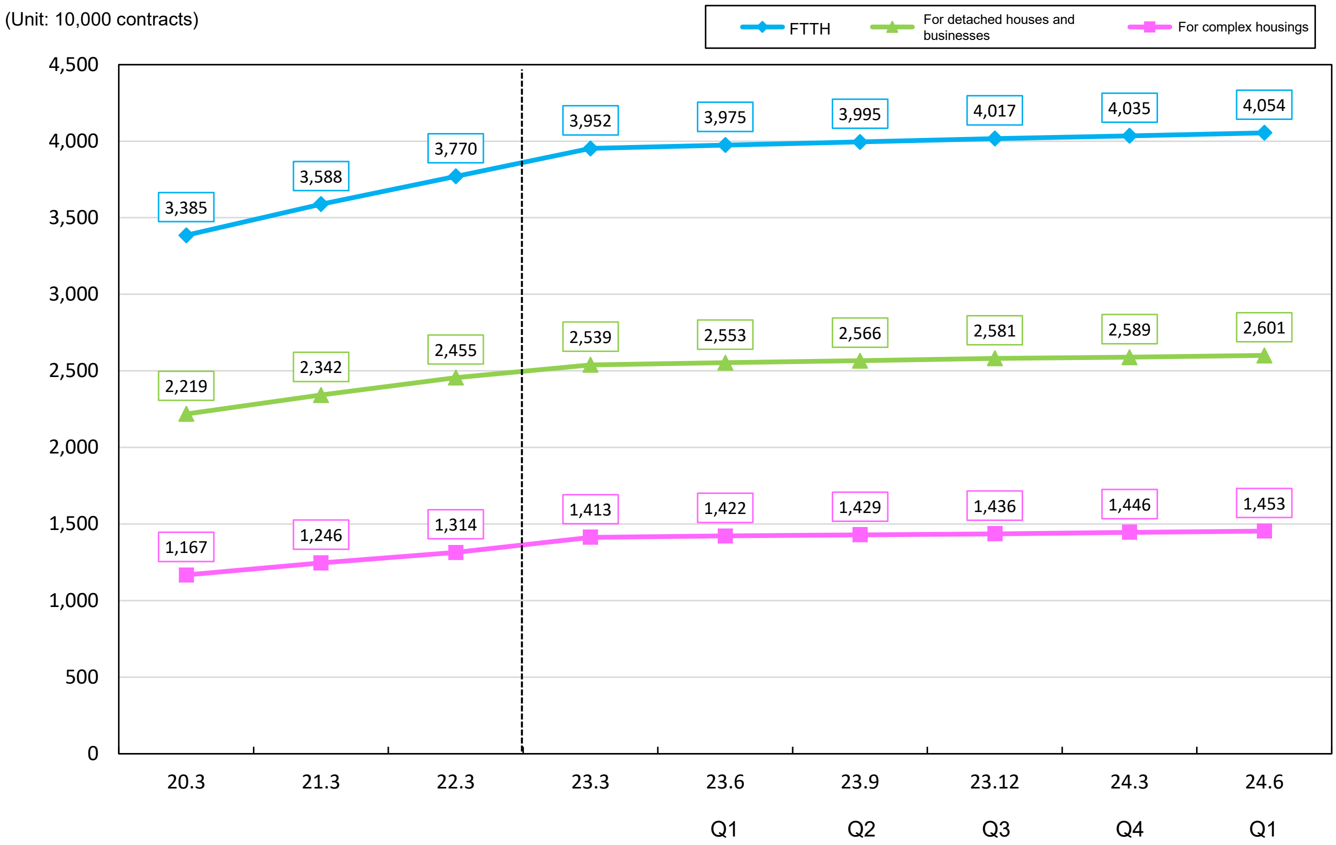
○ **In terms of the share of FTTH contracts by telecommunications equipment owning operator** (including operators related to the provision of wholesale telecommunications services), **NTT East and West accounted for 58.0%** (down 0.3 points from the previous quarter and down 1.3 points from the same quarter of the previous year), **KDDI Group for 10.6%** (unchanged from the previous quarter and the same quarter of the previous year), and **OPTAGE for 4.0%** (unchanged from the previous quarter and down 0.1 points from the same quarter of the previous year).

○ **In terms of the share of FTTH contracts by service provider*1, NTT Docomo accounted for 19.4%** (down 0.2 points from the previous quarter and up 0.7 points from the same quarter of the previous year), **NTT East and West for 15.6%** (down 0.3 points from the previous quarter and down 1.2 points from the same quarter of the previous year), **SoftBank for 11.8%** (up 0.1 points from the previous quarter and up 0.3 points from the same quarter of the previous year), and **KDDI Group*2 for 9.5%** (unchanged from the previous quarter and up 0.2 points from the same quarter of the previous year).

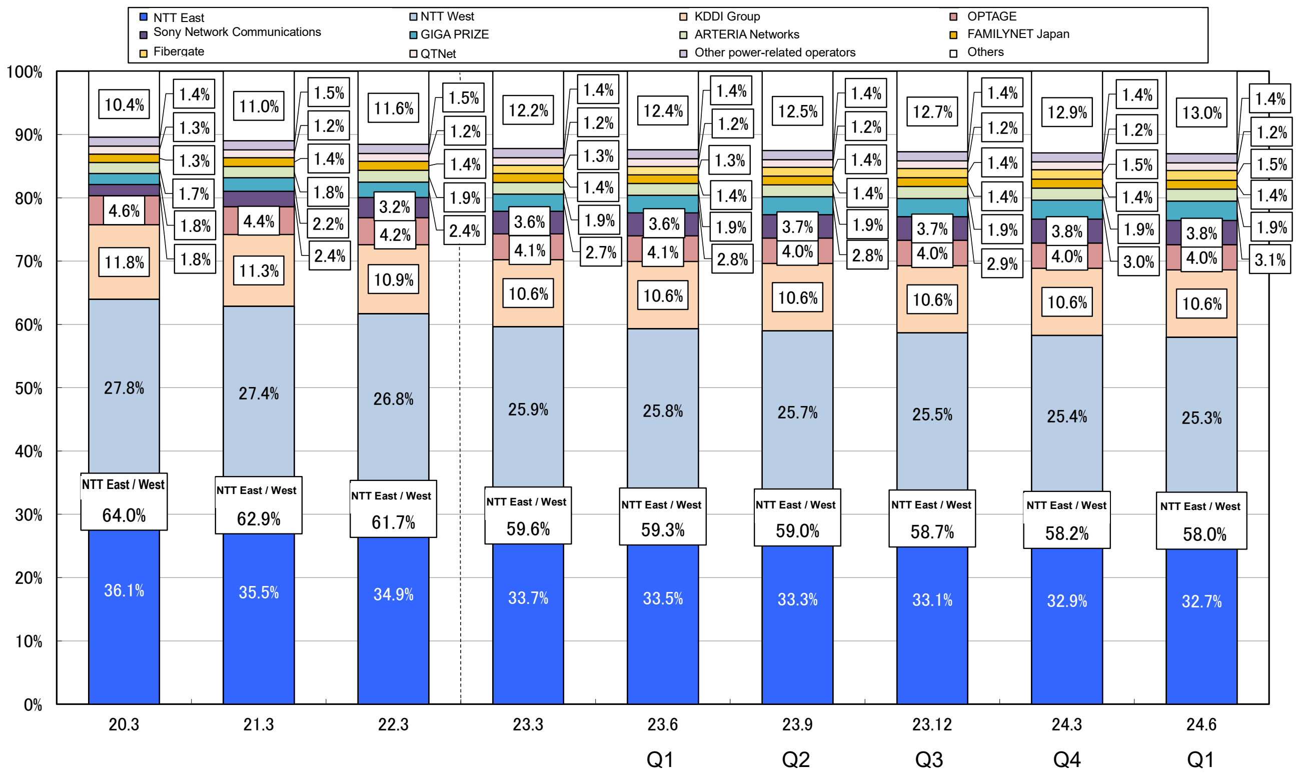
○ **Of the total number of FTTH contracts, the number of contracts related to wholesale telecommunication services was 21.63 million** (53.3% of the total number of FTTH contracts (up 0.1 points from the previous quarter and up 0.3 points from the same quarter of the previous year)). **Of these, the number of contracts related to wholesale telecommunication services (service wholesale) of NTT East and West was 17.17 million, accounting for 42.3% of the total number of FTTH contracts** (unchanged from the previous quarter and down 0.2 points from the same quarter of the previous year).

*1: This includes operators who receive wholesale telecommunication services and provide FTTH services to end users.
*2: This includes operators in the KDDI Group in "Changes in the share of FTTH contracts by operator (service provider)."

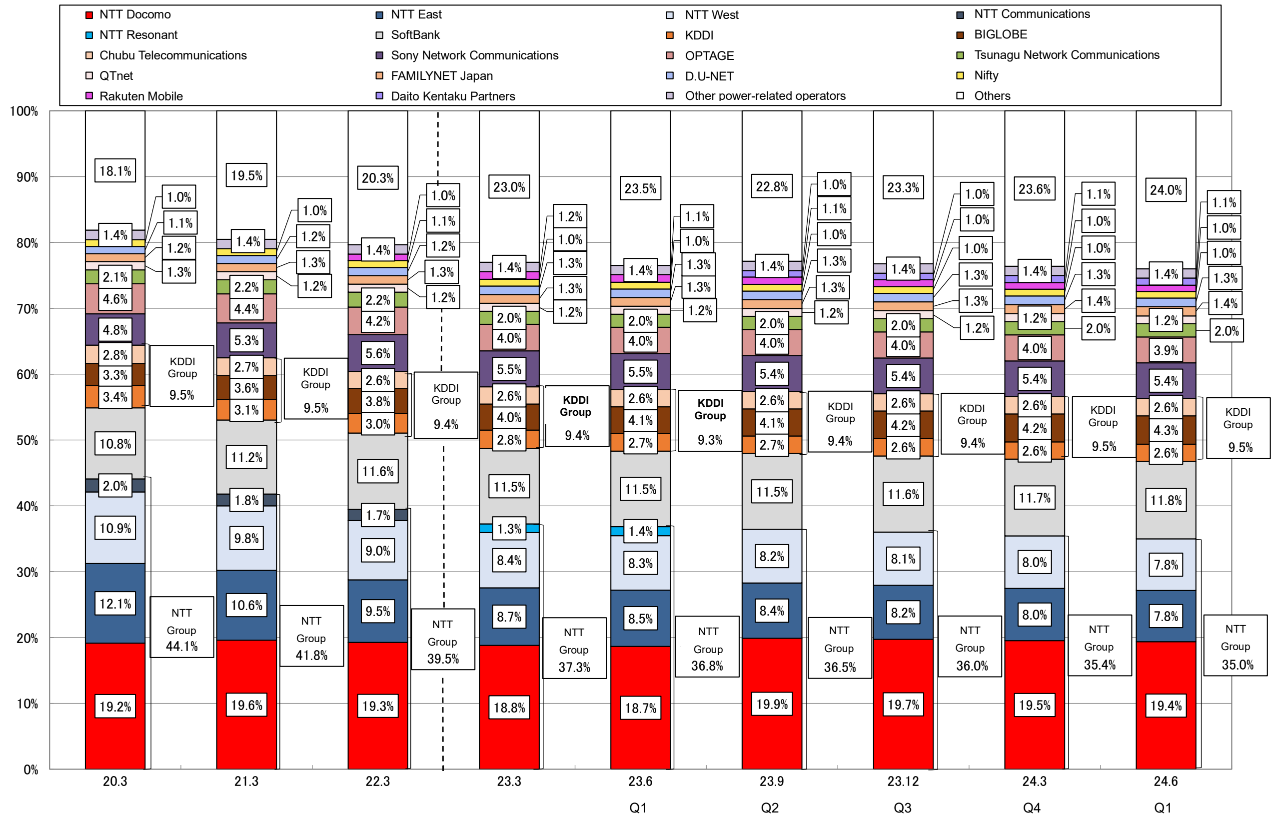
Changes in the number of FTTH contracts



Changes in the share of FTTH contracts by operator (equipment owner)

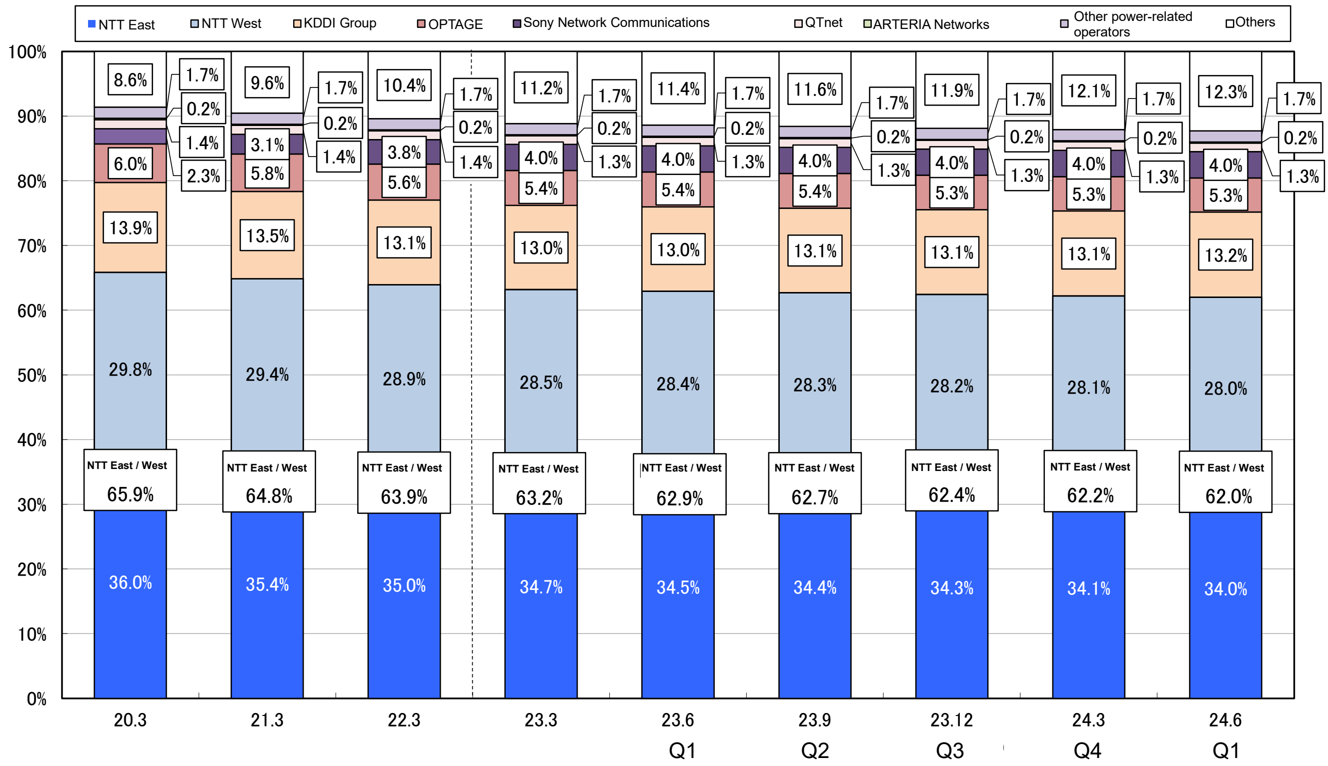


Changes in the share of FTTH contracts by operator (service provider)

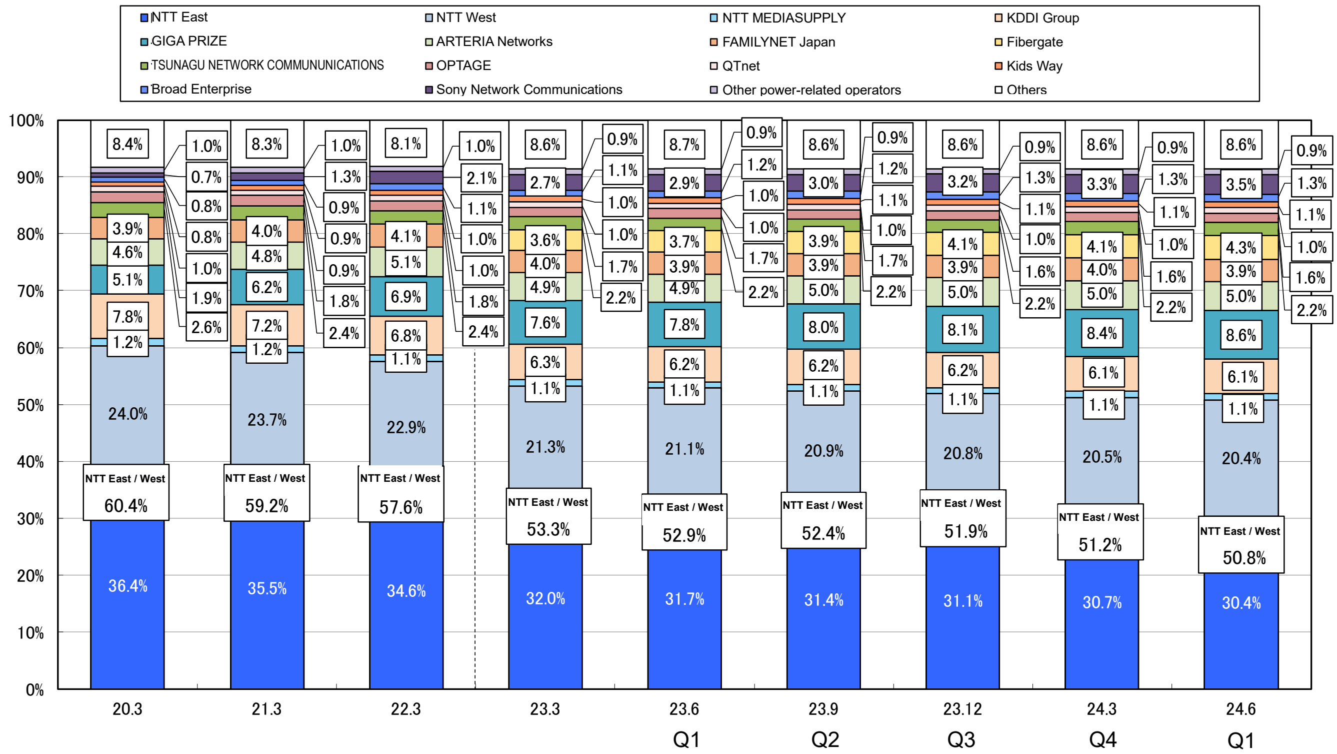


Note 1: Operators with a market share of 1% or more are listed.
Note 2: For operators receiving wholesale telecommunications services, the number of re-wholesale contracts is excluded from the count.

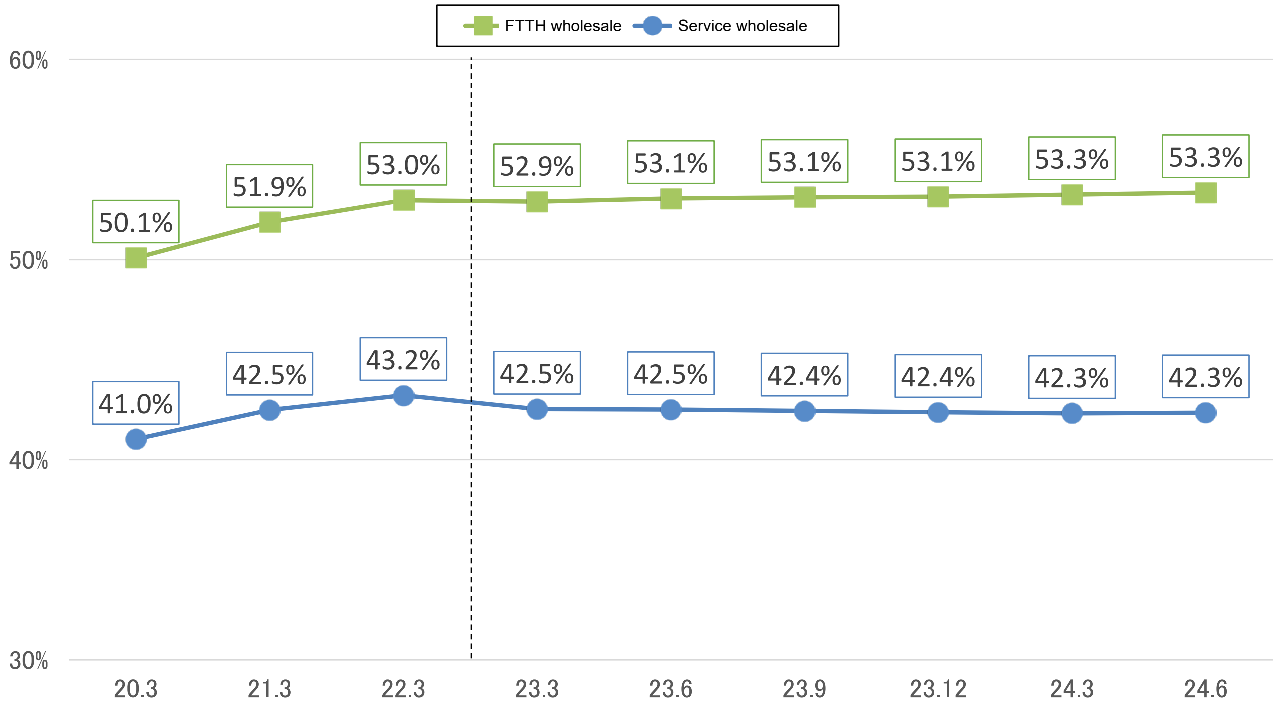
Changes in the share of FTTH contracts by operator (equipment owner) for detached houses and businesses



Changes in the share of FTTH contracts by operator (equipment owner) for housing complexes



Changes in the ratio of wholesale contracts in FTTH contracts



Note 1: "FTTH wholesale" refers to FTTH services provided using wholesale telecommunications services.
Note 2: "Service wholesale" refers to the FTTH wholesale services provided by NTT East and West.

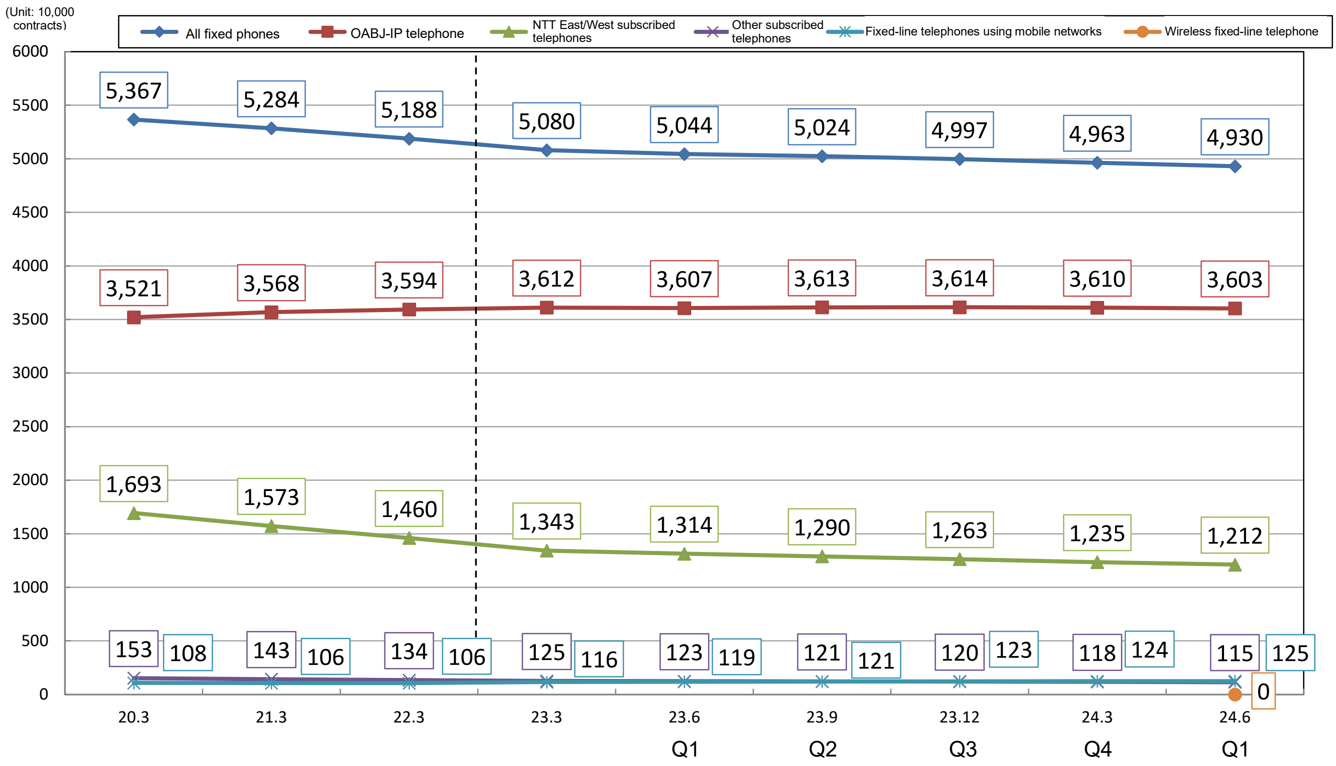
(2) Voice communications
1) Fixed-line telephone

○ **The number of fixed-line telephone* contracts was 49.30 million** (down 0.7% from the previous quarter and down 2.3% from the same quarter of the previous year). **Of these, the number of 0ABJ-IP telephone contracts was 36.03 million** (down 0.2% from the previous quarter and down 0.1% from the same quarter of the previous year), and **the number of NTT East and West subscribed telephone contracts was 12.12 million** (down 1.9% from the previous quarter and down 7.8% from the same quarter of the previous year).

○ **In terms of the share of fixed-line telephone contracts by operator, NTT East and West (the total of NTT East and West subscribed telephones and 0ABJ-IP telephone contracts) accounted for 62.3%** (down 0.2 points from the previous quarter and down 0.9 points from the same quarter of the previous year) and **KDDI Group for 22.3%** (unchanged from the previous quarter and up 0.1 points from the same quarter of the previous year).

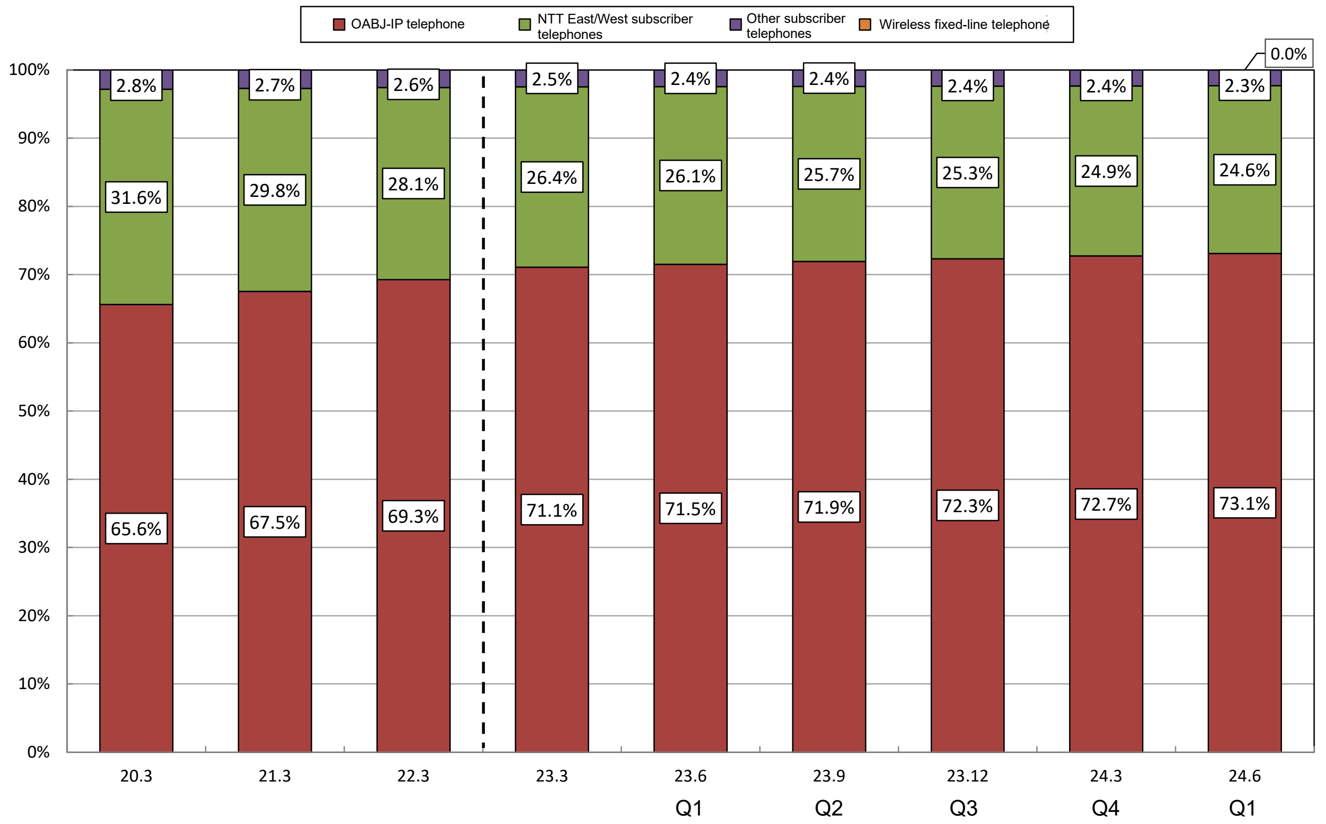
* This refers to NTT East and West subscribed telephones services (excluding 0ABJ-IP telephone but including ISDN), other subscribed telephones services (the total of direct subscription, new type direct access, and direct access ISDN services), 0ABJ-IP telephone and wireless fixed-line telephone services.

Changes in the number of fixed-line telephone contracts

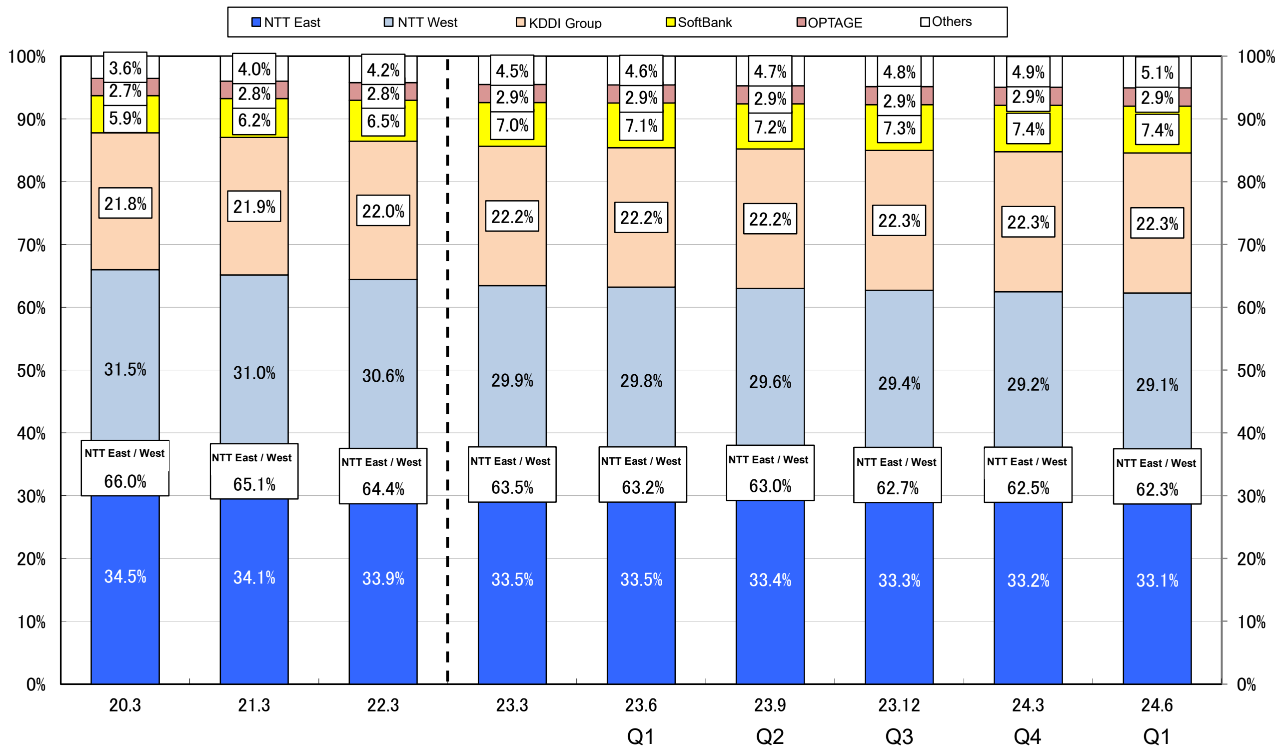


Note 1: For "0ABJ-IP telephone," the number of phone numbers in use is regarded as the number of contracts. 0ABJ-IP telephone is classified as fixed telephone because of its high substitutability for NTT East and West subscribed telephones, but it is also shown as an IP telephone from page 18 onwards.
Note 2: The number of contracts for "Fixed-line telephones using mobile networks" is the total number of contracts for "Wireless fixed-line telephones" and "Mobile network fixed-line telephones," which are part of "0ABJ-IP telephones."

Changes in the number of fixed-line telephone contracts by service



Changes in the share of fixed-line telephone contracts by operator



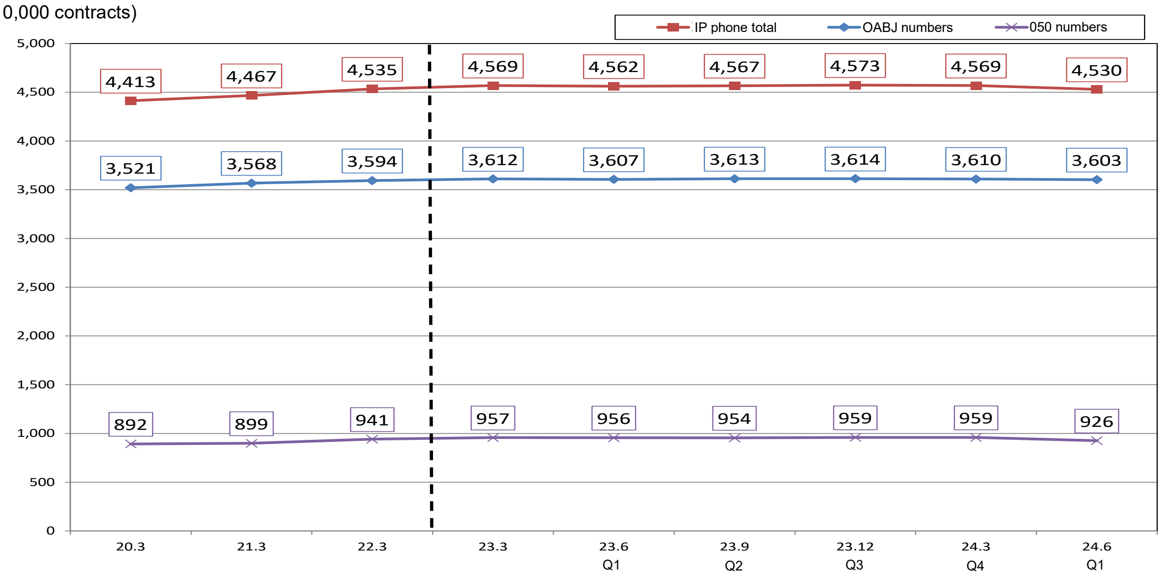
Note 1: The numbers for "NTT East and West" contain the total of subscribed telephones (including ISDN), 0ABJ-IP and wireless fixed-line telephones.
Note 2: "KDDI Group" includes KDDI, Chubu Telecommunications and J:COM Group (up to FY2020 Q3). Unless otherwise specified, the same applies throughout "(2) Voice communications."

2) IP phone

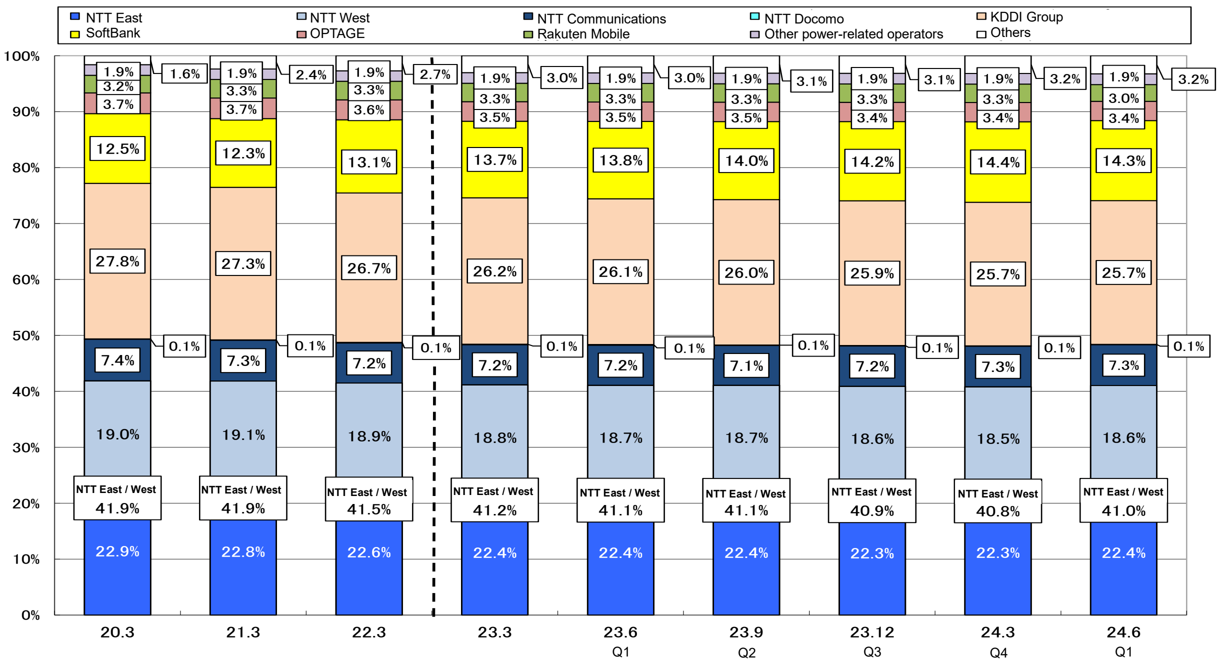
- **The number of IP phone numbers in use was 45.30 million** (down 0.9% from the previous quarter and down 0.7% from the same quarter of the previous year) **of which the number of 0ABJ numbers in use was 36.03 million** (down 0.2% from the previous quarter and down 0.1% from the same quarter of the previous year), and **the number of 050 numbers in use was 9.26 million** (down 3.4% from the previous quarter and down 3.1% from the same quarter of the previous year).
- **In terms of the share of 0ABJ numbers in use by operator, NTT East and West accounted for 51.6%** (down 0.1 points from the previous quarter and down 0.4 points from the same quarter of the previous year) and **KDDI Group for 30.5%** (down 0.1 points from the previous quarter and down 0.5 points from the same quarter of the previous year).
- **In terms of the share of 050 numbers in use by operator, SoftBank accounted for 42.7%** (up 0.1 points from the previous quarter and up 1.4 points from the same quarter of the previous year) and **NTT Communications for 22.6%** (up 0.5 points from the previous quarter and unchanged from the same quarter of the previous year).

Changes in the number of IP phone numbers in use

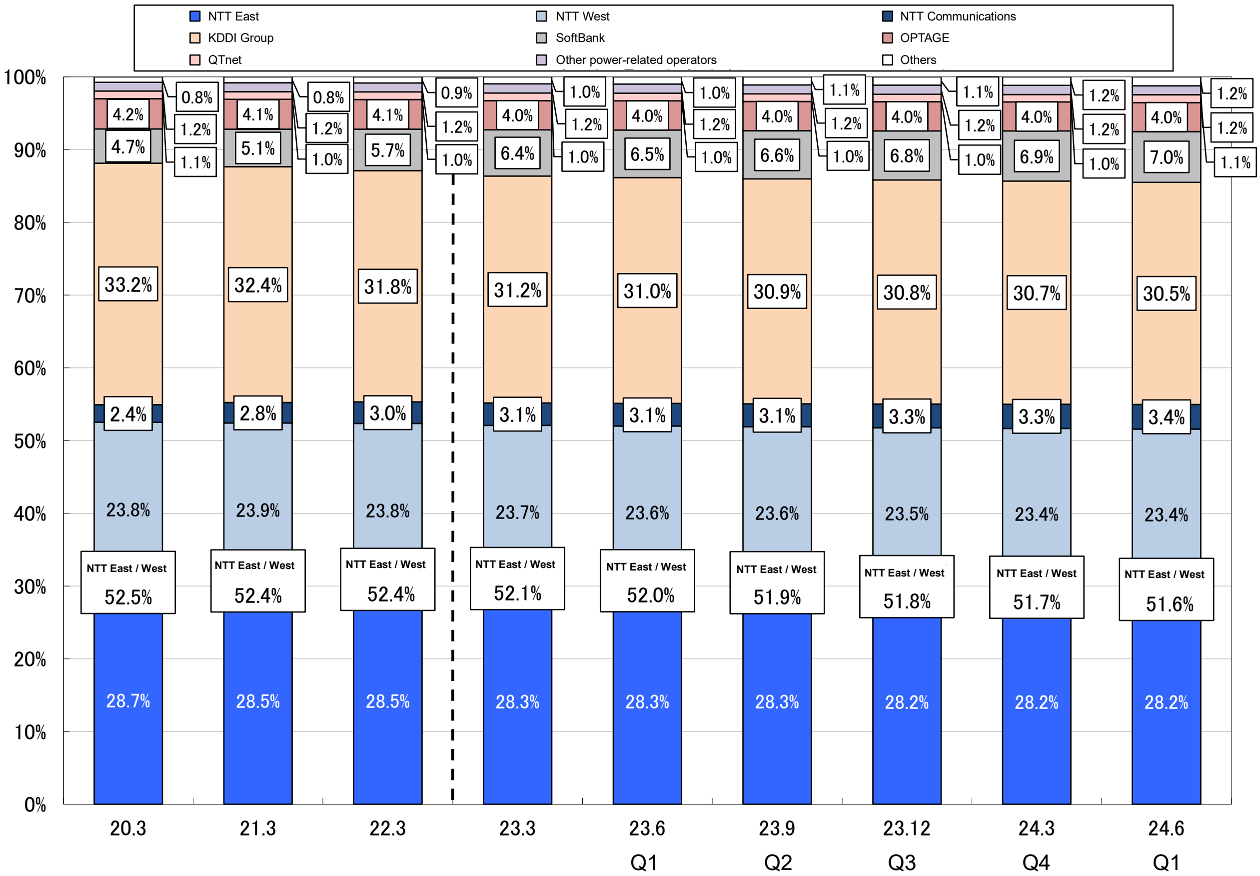
(Unit: 10,000 contracts)



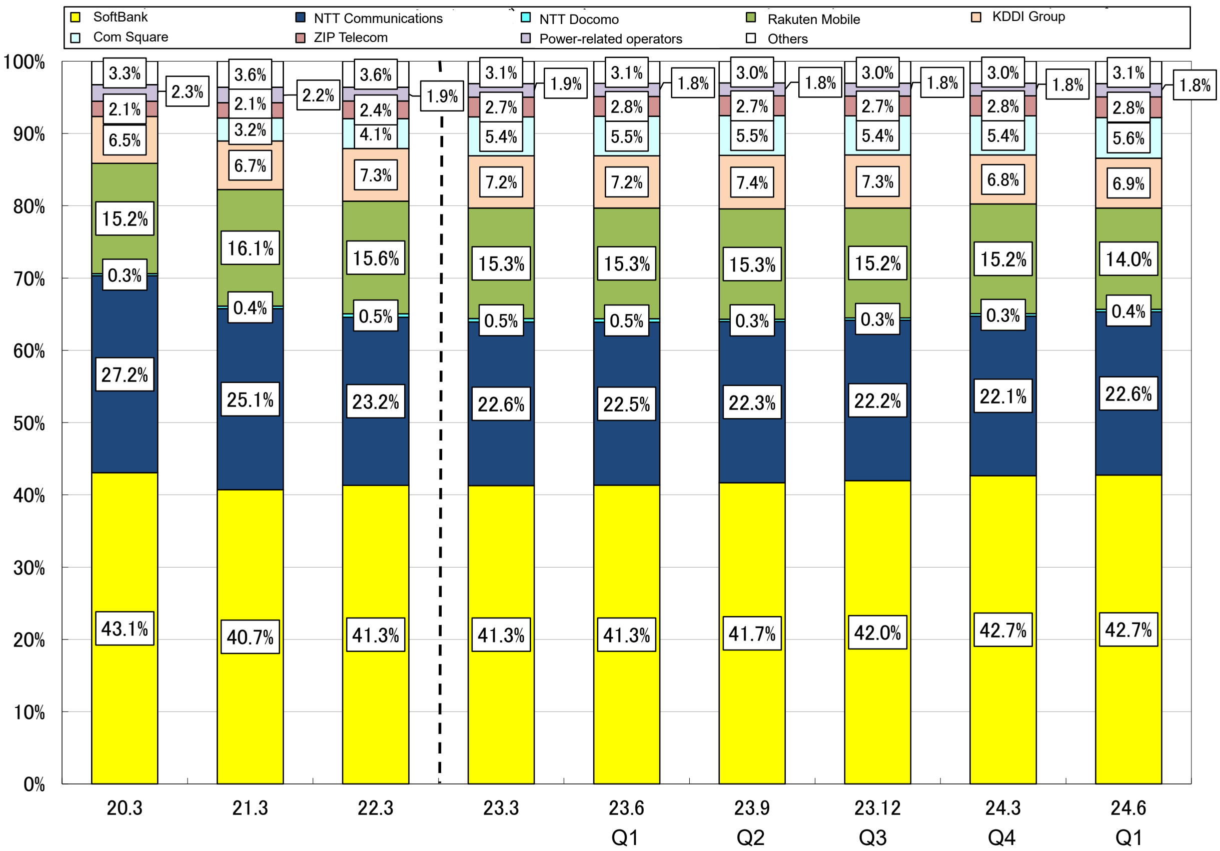
Changes in the share of IP phone numbers in use by operator (overall)



Changes in the share of IP phone numbers (0ABJ numbers) in use by operator



Changes in the share of IP phone numbers (050 numbers) in use by operator



Note 1: KDDI Group includes KDDI and Chubu Telecommunications.