COMMUNICATIONS
INDUSTRY
ASSOCIATION
OF
JAPAN

CIAJ YEARBOOK 2001

CIAJ

Communications Industry Association of Japan

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YEARBOOK 2001

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Communications Industry Association of Japan

Tadashi Sekizawa
Chairman



Message from the Chairman

The Japanese economic climate in 2000 seemed to show signs of fairer weather ahead, but towards the end of the year, the cloud cover became thicker, and we are now again facing harsh conditions. However, IT is the key technology which will improve business, lifestyles, and the overall society of the 21st century and will still heve the important role to stimulate the Japanese economy and industries.

As the use of IT has increased the pace of business, cut costs, and created a more competitive environment, we are seeing the spinning off of some business activities while at the same time, different companies are cooperating to jointly handle overlapping functions. These changes in the use of IT are having an immense impact on the society and individual activities, and have the potential to determine Japan's overall global competitiveness. In this respect, countries throughout the globe are making changes in organizational structure, policies and regulations in order to take the maximum advantage of what IT has to offer.

This March, the Japanese government launched the "e-Japan Priority Policy Program," accelerating the creation of infrastructure and supporting policies for Japan to become a leading IT nation. Telecommunications carriers are also continuing their efforts to provide broadband services, using fiber, ADSL, and CATV, as well as next-generation mobile networks at low costs.

By providing value-added products and services in a speedy manner, CIAJ, which represents IT vendors, will strive for further growth of the industry and contribute to the realization of Japan's goal to become a leading IT nation.

We hope that this "CIAJ Yearbook 2001" will help you gain an understanding of CIAJ activities and Japan's telecommunication equipment industry.

Contents

Message from the Chairman 1

Profile of CIAJ 3
History 3
Mission 3
Activities 3
Members 3
Business Policy for FY2001 4

Organization 5
Top Executives 5
Directors 6
Auditors 6

List of Members 7

CIAJ Committees 8

International Activities at CIAJ 9

Profile of Japan's Telecommunications Equipment Industry 10
Production of Telecommunications Equipment 10
Export/Import of Telecommunications Equipment 11
Number of Subscribers to Mobile Phones 12
Number of Internet Host Computers in Japan 12
Number of DSL Service Users 13
Number of Subscribers Using Internet Connection Services that Utilize the CATV Network 13
Mid-Term Demand Forecast of Telecommunications Equipment 14

2000 Highlights 15
CEATEC JAPAN 2000: High Energy at the Booths of 748 Exhibitors 15
CIAJ Proposal: "Towards Realizing the IT Revolution" 17
7th Overseas Study Mission Report -Europe Moves Toward m-commerce 17

CIAJ Publications 20

CIAJ Website 21

CIAJ Secretariat 22

Profile of CIAJ

History

Established on April 20, 1948.

Mission

The CIAJ is committed to promoting the healthy development of manufacturing of telecommunications equipment and related business activities through the cooperative efforts of its members and thus improve standards of living and quality of life both domestically and overseas.

Activities

The following is an outline of major CIAJ activities:

- Compilation of studies and proposals
  Study and analyze global as well as domestic market and technology trends. Based on these findings, compile position papers and proposals on various relevant policies.
- Statistics and forecasts
  Compile production and trade statistics relevant to the industry.
  Prepare a mid-term demand forecast.
- Promotion of standards
  Create specifications and promote standardization by supporting interconnectivity tests.
- Promotion of telecommunication equipment
  Support widespread use of telecommunication equipment and their advanced uses.
  Promote deregulation and harmonized standardization activities on a global scale.
  Promote measures which improve product safety, QoS, and protection of the environment, such as recycling.
- Management and support of trade shows
  Management of CEATEC JAPAN.
  Support participation in overseas trade shows.

Members (as of July 1, 2001)

Regular membership is limited to companies that manufacture and supply telecommunications equipment in Japan, those engaged in related activities, and industy associations with membership made up of these companies. Supporting members are those that do not meet membership requirements, but support the mission of CIAJ and cooperate in its activities.

	No.	(foreign affiliates included)	
Regular members	**193**	**(18)**	U.S. 10, EU 8
Corporate members	191	(18)	
Organizations	2	(0)	
Supporting members	**24**	**(6)**	U.S. 1, EU 3, Korea 1, Singapore 1
Corporate members	17	(6)	
Organizations	7	(0)	
International Cooperation Partners	**11**	**(11)**	U.S. 1, Canada 1, EU 5, Korea 2, Hong Kong 1, Taiwan 1
Grand Total	**228**	**(35)**	

Business Policy for FY2001



CIAJ President
Yutaka Hayashi

The “e-Japan Priority Policy Program” was compiled as the basic IT strategy for Japan, aiming to become one of the most advanced IT nations in the world within five years by combining the efforts of both the public and private sectors.

CIAJ has taken this opportunity to closely review our role, and we have renewed our commitment to improve our ability to support member companies, making adjustments according to changes in our business environment, strengthening our capacity to implement business activities, conduct research, and make timely proposals.

Fiscal year 2001 will mark the start of third generation mobile services and various digital and IP-based broadband services, symbolized by ADSL and FTTH. These new services are expected to create new customer needs, providing ideal opportunities for our member companies to make significant inroads in global markets.

CIAJ will aggressively seek to understand these multi-faceted market trends, as it is of a common interest for all of our members. We will support their businesses by conducting timely studies, analyses, and presenting necessary proposals.

Standardization, environmental issues, product safety, terminal certification, accessibility, and interconnectivity assessment are some issues of increasingly social and global importance. Also of common interest to our members, CIAJ will continue to strengthen our alliances with relevant government offices and industry organizations.

CIAJ’s policy for business activities are based on the following five pillars.

(1) Adjusting to changes in technology and the market

- Conduct studies on market and technology trends (switch to broadband, e-commerce, IMT-2000, etc.)
- Take necessary measures in the switch to IP, convergence, and new growth areas (IP networks, spread of contents, security, etc.). Forge ties with telecommunications carriers and relevant organizations.
- Gather information on standardization, participate in the development of standards, and support interconnectivity tests (HATS).
- Compile statistics on telecommunications equipment and annual mid-term demand forecast.
- Support SMEs.

(2) Making our position known on economic and IT policies

- Make our position known on government policies and programs leading to the realization of an advanced IT nation.
- Provide information on policies concerning the industry, competition, deregulation, taxes, and other relevant issues to our members; Cooperate with other relevant industry organizations and make our position known on these issues.
- Promote studies and R&D which pertain to the technological competitiveness of the industry.

(3) Tackling global policy and trade issues

- Make our position known on measures to remove non-tariff trade barriers, such as MRA and SDoC.
- Gather data on potential future growth markets in India, Middle East, Latin and South America, and China, in accordance with member company interests.
- Strengthen relations with relevant organizations abroad with which CIAJ has a cooperation agreement, such as TIA (U.S.), AEA (U.S.), EICTA (EU), TEEMA (Taiwan), as well as with those connected with the Chinese info-communications industry.
- Exchange information and voice our opinions at international conferences such as ATIE, WEF, GTAC, GBDe, GPACS, ICSA

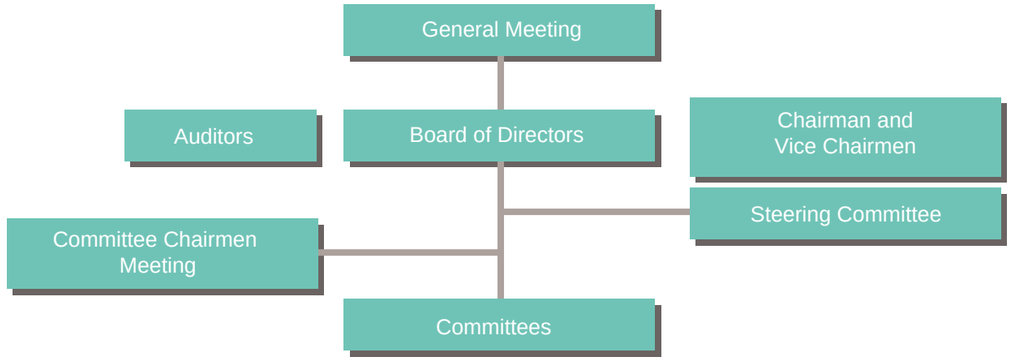
(4) Addressing issues of broad social impact influencing general quality of life

- Study and analyze recycling of telecommunications equipment, and other environmental issues (ex. disposal methods, energy conservation).
- Study and promote conformity assessment procedures, product safety, and quality management
- Promote accessibility of telecommunication facilities

(5) Conducting effective PR activities and providing relevant information to our members

- Oversee CEATEC JAPAN, the largest IT trade show in Japan, as a sponsoring organization.
- Assist participation in trade shows held in China.
- Various PR activities from a global perspective, including improving CIAJ website in order to provide more information

Organization



Top Executives (As of July 1, 2001)



Chairman
Tadashi Sekizawa
Chairman,
Fujitsu Ltd.



Vice Chairman
Katsumasa Shinozuka
President & CEO,
Oki Electric Industry Co., Ltd.



Vice Chairman
Etsuhiko Shoyama
President & Director,
Hitachi, Ltd.



Vice Chairman
Yasuo Katsura
President,
Matsushita Communication Industrial Co., Ltd.



Vice Chairman
Ichiro Taniguchi
President & CEO,
Mitsubishi Electric Corp



Vice Chairman
Tadashi Okamura
President & CEO,
Toshiba Corporation



Vice Chairman
Kouji Nishigaki
President,
NEC Corporation



President
Yutaka Hayashi
President,
CIAJ

Directors (As of July 1, 2001)

The Board of Directors is comprised of the following directors as well as top executives

Hiroshi Okazaki	Senior Vice President, CIAJ
Yasuo Nakagawa	Chairman, Anritsu Corp
Masao Motohashi	President, Ando Electric Co., Ltd.
Kuniaki Ohara	President, Iwatsu Electric Co., Ltd.
Seizaburou Murata	President, Oi Electric Co., Ltd.
Akira Taguchi	Chaiman, Ohkura Electric Co., Ltd.
Toshihiko Kawai	President, Kanda Tsushin Kogyo Co., Ltd.
Fujio Mitarai	President & CEO, Canon Inc.
Yasuo Nishiguchi	President, Kyocera Corporation
Yukinori Kuwano	President & CEO, Sanyo Electric Co., Ltd.
Katsuhiko Machida	President, Sharp Corp.
Taimei Takasaki	President, Shindengen Electric Mfg. Co., Ltd.
Nobuyuki Idei	Chairman & CEO, Sony Corporation
Susumu Harashima	President, Taiko Electric Works, Ltd.
Shuji Asuma	President & Representative Director, Takamisawa Electric Co., Ltd.
Naoki Tamura	President, Tamura Corporation
Masanori Yoshioka	President, Tamura Electric Works, Ltd.
Shigeo Sasaki	President, Japan Industrial Association for Telecommunications Equipment and Materials
Toru Mikami	Representative Director Deputy Chairman, Densei-Lambda K.K.
Toshio Soejima	President & Representative director, Toyo Communication Equipment Co., Ltd.
Hisayoshi Takeuchi	President, Nakayo Telecommunications, Inc.
Masao Toka	President, NEC Infrontia Corporation
Masami Shinozaki	President, Japan Aviation Electronics Industry, Ltd.
Hiroshi Yokomizo	President, Japan Radio Co., Ltd.
Norio Murakami	President and Representative Director, Nortel Networks Corporation
Yukio Kawamoto	President, Hitachi Telecom Technologies, Ltd.
Makoto Endo	President & CEO, Hitachi Kokusai Electric Inc.
Hideki Sakai	Chairman, Hirose Electric Co., Ltd.
Masamoto Sakamoto	President, Fuji Xerox Co., Ltd.
Satoshi Sugimoto	President, Fujitsu I·Network Systems Limited
Kiyoshi Tomimori	President, Fujitsu Denso Ltd.
Kunio Nakamura	President, Matsushita Electric Industrial Co., Ltd.
Nobutane Yamamoto	President, Matsushita Graphic Communication Systems, Inc.
Korehisa Ueda	President, Meisei Electric Co., Ltd.
Isamu Kuru	President, Motorola Japan Ltd.
Isao Uchida	President & CEO, Yokogawa Electric Corporation
Masamitsu Sakurai	President, Ricoh Co., Ltd.

Auditors

Shinji Matsumoto	Chairman, Nihon Dengyo Kosaku Co., Ltd.
Kazuo Nishiyama	President, Miyakawa Electric Works, Ltd.

Director of Kansai Office

Shinji Kurahashi	President, Kurahashi Electric Works, Ltd.

List of Members (As of July 1, 2001. All names have been capitalized)

Regular Members
(193 companies/organizations)

ACTERNA CORPORATION
AD SYSTEMS. CORPORATION
ADVANTEST CORPORATION
AIPHONE, CO., LTD.
AISIN SEIKI CO., LTD.
AIWA CO., LTD.
ALCATEL JAPAN LTD.
ALEXON CO., LTD.
ALPS ELECTRIC CO., LTD.
ANDO ELECTRIC CO., LTD.
ANRITSU CORPORATION
ASABA MANUFACTURING CO., LTD.
ASAHI TELE-COMMUNICATION MACHINERY MFG. CO., LTD.
BROTHER INDUSTRIES, LTD.
BT JAPAN K.K.
CANON INC.
CANON SALES CO., INC.
CASIO COMPUTER CO., LTD.
CHIYODA ELECTRIC CO., LTD.
CHUKO ELECTRIC CO., LTD.
CHUO ELECTRIC WORKS, CO., LTD.
COMPAQ COMPUTER K.K.
CONEXANT SYSTEMS JAPAN CO., LTD.
CORNING INTERNATIONAL K.K.
DAITO COMMUNICATION APPARATUS CO., LTD.
DDK LTD.
DENKI KOGYO CO., LTD.
DENSEI LAMBDA K.K.
DENSO CORPORATION
DEUTSCHE TELEKOM K.K.
FDK CORPORATION
FUJI ELECTRIC CO., LTD.
FUJI GOSEI K.K.
FUJI PHOTO FILM CO., LTD.
FUJI XEROX CO., LTD.
FUJIKURA CO., LTD.
FUJITSU DENSO LTD.
FUJITU I • NETWORK SYSTEMS LTD.
FUJITSU LIMITED
FUJITSU TAKAMISAWA COMPONENT LIMITED
FUNAI ELECTRIC CO., LTD.
THE FURUKAWA BATTERY CO., LTD.
THE FURUKAWA ELECTRIC CO., LTD.
HACHIKO DENKI CO., LTD.
THE HAKUSAN MFG. CO., LTD.
HANSHIN TSUSHIN KOGYO CO.,LTD.
HASHIMOTO CORPORATION
HEIWA ELECTRIC INDUSTRIES CO., LTD.
HIROSE ELECTRIC CO., LTD.
HITACHI KOKUSAI ELECTRIC INC.
HITACHI HOMETEC, LTD.
HITACHI TELECOM TECHNOLOGIES, LTD.
HITACHI, LTD.
HONDA TSUSHIN KOGYO CO., LTD.
IBM JAPAN, LTD.
INTERPHONE INDUSTRY ASSOCIATION OF JAPAN
INTER-TEL JAPAN, INC.
IRIICHI TECHNOROGIES INC.
ISHIZUKA ELECTRONICS CORPORATION
ITEC CORPORATION
IWATSU ELECTRIC CO., LTD.
JAPAN AVIATION ELECTRONICS INDUSTRY, LTD.
JAPAN INDUSTRIAL ASSOCIATION FOR TELECOMMUNICATIONS EQUIPMENT AND MATERIALS
JAPAN RADIO CO., LTD.
JAPAN STORAGE BATTERY CO.,LTD.
KAGA, INC.
KANDA TSUSHIN KOGYO CO., LTD.
KAWAGUCHI ELECTRIC WORKS CO., LTD.
KENWOOD CORPORATION
KINASHI DENKI SEISAKUSYO CO., LTD.
KINKI DENKI CO., LTD.
KITAGAWA INDUSTRIES CO., LTD.
KOKUNAI TSUSHO COMPANY LIMITED
KONICA CORPORATION
KOYO ELECTRIC CO., LTD.
KURAHASHI ELECTRIC WORKS, LTD.
KYOCERA CORPORATION
KYOCERA MITA CORPORATION
KYOSAN ELECTRIC MFG. CO., LTD.
KYUSHU MATSUSHITA ELECTRIC CO., LTD.
LPL. CO., LTD.
LUCENT TECHNOLOGIES JAPAN LTD.
MARANTZ JAPAN INC.
MATSUDA MFG. CO., LTD.
MATSUSHITA COMMUNICATION INDUSTRIAL CO., LTD.
MATSUSHITA ELECTRIC INDUSTRIAL CO., LTD.
MATSUSHITA ELECTRIC WORKS LTD.
MATSUSHITA GRAPHIC COMMUNICATION SYSTEMS, INC.
MEGASOFT INC.
MEIDENSHA CORPORATION
MEISEI ELECTRIC CO., LTD.
MINOLTA CO., LTD.
MITSUBISHI ELECTRIC CORPORATION
MITSUMI ELECTRIC CO., LTD.
MIYA ELECTRIC CO., LTD.
MIYAKAWA ELECTRIC WORKS, LTD.
MOLEX JAPAN CO., LTD.
MOTOROLA JAPAN LTD.
MURATA MACHINERY, LTD.
MURATA MANUFACTURING CO., LTD.
NAGAMURA MFG. CO., LTD.
NAGASAWA ELECTRIC WORKS, LTD.
NAKAYO TELECOMMUNICATIONS, INC.
NASU DENKI TEKKO CO., LTD.
NEC CORPORATION
NEC INFRONTIA CORPORATION
NIHON DENGYO KOSAKU CO., LTD.
NIKKO ELECTRIC WORKS,CO., LTD.
NIPPON ERICSSON K.K.
NIPPON TSUSHIN KOKAN CO., LTD.
NISHIYAMA CORPORATION
NISHIZAWA MFG, CO., LTD.
NISSHIN ELECTRIC CO., LTD.
NISSIN ELECTRIC CO., LTD.
NOKIA JAPAN CO.,LTD.
NORTEL NETWORKS JAPAN
NTT ADVANCED TECHNOLOGY CORPORATION
NTT ELECTRONICS CORPORATION
NTT SOFTWARE CORPORATION
NTT TELECA CORPORATION
OHIZUMI MFG. CO., LTD.
OHKURA ELECTRIC CO., LTD.
OI ELECTRIC CO., LTD.
OKI COMMUNICATION SYSTEMS CO.,LTD.
OKI DATA CORPORATION
OKI ELECTRIC INDUSTRY CO.,LTD.
ORIGIN ELECTRIC CO., LTD.
OSAKI ELECTRIC CO., LTD.
PIONEER COMMUNICATIONS CORPORATION
PIONEER ELECTRONIC CORPORATION
RICOH CO., LTD.
SANKEN ELECTRIC CO., LTD.
SANKOSHA CORPORATION
SANKYU ELECTRONICS CORPORATION
SANRITZ CORPORATION
SANWA DENKI KOGYO CO., LTD.
SANYO DENKI CO., LTD.
SANYO ELECTRIC CO., LTD.
SEIKO EPSON CORPORATION.
SEKISUI CHEMICAL CO.,LTD.
SENDA MFG. CO., LTD.
SHARP CORPORATION
SHINDENGEN ELECTRIC MFG. CO., LTD.
SHINKO SEISAKUSHO CO., LTD.
SHINKO TECHNOMIST CO.
SHIN-KOBE ELECTRIC MACHINERY CO., LTD.
SIEMENS K.K.
SINANO ELECTRIC CO., LTD.
SMK CORPORATION
SONY CORPORATION
SPC ELECTRONICS CO., LTD.
STANLEY ELECTRIC CO.,LTD.
SUMIDEN HIGH PRECISION CO., LTD.
SUMITOMO ELECTRIC HIGHTECHS CO., LTD.
SUMITOMO ELECTRIC INDUSTRIES, LTD.
SYSNET, CO., LTD.
TAIEI MANUFACTURING CO., LTD.
TAIKO ELECTRIC WORKS, LTD.
TAJIMI ELECTRONICS CO., LTD.
TAKACHIHO SANGYO CO., LTD.
TAKACOM CORPORATION
TAKAMISAWA ELECTRIC CO., LTD.
TAKAOKA ELECTRIC MFG. CO.,LTD.
TAKIGEN MFG. CO., LTD.
TAMACHI ELECTRIC INDUSTRY CO.,LTD.
TAMURA CORPORATION
TAMURA ELECTRIC WORKS, LTD.
TERADA ELECTRIC WORKS CO., LTD.
TOA TSUSHIN KOZAI CO., LTD.
TOCHIGIYA CO., LTD.
TOEI ELECTRIC INDUSTRY CO., LTD.
TOKAI COMMUNICATION INDUSTRY CO., LTD.
TOKAI FRUEHAUF CO., LTD.
TOKAI KAGAKU KOGYO CO., LTD.
TOKIN CORPORATION
TOKO, INC
TOKURIKI SEIKO CO., LTD.
TOKYO COMMUNICATION EQUIPMENT MFG. CO., LTD.
TOMEI TSUSHIN KOGYO CO., LTD.
TOSHIBA CORPORATION
TOSHIBA TEC CORPORATION
TOTSU-SOKEN CORPORATION
TOYO COMMUNICATION EQUIPMENT CO.,LTD.
TOZAN ELECTRIC CO.,LTD.
VICTOR CO. OF JAPAN, LTD.
WATANABE CO., LTD.
YAMAHA CORPORATION
YAMAKI ELECTRIC CORPORATION
YAMAKO ELECTRIC MANUFACTURE CO.
YANMAR DIESEL ENGINE CO., LTD.
YAZAKI CORPORATION
YOKOGAWA ELECTRIC CORPORATION
YUASA CORPORATION

Supporting Members
(24 companies/organizations)

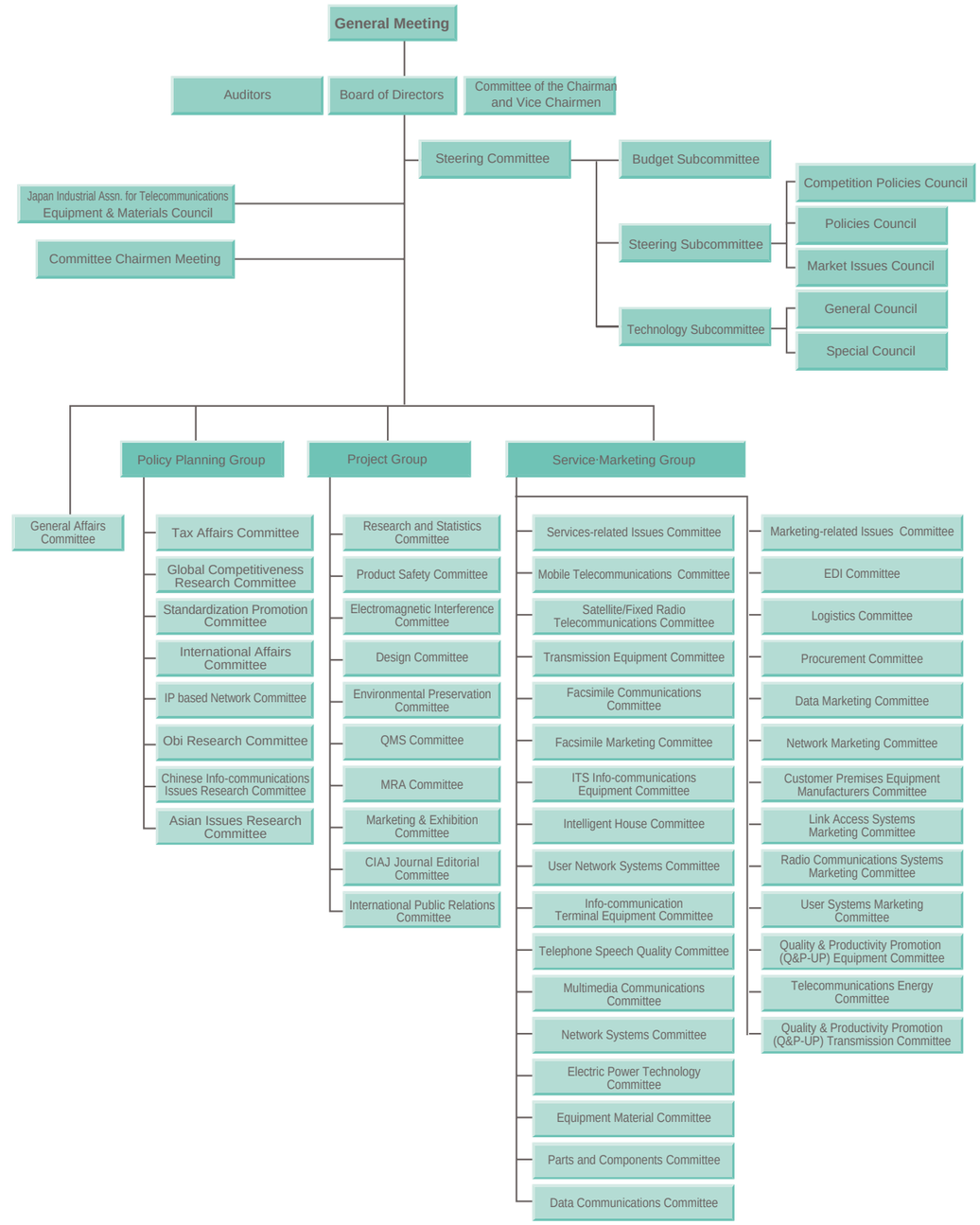
AGILENT TECHNOLOGIES CO., LTD.
CORNES AND CO., LTD.
DIALOGIC SYSTEMS K.K.
ELECTRONIC MATERIALS MANUFACTURERS ASSOCIATION OF JAPAN
ETO CO., LTD.
INFOCOM CORPORATION
INFORMATION & TELECOMMUNICATION EQUIPMENT CONSTRUCTOR'S ASSOCIATION
JAPAN APPROVALS INSTITUTE FOR TELECOMMUNICATIONS EQUIPMENT
JAPAN ELECTRONICS AND INFORMATION TECHNOLOGY INDUSTRIES ASSOCIATION
JAPAN PERSONAL COMPUTER SOFTWARE ASSOCIATION
JSAT CORPORATION
KANTO TSUSHINYUSO K.K.
KRONE JAPAN K.K.
KVH TELECOM CO.,LTD.
LG INFORMATION & COMMUNICATIONS, LTD.
MANSEI KOGYO CO., LTD.
MOBLE COMMUNICATIONS TOKYO, INC.
NIHON UNISYS, LTD.
NIPPON ZOKEISHA LTD.
NTT AUTO LEASING CO., LTD.
RELIABILITY CENTER FOR ELECTRONIC COMPONENTS OF JAPAN
SENJU METAL INDUSTRY CO., LTD.
TANAKA KIKINZOKU KOGYO K.K.
TRON ASSOCIATION

International Cooperation Partners (11 organizations)

Please refer to page 9.

CIAJ Committees

The Communications Industry Association of Japan is headed by the Chairman (2-year term of office), who is selected at the General Meeting. The General Meeting is the highest decision making body of CIAJ. Important decisions concerning everyday activities are determined by a vote of the Board of Directors. There are fifty-five Committees composed of experts from the various member companies. These committees conduct numerous activities, including deliberation of various issues and work towards the creation of an appropriate business environment. In addition, CIAJ also serves as the Secretariat for the Japan Multimedia Forum (JMF: approximately 170 members), which promotes the spread of multimedia throughout society.



International Activities at CIAJ

International Cooperation Partners

CIAJ has an International Cooperation Partner relation with the following info-communications industry organizations in various countries. Through various activities, we aim to strengthen global exchanges.

Continent	Country/Area	Organization	Acronym
North America	Canada	CATA Alliance	CATA
	U.S.A.	Telecommunications Industry Association	TIA
Europe	Denmark	Danish Electronics Industry Association	EI
	Europe	European Information and Communications Technology Industry Association	EICTA
	Finland	Federation of Finnish Electrical and Electronics Industry	SET
	France	Syndicat National des Enterprises de Sous-Traitance Electronique	SNESE
	Germany	Fachverband Informationstechnik im VDMA und ZVEI German Information Technology Industry Association	FVIT
Asia	Hong Kong	Internet & Telecom Association of Hong Kong	ITAHK
	Korea	Korea Association of Information & Telecommunication	KAIT
	Korea	Korea Radio Promotion Association	RAPA
	Taiwan	Taiwan Electrical And Electronic Manufacturers' Association	TEEMA

Scheduled International Conferences for 2001

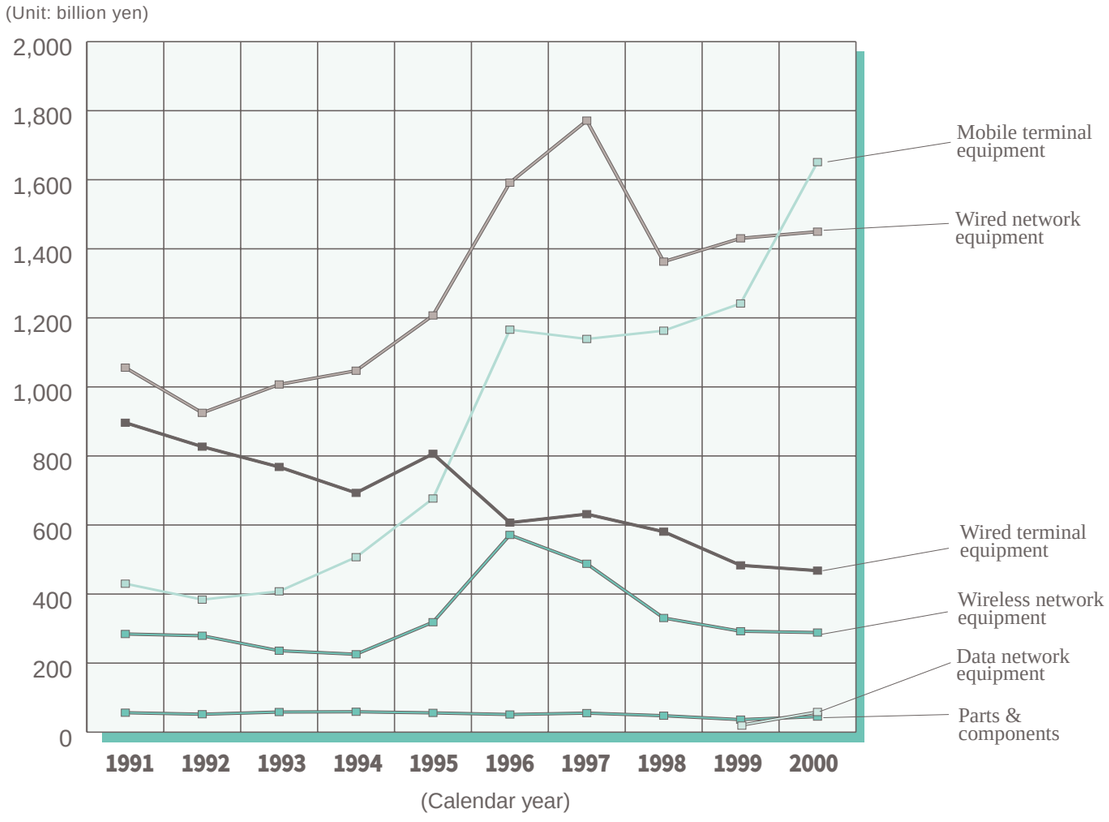
CIAJ actively participates in the following international conferences. (In alphabetical order)

Conference	Details	Place	Date
APEC(Asia-Pacific Economic Cooperation) : TEL WG/MRA Taskforce	24th TEL Meeting	Jeju, Korea	September 17-21, 2001
ATIE(Asian Telecommunications Industry Exchange)	7th ATIE	Seoul, Korea	May 8-11, 2001
CISPR(Comite International Special des Perturbations Radioelectrique)	Meeting in Bristol	Bristol, UK	June 18-29, 2001
ECMA(European Computer Manufacturers Association): TC12 - Product safety	TC12 Meeting	EU	June, 2001
GBDe(Global Business Dialogue on Electronic Commerce)	3rd GBDe	Tokyo, Japan	September 13-14, 2001
GPCAS(Global Product Conformity Asssessment System)	3rd GPCAS	Not settled	September or October, 2001
GTAC(Global Telecommunications Action Committee)	3rd GTAC	Rio de Janeiro, Brazil	November 28, 2001
ICSCA(Industry Cooperation on Standards & Conformity Assessment)	ICSCA VIII Meeting	Berlin, Germany	September, 2001
IEC(International Electrotechnical Commission) : TC74 -Safety and energy efficiency of IT equipment	TC74 Meeting	Las Vegas, USA	April 18-20, 2001
	TC12 Meeting	Washington, USA	November, 2001
ITU-T(ITU Telecommunication Standardization Sector)	Not settled	———	———
WEF(World Electronics Forum)	7th WEF	Rio de Janeiro, Brazil	November 26, 2001

Profile of Japan's Telecommunications Equipment Industry

Production of Telecommunications Equipment

The value of telecommunications equipment produced in Japan in 2000 was 3.9605 trillion yen. This was a 13.0% increase over the previous year. There was a large increase in production of mobile terminal equipment, concentrated in IP cellular phones, as well as increases in wired network equipment resulting from investment growth among telecom carriers in infrastructure. Production of data network equipment to supply demand stemming from the popularity of the Internet also increased.



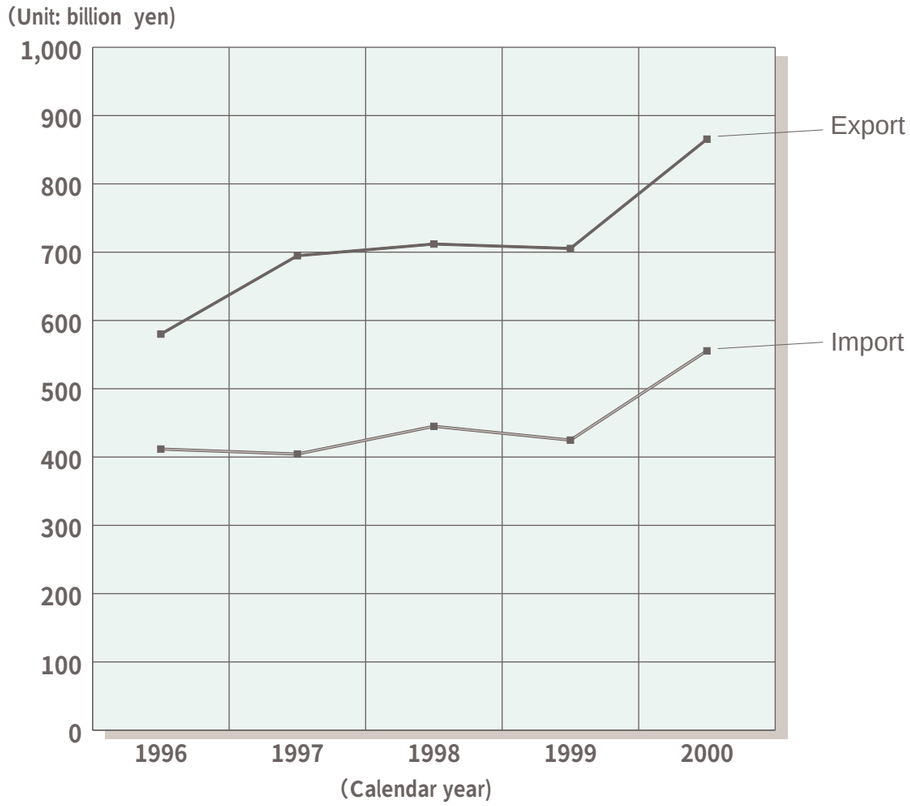
(Unit: billion yen)

Equipment type \ Calendar year	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Telecommunications Equipment	2,722.7	2466.8	2,477.3	2,531.3	2,878.2	3,986.6	4,084.6	3,484.4	3,503.9	3,960.5
Wired terminal equipment	896.3	826.9	768.1	693.0	620.3	606.8	631.6	580.6	483.2	467.8
Mobile terminal equipment	430.0	383.9	407.9	506.8	676.7	1,165.7	1,138.9	1,162.8	1,241.7	1,651.2
Wired network equipment	1,055.8	924.9	1,007.1	1,046.9	1,207.0	1,591.7	1,771.3	1,362.8	1,430.4	1,449.6
Wireless network equipment	284.3	279.2	235.9	225.6	318.5	571.2	487.7	330.6	292.3	288.5
Data network equipment	—	—	—	—	—	—	—	—	20.0	58.4
Parts & components	56.3	51.9	58.3	59.0	55.8	51.1	55.2	47.6	36.3	45.0

Source: "Dynamic Statistics of Production", Ministry of Economy, Trade and Industry
Note: The categorization of data network equipment (routers, hubs, other) and terminal adapters under wired terminal equipment have been added since January, 1999.

Export/Import of Telecommunications Equipment

The total value of exports of telecommunications equipment in 2000 was 865.5 billion yen, amounting to a significant growth of 22.7% over the previous year. With the exception of "others," all regions showed growth: 8.7% to North America, 77.0% to Europe, and 34.2% to Asia.
The total value of imports of telecommunications equipment in 2000 was 555.5 billion yen, a 30.8% increase over the previous year. Imports grew from all regions, with 25.4% from North America, 17.5% from Europe, and 54.9% from Asia.



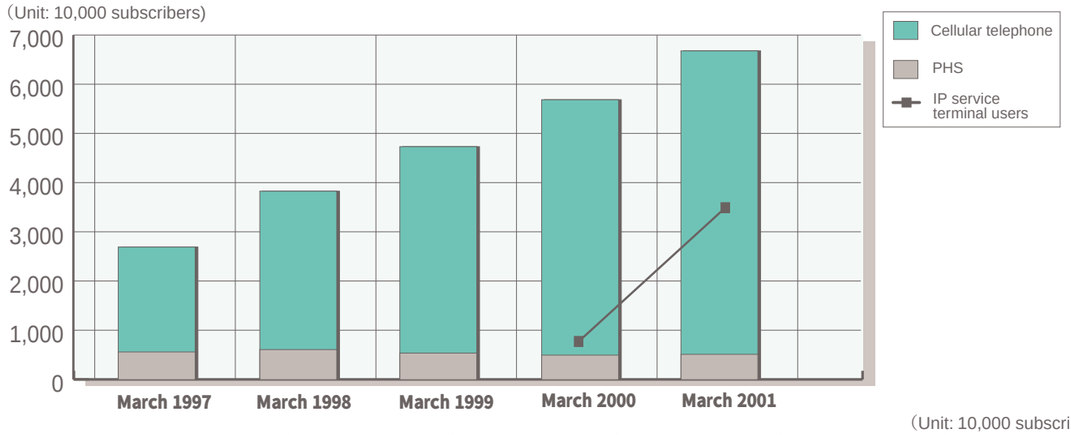
(Unit: billion yen)

Statistical categorization/region \ Calendar year	1996	1997	1998	1999	2000
Export	580.0	694.8	711.9	705.4	865.5
North America	191.1	216.4	271.8	394.4	426.5
Europe	124.8	137.8	141.2	108.1	191.3
Asia	183.8	231.6	182.7	139.6	187.4
Others	80.3	109.1	116.1	63.3	60.3
Import	411.7	404.4	445.0	424.8	555.5
North America	180.4	194.1	254.8	221.4	277.7
Europe	102.0	80.4	64.9	99.9	117.4
Asia	125.3	127.3	122.2	97.5	151.0
Others	4.0	2.6	3.1	6.0	9.4

Source: "Trade Statistics," Ministry of Finance

Number of Subscribers to Mobile Phones

Internet-compatible cellular phones are continuing to gain popularity. The “i-mode” service begun by NTT DoCoMo in February 1999 already has over 21.7 million subscribers. Together with similar services provided by other carriers, there are 34.57 subscribers to Internet mobile services as of March 2001, or 57% of all cellular subscribers.



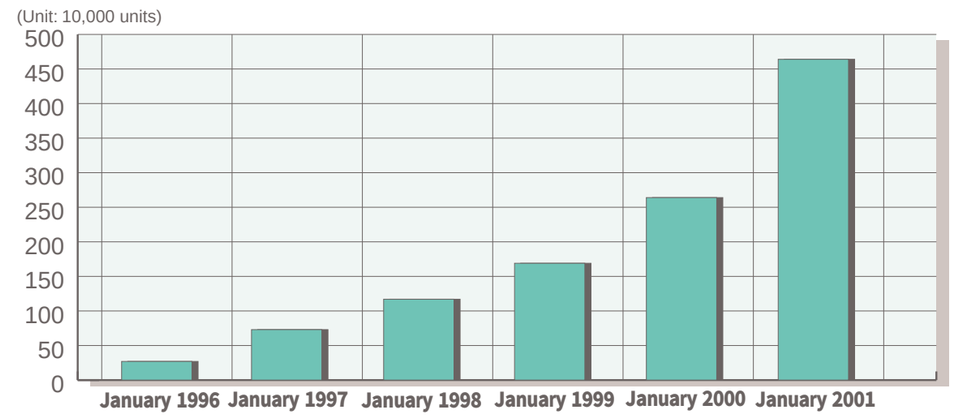
(Unit: 10,000 subscribers)

Equipment type \ Year/month	March 1997	March 1998	March 1999	March 2000	Marchf 2001
Total	2,691	3,826	4,731	5,685	6,678
Cellular telephone	2,088	3,153	4,153	5,114	6,094
IP service terminal users	–	—	—	750	3,457
PHS	603	673	578	571	584

Source: Ministry of Public Management, Home Affairs, Posts and Telecommunications

Number of Internet Host Computers in Japan

The number of host computers in Japan is growing at an explosive rate, fueled by the switch to broadband connections. It reached 4.64 million in January 2001, which is seventeen times the total in January, 1996. This figure is second only to America.



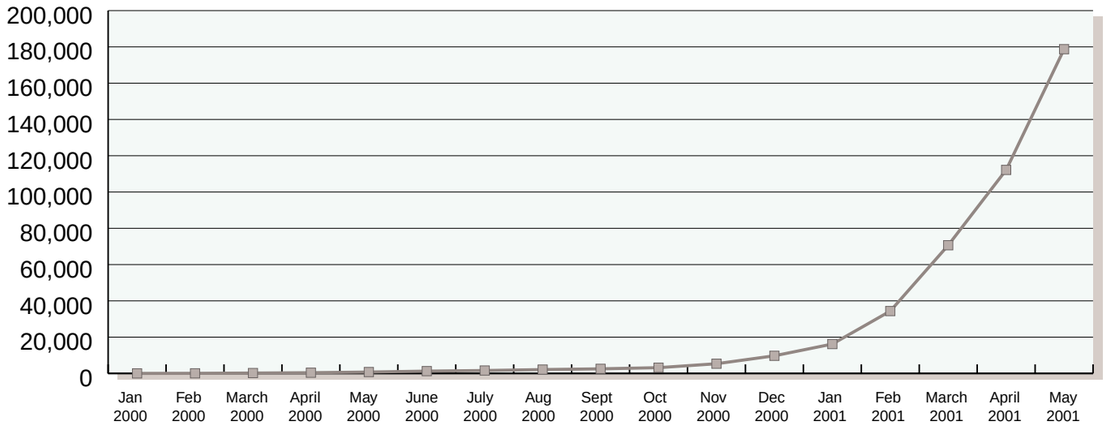
(Unit: 10,000 units)

Year/month	January 1996	January 1997	January 1998	January 1999	January 2000	January 2001
No. of Internet host computers	27	73	117	169	264	464

Source: Network Wizards

Number of DSL Service Users

According to figures released by the Ministry of Public Management, Home Affairs, Posts and Telecommunications, there were 178,737 DSL lines in service as of the end of May 2001, a 150% increase over the previous month. In October 2000, there was a little over 3,000 DSL lines, translating into a fifty fold growth in just five months.

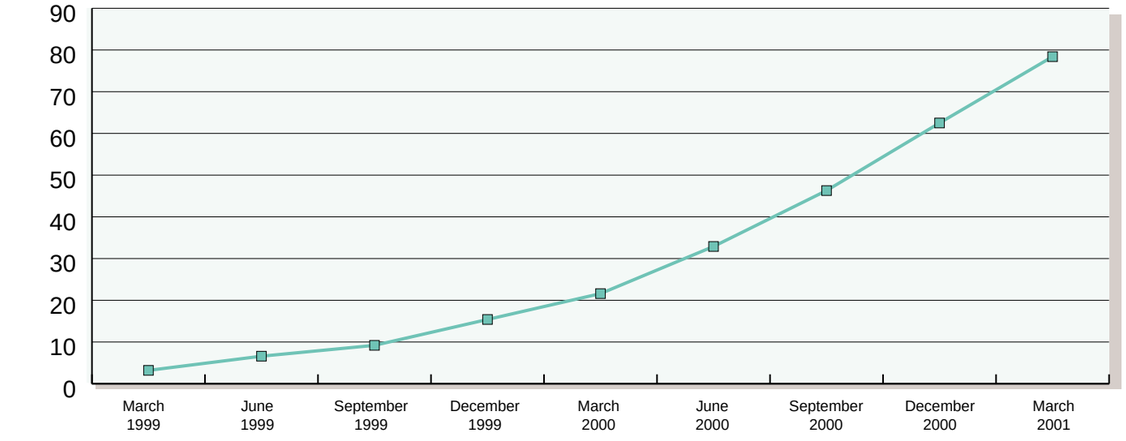


		Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Users (subscribers)	2000	19	62	211	399	760	1,272	1,605	2,122	2,537	3,171	5,347	9,723
	2001	16,194	34,372	70,655	112,182	178,737							

Source: Ministry of Public Management, Home Affairs, Posts and Telecommunications
Note: The number of subscribers to the DSL Connection Services offered by the NTT regional companies.

Number of Subscribers Using Internet Connection Services that Utilize the CATV Network

(Unit: 10,000 Subscrivers)



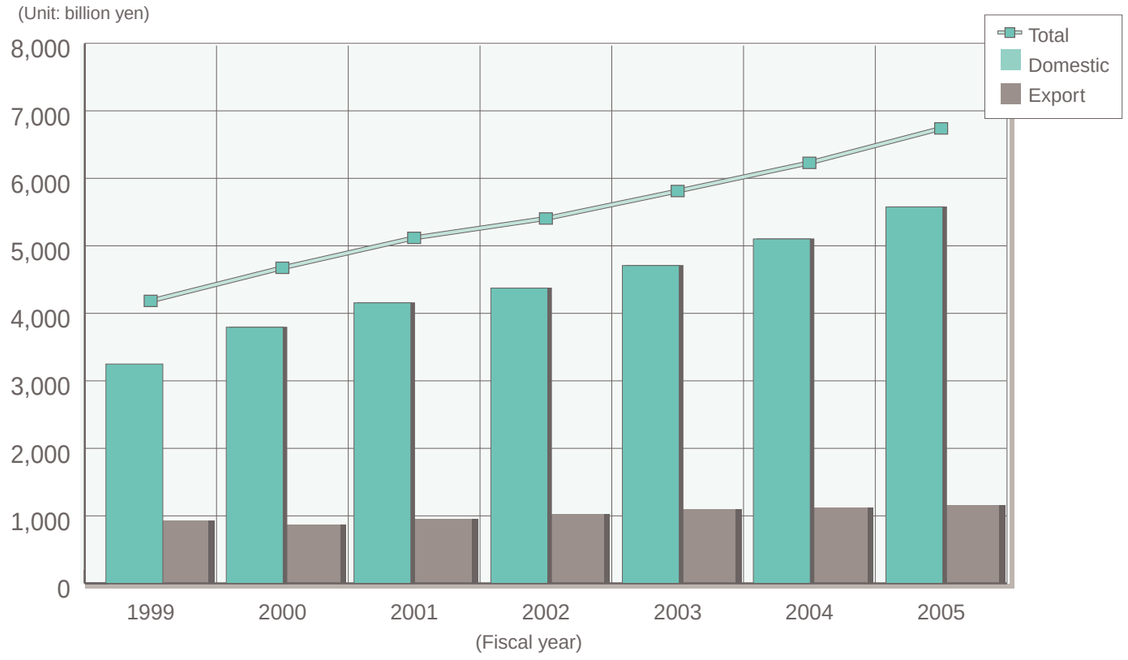
		March	June	September	December
Subscribers (Unit: 10,000)	1999	3.2	6.6	9.2	15.4
	2000	21.6	32.9	46.3	62.5
	2001	78.4			

Source: Ministry of Public Management, Home Affairs, Posts and Telecommunications
Note: Subscribers include those occasionally using a dial-up line.
Includes the number of lines of Internet connection providers whose sole role is to offer the lines.

Mid-Term Demand Forecast of Telecommunications Equipment

The telecommunications equipment market in fiscal year 2000 is expected to have increased. This was based on domestic growth forecast of 16.8% as a result of demand growth in Internet-related equipment, explosive popularity of IP cellular phones, demand growth from telecom carriers investing in ISDN infrastructure and preparing for competition in the local market, and procurement related to commencement of IMT-2000 services among other factors. However, the figure for exports was forecast to decrease, with continued transfer of manufacturing facilities to other countries and slower exports to America.

In fiscal year 2001 and beyond, use of mid- to high-speed access networks, their switch to optic fiber, and widespread popularity of mobile Internet are expected and we have forecast an average rate of growth from fiscal years 1999 to 2005 to be a healthy 8.3%.



(Unit: billion yen)

Type of demand / market field \ Fiscal year			Value of orders received・shipped							99-05 Average annual change (%)
			Actual	Forecast						
			1999	2000	2001	2002	2003	2004	2005	
Total			4,181.2	4,671.6	5,115.0	5,401.8	5,808.7	6,226.4	6,736.4	8.3
Type of demand		Domestic	3,249.3	3,794.4	4,156.1	4,374.5	4,708.5	5,102.5	5,577.3	9.4
		Export	931.9	877.2	958.9	1,027.3	1,100.2	1,123.9	1,159.1	3.7
Market field		Consumer	345.1	339.2	336.3	329.9	321.7	314.1	306.6	▲ 2.0
		Business	550.2	537.8	542.4	553.1	569.2	580.4	591.6	1.2
		Mobile	1,292.3	1,638.5	1,769.3	1,889.1	2,005.4	2,111.7	2,233.0	9.5
		Infrastructure	1,645.6	1,685.0	1,808.5	1,866.1	2,031.0	2,233.0	2,503.0	7.2
		Internet	348.0	471.1	658.5	763.6	881.4	987.2	1,102.2	21.2

Source: CIAJ"FY2000 Mid-Term Demand Forecast of Telecommunications Equipment"

CEATEC JAPAN 2000: High Energy at the Booths of 748 Exhibitors

Lines of impatient visitors were waiting outside the gates at Makuhari Messe when CEATEC JAPAN 2000 opened on schedule at 10:00 a.m. on Oct. 3rd. The first day saw a press conference at 11:00 a.m., which was attended by more than 200 journalists and interested parties. There were heightened expectations toward CEATEC JAPAN, a new-concept exhibition.

Chairman Tadashi Sekizawa of the Communications Industry Association of Japan (CIAJ), representing the four sponsors, stood up for the opening remarks. In his speech, he said that information technology (IT), which is promoting widespread changes in both societies and lifestyles, is "a kind of civilization," and that it is creating its own culture. He went on to express the significance of the merger of two previous exhibitions (COM JAPAN and Japan Electronics Show) to respond to the paradigm shift in industry.

At the Opening Ceremony from noon, greetings were made by representatives of the sponsors, commemorative remarks were received from Goji Sakamoto, Senior State Secretary of International Trade and Industry and Takayoshi Tsuneda, State Secretary for Posts and Telecommunications. Both of these guests expressed their expectations for a successful exhibition. Toyoaki Hasegawa, General Managing Director and Executive Director-General of Engineering of NHK gave the toast at the ceremony.

Every effort was made at CEATEC JAPAN 2000 to organize booths for the convenience of visitors. A total of 748 companies and organizations, including many from abroad (see list below for numbers by nationality), had booths in the Business, Industrial and Home & Personal Stages and welcomed visitors from around the world. CEATEC JAPAN 2000 provided the ideal opportunity to see how the IT revolution will permeate our lives in the future.



No. of exhibitors, by nationality:
Taiwan 80, U.S. 31, U.K. 25, Germany 16, Hong Kong 12, France 6, China 6, Canada 5, Belgium 3, Switzerland 3, Korea 2, Thailand 2, Australia 1, Austria 1, Bahrain 1, Denmark 1, Finland 1, Netherlands 1, Israel 1, Norway 1, Singapore 1, Spain 1, Sweden 1.

《Outline of attracting IT products》

Next-Generation Cellular Telephones

- JAVA content services are scheduled to start last winter, and W-CDMA services from May 2001. Demonstrations of the terminals to come, as well as methods to transmit images and music. (Business Stage, NTT DoCoMo)
- Introduced a new position-information service designed with an eye on the introduction of W-CDMA. This service will allow users in different locations to confirm a meeting place on their cellular telephone displays. (Business Stage, J-Phone)
- cdma2000 is scheduled to commence in the autumn of 2001. Introduced a lineup of products including two-screen terminal units, wristwatch units and terminals with electronic money functions. (Business Stage, KDDI)
- Monitoring an in-home camera on a mobile information wristwatch. This product will greatly facilitate infant care and childcare. Also displayed a lightweight, compact videophone. (Business Stage, Panasonic)
- Turning a cellular phone into a headphone stereo. After storing music on a Memory Stick, it will be possible to download it to your next-generation cellular phone. (Home & Personal Stage, Sony)

Bluetooth

- Linking a cellular information terminal to a PC to achieve automatic equipment synchronization with no need for any wires to reach the Internet. (Home & Personal Stage, Toshiba)
- Use Bluetooth for wireless control of automobile equipment by linking car stereo, microphone, GPS system, and even cellular telephone. (Home & Personal Stage, Kenwood)
- Photos with a compact digital camera connected to a PHS terminal. Results were seen on a Bluetooth-linked printer. (Home & Personal Stage, Sanyo)

Wearable IT products

- In a collaboration with Bunka Fukuso Gakuin, a college for fashion-related studies, this exhibitor staged a fashion show under the theme of "wearable communication." The concept of this event was to propose ultramodern mobile items that also serve as fashion accessories.(Business Stage; Panasonic)
- Wearable telephones are a totally new concept. The user only has to bring a finger to one ear to hear the caller's voice, and operations such as answering calls are made on a finger patch.(Business Stage; NTT DoCoMo)
- IT can even help monitor fitness. Simply attaching a coin-sized tag on the wrist makes it possible to record and transmit data such as heart rate and bodily movements to a remote server, all without a single wire. (Business Stage; Tamura)
- Sony proposed new entertainment ideas with its Clie palmtop cellular terminal. This unit makes MP3 music mobile, and lets users access a variety of information from the Internet.(Home & Personal Stage; Sony)

Home Information Appliances

- The 10.3-inch "airboard" is a lightweight, wireless monitor designed for easy carrying from room to room for a variety of applications. For example, it can be used in the living room to watch new movies on DVD, in the kitchen to download a recipe from the web, or the den to edit digital photos before storing them for future use. The display is a multipurpose audiovisual (AV) network terminal. (Home & Personal Stage; Sony)
- Web-capable cellular telephone linked with in-home information equipment and appliances in a wireless network. This allows remote operation of air conditioners or video decks, and turns the lights on or off without being in the neighborhood. Monitor cameras in the home allows the user to check in from a cellular telephone, or operate a comprehensive security solution. (Home & Personal Stage; Sanyo)
- Connection of the network terminal on a refrigerator to the Internet through a cellular telephone. Downloading recipes from the web, or invent individual on-line lifestyle ideas. (Home & Personal Stage; enterNet project)
- An 110,000-pixel mobile camera installed in a cellular telephone. This booth featured a demonstration of ways to use such a system to take digital photos, web pages and other image data, and output them on a full-color mobile printer.(Business Stage; J-Phone East) (Business Stage; J-Phone East)

Exhibition floor space: approximately 29,000 square meter

CEATEC Japan 2000 closed its doors on October 7th as a success, having 172,053 visitors. CEATEC Japan 2001 is scheduled to be held from October 2 through 6 this year at the same venue.
For further information, please contact the following:

CEATEC JAPAN Organizing Committee
1- 12-16 Shiba Daimon,
Sumitomo Shiba Daimon Bldg.No.2, Tokyo, Japan
(c/o Japan Electronic Show Association)
URL: http://www.ceatec.com E-mail: ceatec@jesa.or.jp



CIAJ Proposal:

"Towards Realizing the IT Revolution" (Summary)

November 7, 2000

There is a need to achieve wide-spread common understanding of IT throughout Japan and at the current stage, clear designation of specific measures with an implementation schedule (Action Plan) which are consistent with a "Grand Design" expressing the strong intent of the government in building a vibrant country in the twenty-first century is essential.

A Japanese version of the IT revolution contributing to the long term revitalization of Japanese society and economy will be realized only when individuals, organizations, and communities are reorganized along new values and time axes rather than continuing down the path leading from the past. This Japanese IT revolution would recognize the traditions and culture intrinsic to the Japanese society.

From this perspective, CIAJ strongly believes that to seek the understanding and support of the general public through provision of specific information on long-term coordinated policies covering a broad spectrum, including the items listed below, is vital at this stage.

1. Education which nurtures individual abilities

IT is a tool aiding people's activities. It is hoped that it will nurture characteristics which allow individuals to be creative and act on one's own initiative in pursuing one's ideas while taking responsibility for one's actions.

2. Increase investment in IT through growth in demand for IT services

In order to heighten the understanding that IT is a tool for making lifestyles more convenient, early realization of pilot projects for electronic governments at local governments where the infrastructure is in place is needed.

3. Promote strategic IT R&D

In the next stage of the basic plan for technology development, propose comprehensive strategies for industrial technology in Japan, especially in areas where Japan holds the advantage in leading the world, such as photonics, mobile, and information appliances. In these areas, the know-how of the industry, government, and academia should be assembled in a concerted effort, with large-scale investment by the government.

IT will have a positive impact on all aspects of the nation's people. Therefore, we need to be willing to overcome challenges in bringing about socio-economic changes, implementing a distinct Japanese-style reform, and gaining the consensus of the Japanese people in this endeavor. We strongly hope that government policies will promote IT use in all aspects of government, business, and daily lives, securing Japan's position as a leading IT user country.

7th Overseas Study Mission Report

Europe Moves Toward m-commerce

CIAJ has continued to conduct regular studies on informatization policies and markets as well as technology trends in info-communications in Europe and North America. Three years ago, the study mission focused on the paradigm shift resulting from the spread of the Internet and cellular phones in Scandinavian countries. Two years ago, the focus was on IP networks in North America, with the members putting together a proposal on relevant issues in Japan.



Looking at structural changes in society and industries resulting from the popularity of the Internet and mobile networks as well as the global and corporate strategies of major companies revealed two extreme models, the N. American model and the European model, with each having distinctive characteristics. There was much to learn from these discoveries for Japan.

The 7th study mission focused on the U.K., France, Germany, and Italy, the major countries of the EU which had not been covered in depth in previous missions. The mission compared the findings with those of the two previous missions and compiled a report on new trends created by the Internet and mobile communications.

Schedule:

(1)Countries visited	**EU Headquarters, U.K., France, Germany, Italy**
(2)Duration	**May 20 - June 4, 2000**
(3)Participants	**11 representatives from NEC, Toshiba, Mitsubishi, Sharp, NTT DoCoMo**
(4)Offices visited	
Carriers	**BT, DT, FT, Cegetel, Bouygues Telecom, TIM, Telecom Italia, (NTT Europe, NTT DoCoMo Europe)**
Vendor	**Siemens, Italtel**
ISP	**Freeserve, Infostrada**
Broadcaster	**BBC, WDR, TELE+**
Government/ Organization	**EC Headquarters, EICTA, JETRO (Milano), ASSIFORM**

Outline of Findings:

(1)Growth of the EU market

The telecommunication market in the EU in 1999 was US$320.5 billion in sales, which was an 11.5% growth over the previous year. The Internet and mobile communications (cellular phone systems) were the major factors to this growth. The Internet has especially contributed to the growth of the info-communications market, as seen in its implementation and use as a strategic tool among a broad spectrum of companies and public sector organizations.

The telecommunication markets (in sales) of leading EU countries are as follows:

- Germany (US$57.6 billion, +7.7%)
- U.K. (US$44.4 billion, +8.8%)
- Spain (US$18.9 billion, +16.0%)
- France (US$35.7 billion, +12.3%)
- Italy (US$39.5 billion, +14.6%)

Mobile communications is popular in Spain, Italy, and France, showing significant growth in these countries, while in the U.K. and Germany, this growth remained in the 6 to 7 % range.

(2)Mobile Internet services

Several plans exist for mobile Internet services, but their realization is still in the future. Since the infrastructure is based on GSM, full scale implementation will likely occur with GPRS (General Packet Radio Service) using WAP (Wireless Application Protocol) at the end of this year. GPRS is said to be a transitive service until third generation networks are in place, but it is likely to be used for about ten years.

(3)Third Generation (UMTS)

Third generation (UMTS) systems are expected to be put in place gradually through the use of roaming with GPRS. Full-scale implementation is expected to be around 2005. Businesses, rather than individuals, are expected to be the major users of the new services, with the creation of killer applications being the key to whether there will be sufficient profit to make a return on investment. There is also the problem of lack of frequencies in urban areas.

(4)Licensing of Third Generation Operators

In reaction to the high bidding price of licenses in the U.K., France and Italy are reconsidering the method of licensing third generation operators. There are concerns that high bidding prices may result in scaling back investments in new facilities or higher prices for the users.

(Spain: 4 companies chosen by evaluation of application documents on April 27, 2000; Finland: 4 companies chosen by evaluation of application documents in December, 1999)

- U.K.: 5 companies chosen by bidding process on April 27, 2000, with total cost amounting 38.4 billion Euro (seven times original estimate).
- Germany: 3 companies expected to be chosen by bidding process in third quarter.
- France: currently deliberating evaluation of application documents. expected to choose 4 companies in the first half of 2001.
- Italy: deliberating use of two-step (evaluation of documentation→bidding) system (due to legal restriction on using outright bidding format). Expected to choose 5 companies in November, 2000.

(5)Growth of the mobile terminal market

- 500 million sets per year, of which possibly 450 million are GPRS mode terminals.
- average use of mobile terminal before exchanging it for a new terminal is 18 months.
- explosive growth of pre-paid cellular phones.
- large demand for user-friendly terminals with large potential for Japanese manufacturers.

(6)Integration of i-mode and WAP standards

There seems to be no obstacles to integration using WAP version 2.0

(7)Rapid developments in global strategies

Domestic→pan-European→global

Example: FT acquires Orange P.L.C. (43.2 billion Euro)

Example: NTT DoCoMo forms financial alliance with Voicestream Wireless Inc. and SK Telecom Co.

(8)Broadcasting operators

Despite the start of some digital services, large market growth is not expected until farther in the future.

(9)Broadband access

xDSL will be the major form of broadband access for the time being, with expansion of CATV systems difficult due to the legal environment and the nature of urban infrastructure in Europe (stone paved roads, underground archeological sites).

(10)Trends among ISPs

- business model for free Internet exists (Freeserve P.L.C.)
- using the distribution and client management system of its holding company, Dixons Group P.L.C., Freeserve P.L.C. is taking advantage of the synergy effect on its business.
- chat sites, search engines, sport sites, on-line shopping, and auction sites are popular services.

(11)Concentration and choice of business activities

Carriers and vendors are actively seeking survival strategies by concentrating and choosing business areas.

Ex.) subsidiaries specializing in mobile or Internet businesses (BT, DT, FT, TIM, Cegetel, Bouygues)

Ex.)procurement of capital through public offer of subsidiary stocks (DT, etc.)

Ex.)spin-off, alliance, selling off of divisions in non-major business areas

Comments:

Having a lead in mobile Internet services, now is the time for Japanese carriers, vendors, content service providers, and providers of relevant systems to actively implement strategies for gaining advantage in the global market with support from the public sector. If they miss this opportunity, there is a strong possibility that GPRS will quickly take hold in the much larger European market and the market know-how gained by Japanese players with i-mode will not be able to support the current lead a year from now.

Pending issues abound in the European Union, such as the inclusion of Eastern European nations, reforms of the various member nations, stabilizing the Euro, and measures to reduce unemployment. In such an environment, the EU is taking steps to encourage widespread use of IT and the Internet as the most promising means of tackling these issues. Following the use of a single currency, standardization of the legal and tariff framework of each country will be essential for the development of e-commerce. A concerted effort in this direction is being made.

Realization of the e-Europe concept will depend on the individual efforts of the member countries. However, the existing digital divide in Europe, caused by such factors as the gap in educational level or multi-ethnicity of its population, seem to pose as a major obstacle to its realization.

Japan should also take advantage of its (current) lead in mobile Internet by putting together a concept and application plan to realize an "m-Japan." Such a concept should provide solutions for the aging society, create a safe and comfortable society, and create an environment where self-expression leads to realization of individual dreams.

CIAJ Publications

Title	Outline	Frequency	Note
CIAJ Quarterly	Quarterly English newsletter. CIAJ's English publication in electronic form. It introduces CIAJ activities, Japanese telecom market trends, statistical reports, and other pertinent information for foreign readers. Available on the web or in PDF file format.	quarterly	free/English (available on website)
CIAJ Pamphlet	Provides an outline of CIAJ, including committee and Secretariat organization.	annual	free
CIAJ Yearbook	English version of the CIAJ pamphlet. Gives an outline of CIAJ, its committees, and statistics on Japan's telecommunication equipment industry in English.	annual	free/English
CIAJ Journal	CIAJ's publication for those in the telecommunication equipment industry. Includes interviews, articles on new technologies and service trends, news from abroad, announcements from CIAJ, industry statistics, and other pertinent information.	monthly	￥1,200/month (free to CIAJ Members) / Japanese with English Summary
Mid-Term Demand Forecast of Telecommunications Equipment (FY2000 version)	Mid-term demand forecast (-FY2005) data for telecommunications equipment. This forecast is based on CIAJ statistics which were deliberated by the thirty-one corporate members of the Research and Statistics Committee.	annual	Japanese
Immunity Test Guidelines for Telecommunications Equipment (Version 1)	Essential material on immunity for the telecommunication equipment industry. Immunity test guideline concerning electro-magnetic field issues, conforming to CISPR Pub 24, for telecommunication devices.	1st edition	Japanese
Guideline Concerning Indication of Safety Assurance for Telecommunications Equipment (Version 3)	Indication of Safety Test. The rules concerning indication of safety test result. The objective is to prevent harm to people as well as damage to their property when using the equipment.	3rd edition	Japanese
Report on Study of Cellular/PHS Vendors and User Trends (FY 2000 version)	2-volume study report. Report of the "Study on Use of Cellular/PHS Phones" and "Study of Mobile Communications Vendors." (both tentative English titles)	annual	Japanese

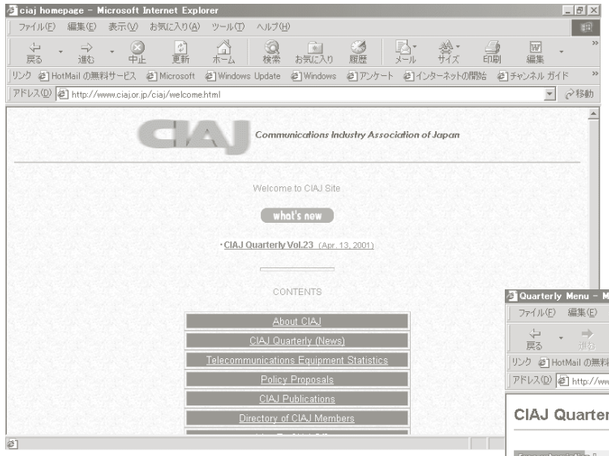
＊All English titles for Japanese publications are unofficial translations.

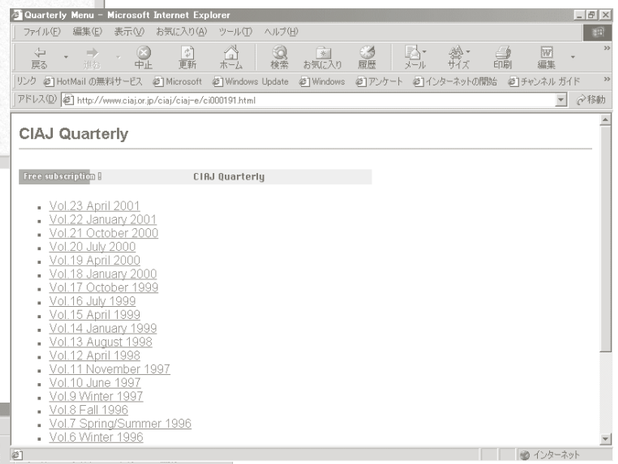
＊All publications are for a charge, unless otherwise noted. Please contact CIAJ for prices.

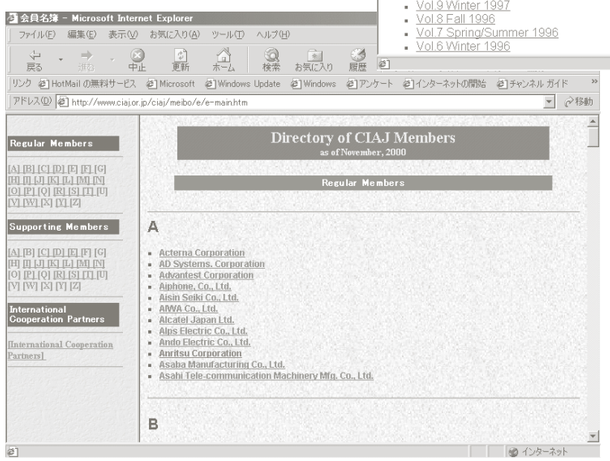
CIAJ Website

The CIAJ website provides updated information such as our activities, position papers, and statistics.
In addition, our quarterly newsletter on Japan's telecommunications industry, ***CIAJ Quarterly*** is also available either on the web or in PDF file format. ***CIAJ Quarterly*** can be sent directly to reader's e-mail address. Register through our website.

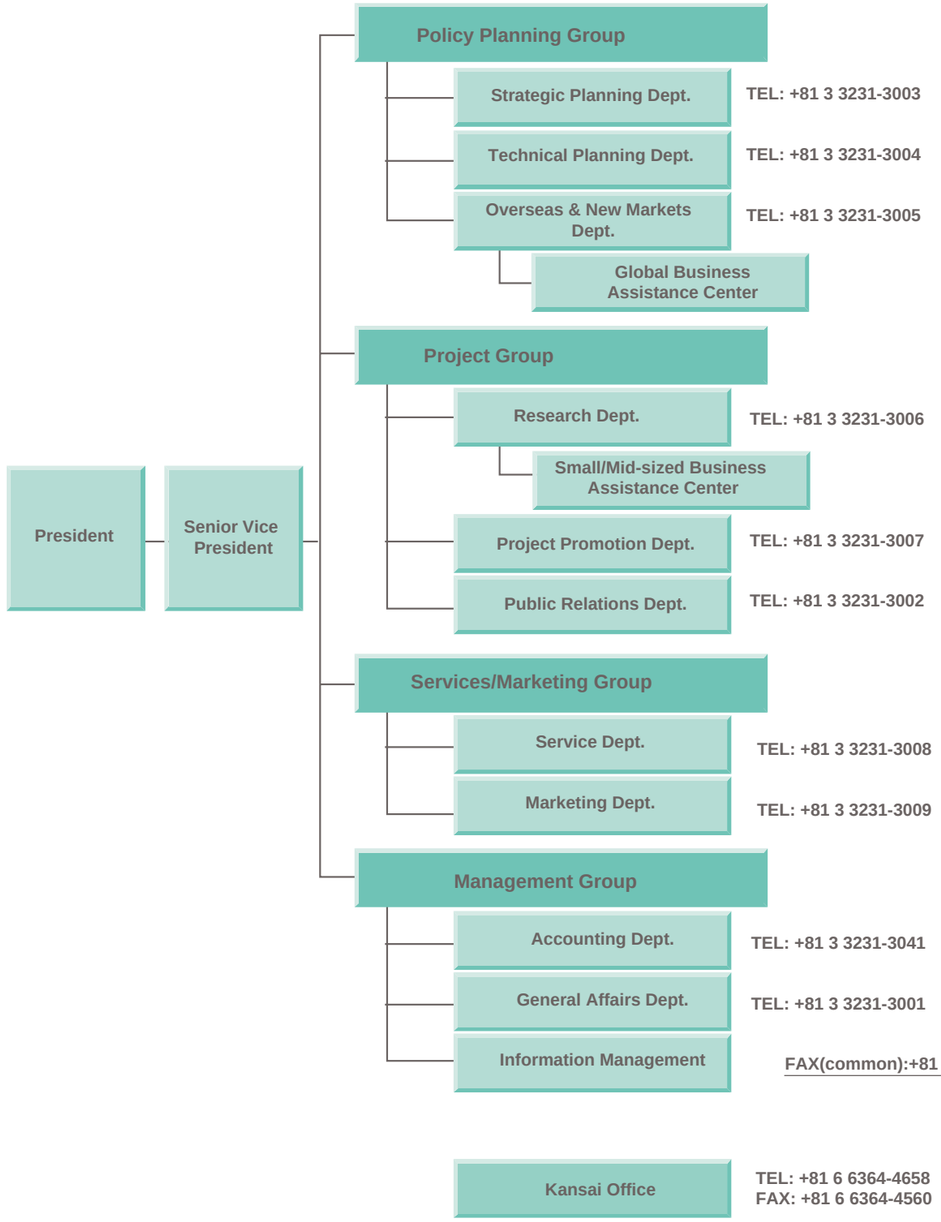
***CIAJ Website*: http://www.ciaj.or.jp/**







CIAJ Secretariat



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