

Preface

The world has experienced an economic downturn since late 2008. ICT (Information and Communications Technology) companies have developed new strategies to contribute to economic recovery into the future, despite the current difficult economic environment. These companies developed various prospective services and business models as well.

For example, the US President Obama's "Green New Deal" and other Global Warming initiatives have started to get a lot of attention from the public. In Japan, the "Green IT" and "Smart Grid" initiatives rely heavily on ICT technologies. These initiatives have started to move into high gear during 2009.

ICT companies are promoting higher-speed broadband facilities. These facilities include both FTTH (Fiber-To-The-Home) services including NGN (Next-Generation Networks), and mobile broadband services that start in 2010. Many companies announced new upper layer services using the higher-speed infrastructure.

In mobile communications business, it would be safe to say that 2009 is the year of "Application Store" boom, where it has become more common to purchase from "Net Shops." These "Net Shops" provide games and utility-software for cellular terminals. The trend may ultimately change the criteria to select carriers and terminal equipment from traditional monthly payment or payment dependent on terminal features to what service and software are available to the user.

In "Mobile Content" market including "Net Shops," the growth of "Music Distribution" slowed down, while "Mobile e-Book" market including "e-Comics" and "Mobile Video" are booming.

In fixed communications business, carriers are continuously seeking to enter higher-level layer business as a new revenue source: in particular, SaaS (Software as a Service), "Cloud Computing," and "Data Center Business" for corporate users.

As mentioned above, in 2009 a variety of players including telecom carriers developed and geared up new services and business models utilizing their fortes

over the telecom infrastructure. The move shall become faster and larger in scale because available content, software, and services will increase and mobile and fixed broadband infrastructure will develop.

The government set 2010 as the final year of a project to solve “Broadband Zero” (or to solve digital-divide). The change in political leadership has delayed the execution of the supplementary budget that affected somewhat on the strategy. The broadband infrastructure is the basis for these higher-level layer activities, a highly effective service in terms of economic ripple effect, apart from concrete-based public works. Accordingly, public finance capital shall continue to be increased as part of the economic stimulus plan.

The year 2010 shall be the last year before terrestrial broadcast digitization completes in 2011. During the year, terrestrial digital broadband broadcast and both mobile and fixed broadband services are expected to spread nationwide. The whole information including telecommunications, broadcasting, and content shall be digitized and transmitted through digital networks, potentially offering opportunities to develop new conversion services and conversion business models.

This publication introduces the latest trends in Info-Communications industry. Because ICT industry covers vast users and categories, involving various parties concerned, we do not believe this book covers all. The trends we have introduced here, however, shall be some hints to the ICT industry and eventually to Japanese economy in the process to the next growth steps. We hope this publication will play a role as a reference when you think of future ICT industry and Japan as a whole.

Lastly, I would like to express my thanks to various government institutions, ICT industry players, Corporate ICT department people, for their cooperations. I would also thank Mr. Lawrence J. Chu, a Telecommunications Consultant, for gladly accepting our request to work as the editorial supervisor for this publication.

March 2010

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