NEC brings together and integrates technology and expertise to create the ICT-enabled society of tomorrow.

We collaborate closely with partners and customers around the world, orchestrating each project to ensure all its parts are fine-tuned to local needs.

Every day, our innovative solutions for society contribute to greater safety, security, efficiency and equality, and enable people to live brighter lives.
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1. Public Business Overview
Public Business Overview

Focus on Solutions for Society
Transformation into a “Social Value Innovator”

Solutions for Society

Public
Telecom Carrier
Enterprise
Smart Energy

Innovation of social infrastructure via ICT

FY2014 Sales Composition Ratio

Public

28%
Public Business Domains

ICT-based Solutions for Society primarily in the infrastructure domain

- **Government**
- **Community**
- **Financial Institution**

<table>
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<tr>
<th>Submarine cables (Telecom Carrier)</th>
<th><strong>Infrastructure</strong> diagnosis system</th>
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<td>Air traffic control system</td>
<td>Building energy management</td>
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<td>Runway safety monitoring</td>
<td><strong>Infrastructure</strong> surveillance</td>
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- **Banking systems**
- **Bank ATMs**

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<tr>
<th>Space</th>
<th><strong>Dam/river remote monitoring systems</strong></th>
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<td><strong>Satellite communications, earth observation</strong></td>
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<tr>
<th><strong>School, education systems</strong></th>
<th><strong>System</strong></th>
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<tr>
<td>Outdoor communication systems</td>
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</tr>
</tbody>
</table>

- **Critical infrastructure**
- **Building energy management**
- **Electronic medical records systems**

- **Police**
- **Hospitals**
- **Broadcasters**
- **Government agencies**
- **Fire departments**
- **Post offices**
- **Schools**
- **Municipalities**

- **Airports**
- **Power**

- **Banks**

- **Harbors**
- **Railways**
- **Roads**

- **Underwater surveillance**
- **Traffic control system**
- **ETC**

- **Infrastructure diagnosis system**
- **Digital TV transmitters**

- **Fire prevention digital radio systems**
- **Firefighting command systems**
- **Disaster prevention systems**

- **Satellite communications, earth observation**
- **Outdoor communication systems**

- **Postal tracking systems**

- **Community**

- **Financial Institution**

- **Government**

- **School, education systems**

- **Fire prevention digital radio systems**

- **Cloud services for municipalities**

- **Underwater surveillance**

- **Self Defense Forces**

- **Seas, rivers**

- **Cloudd services for municipalities**

- **Air traffic control system**

- **Runway safety monitoring**

- **Space**

- **Dam/river remote monitoring systems**

- **Disaster prevention systems**

- **Fire prevention digital radio systems**

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- **Space**

- **Dam/river remote monitoring systems**

- **Disaster prevention systems**

- **Fire prevention digital radio systems**

- **Cloud services for municipalities**
Main Customers

- **Government agencies**: Central government organizations, Government-affiliated organizations
- **Municipalities**: Local authorities, Fire departments, Waterworks Bureaus, etc.
- **Educational institutions**: Universities, elementary, junior and senior high schools
- **Medical institutions**: Hospitals, clinics
- **Transportation companies**: Operators of airports, railways, buses, and expressways
- **Financial institutions**: Banks, trust banks, credit unions, insurance companies, securities, JA, non-bank institutions
- **Broadcasters, media**: Broadcasters, newspaper companies, publishers
Business Performance

Maintaining an average annual growth rate of more than 10%, NEC was able to achieve its Mid-term Plan Sales target of 780 billion yen one year earlier in FY2014 for public business.
## Major Achievements

Exhibited stable performance in NEC’s areas of strength

<table>
<thead>
<tr>
<th>Main areas</th>
<th>Main achievements (★Contributors for outperforming MTP targets)</th>
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<tr>
<td>Administrative services</td>
<td>★Acquired order from Japan Agency for Local Authority Information Systems (J-LIS) for “My Number” intermediate server platform</td>
</tr>
<tr>
<td></td>
<td>● Ongoing renewal of systems for municipalities; increasing demand for face recognition as security measure</td>
</tr>
<tr>
<td>Defense</td>
<td>★Acquired order for field communication system through FY2014 Supplementary Budget</td>
</tr>
<tr>
<td>Public Safety</td>
<td>★Secured sales for special demands of fire prevention radio system digitalization</td>
</tr>
<tr>
<td></td>
<td>● Provided face recognition solution for Arizona Department of Transportation</td>
</tr>
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<td></td>
<td>● Conducted trials for disaster prevention information system using digital terrestrial broadcasting in the Philippines</td>
</tr>
<tr>
<td>Transportation, Water</td>
<td>● Built a mission-critical network using SDN*1 for West Nippon Expressway Company Limited (NEXCO-West)</td>
</tr>
<tr>
<td></td>
<td>● Conducted trials on effectiveness of water leak monitoring services in collaboration with City of Arlington, Texas</td>
</tr>
<tr>
<td>Broadcasting</td>
<td>● Acquired order for digital terrestrial TV transmitters from PBS TV*2, Thailand</td>
</tr>
<tr>
<td></td>
<td>● Constructed environment for live 4K digital terrestrial broadcasting for Brazil and UK TV stations</td>
</tr>
</tbody>
</table>

*1 SDN: Software Defined Networking  
*2 PBS TV (HQ: Bangkok, Thailand, Thai Public Broadcasting Service)
2. Business Environment
"My Number" and security demands are driving the public ICT market in Japan, with stable growth at approx. 2% expected.

(In trillion yen)

2014: 8.9
2015: 9.2
2016: 9.3
2017: 9.5
2018: 9.6

*2015-2018 CAGR 1.6%*

*CAGR: Compound Annual Growth Rate*


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Increasing security needs arising from legislation improvement, responding frequent occurrence of security incidents

**Government**
- Rise in cyber attacks targeting government agencies
- Reinforcement of the National Center of Incident readiness and Strategy for Cybersecurity (NISC)

**Municipalities / Public agencies**
- Actualization of needs for security measures following introduction of the “My Number” system
- Sudden increase in need for surveillance of transportation infrastructure due to arson attacks and other incidents/accidents

**Society**
- Increase in threats from terrorist and real/cyber attacks
- Proliferation and rise in amount of damage from Internet banking crimes
- Intensified damage from natural disasters and increased needs for disaster prediction
Medium- to Long-Range Direction

Keep the growth momentum by seizing the major, medium- to long-term demand trends.

Sales

Existing business

Fire prevention radio

My Number

Public Safety

Business growth along the major demand wave

Initiatives for future business expansion

- Water ICT
- Optimization of operations for critical infrastructure
- Medical, healthcare
- Finance (Fintech)


Software radio development

Experience in implementing government and municipal systems

Accumulation of recognition technologies and cyber security measures

R&D and field trials
3. Focus Domains
①“My Number”
Market Scale of My Number-Related Systems

Aim to achieve 100 billion yen in sales out of the 360 billion yen*1 market for infrastructure development from 2014 to 2016

*1 NEC estimation

*2 Government Security Operation Coordination team

*3 Disclosure System of Personal Information Corporation Record

*4 as of July 2015

**System (compulsory) support**

2014 to 2016

2017 onwards

**Private companies**

- Banks, securities
- Life, non-life insurance
- Distribution
- Manufacturing
- Transportation
- Communications, Power

**Government Organizations**

- MIC, MLIT, MEXT, MOJ, DICJ, etc.
- Nursing care insurance providers
- Pharmaceutical companies

**Related organizations**

- Medical institutions
- Dispensing pharmacy

**Recognition platform**

- My Number Portal *3
- GSOC *2
- J-\**LIS
- Juki Net
- JPKI
- Local Government Wide Area Network (LGWAN)

**Information delivery network system**

- Internet
- Individual number card

**Local authorities**

- Specific Personal Information Protection Commission
- (1,743*4 organizations)
- Juki Net
- Municipality intermediate servers
- JPKI

**Intermediate server**

- Local authorities
- Internet
- My Number Portal

**Individual number card**

- System utilization
- Individual number card
- Public-private partnerships
- Credit card payment terminals
- Biometrics
- Kiosk ATM
- Entry/exit gates

**Related organizations**

- Hospitals
- Pharmacies
- Income verification

**System utilization**

- GSOC: Government Security Operation Coordination team
- J-\**LIS: Disclosure System of Personal Information Corporation Record

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Market Scale of My Number-Related Systems

Aim to achieve 100 billion yen in sales out of the 360 billion yen*1 market for infrastructure development from 2014 to 2016

(Government systems) 140B yen*1

(Municipal systems) 160B yen*1

(Security measures) 60B yen*1

*1 NEC estimation

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Market Scale of My Number-Related Systems

Aim to achieve 100 billion yen in sales out of the 360 billion yen*1 market for infrastructure development from 2014 to 2016

(Target) 100B yen
(FY2014-16, including security)

*1 NEC estimation
NEC’s Strengths in the My Number Market

Deploy knowhow on implementation of mission-critical systems for local governments nationwide

NEC’s strengths

- Knowhow gained through implementation of mission-critical systems for governments
  - Intermediate server platform
    - NEC independent contract

- Wide experience in implementing mission-critical systems for local authorities
  - Approx. 20% market share

Expansion measures

- Expansion to intermediate server business
- Information delivery network system
- Shared government NW
- Municipality intermediate server
- J-LIS (Japan Agency for Local Authority Information Systems)
- Prompt application to municipality business systems

Local authorities (1,743* organizations)

- Related organizations
- National agencies
- Local Government Wide Area Network (LGWAN)
- Prefectures
- Municipalities

* as of July 2015

*Approx. 20% market share
Offer advanced security measures based on NEC’s security technologies

**Cyber security solutions**

1. Remote surveillance and analysis (SOC*)
   - Offer advanced security solutions based on NEC's security technologies
2. Measures to improve convenience (SDN, thin-client terminals, etc.)
   - Take facial photo upon visit to Municipal Office
   - Matching
3. Municipal information security cloud
   - Municipality cloud with SOC functions

**Biometrics solutions**

- Adopt NEC’s face recognition solution to enforce rigorous personal identification procedures during issuance of Individual Number Cards at municipalities nationwide
- To be used at all municipalities nationwide beginning January 2016

*SOC: Security Operation Center
Market Scale of My Number-Related Systems

Support the creation of new services arising from the use of "My Number" by the private sector

Personal identification based on the My Number platform (Individual number card, face recognition)

Retail

Electricity, gas

Broadcasting, communication

Finance

Healthcare

Manufacturing

Transportation

Internet

Government agencies

Local authorities

Specific Personal Information Protection Commission

GSOC

Information delivery network system

Intermediate server

Shared government NW

Juki Net

JPKI

(公的個人認証

System

(compulsory)

Support the creation of new services arising from the use of "My Number" by the private sector

《Use by private sector》

700B yen*

*NEC estimation
Market Scale of My Number-Related Systems

Support the creation of new services arising from the use of “My Number” by the private sector

- **My Number seminars for private enterprises**
  - Held for 2,500 companies*

- **Contribute to promotion and penetration of My Number**

*approx. total since Nov 2015

- **Use by private sector**
  - 700B yen*

*NEC estimation

**Related organizations**
- Local authorities
- Internet access providers
- Juki Net
- GSOC
- JPKI
- MIC
- MLIT
- MEXT
- MOJ
- DICJ

**System utilization**
- Individual number card
- Face recognition
- Biometrics
- Credit card payment terminals
- ATM
- Kiosk
- Biometrics

**Market segments**
- Retail
- Finance
- Broadcasting, communication
- Healthcare
- Transportation
- Electricity, gas
- Manufacturing

**Support**
- Promotion and penetration of My Number
- Creation of new services
- NEC calculation

**Timeline**
- 2014 to 2016
- 2017 onwards

**Additional**
- J-IIS (Japan Agency for Local Authority Information Systems)
- Specific Personal Information Protection Commission

**Recognition platforms**
- Electronic private mailbox
- GSOC
- Information delivery network system
- Related organizations
- Intermediate server
- Juki Net
- JPKI

**Partnerships**
- Public-private partnerships
Usage Example (My Number ATM)

Optimize and improve accuracy of ATM-based procedures.
Deploy services based on rigorous personal identification, and improve convenience of citizens.

Use of ATM as a high-functionality terminal familiar to citizens

- Card reader
- Biometrics
- Multilanguage support
- Highly reliable network

Financial transactions (Open/change accounts)

- Expanding services
- One-stop services
- Electronic private mailbox

NEC’s market share for Convenience store ATM: 45%
Usage Example (Healthcare Payments)

Use of My Number card for all transactions—from insurance card verification to payment

〈In the hospital: Usage flow〉

Reception

Insurance card verification using Individual Number Card

Payment using Individual Number Card

Local authorities

Insurer

Japanese Public Key Infrastructure (JPKI) Service Center

List of disqualified users

・4 basic information items*2
・E-certificate number
・Use ID, etc.

From: MIC “Private sector utilization trial for public individual authentication services in the broadcasting and communication fields”

*1 Virtual Private Network

*2 Name, Address, Birth date, Gender

Credit companies

Member information

Community healthcare network
3. Focus Domains

② Public Safety
Increasing Security Risks in the IoT* Era

With the advancement of IoT, integrated protection combining physical and cyber spaces has become essential in maintaining stable operations of social infrastructure.

*IoT: Internet of Things
Stabilize operations for entire facility through integrated monitoring of equipment operation status and of physical and cyber threats against facilities and equipment.
NEC’s Strengths (Cyber Security 1)

Backed by highly advanced human resource and information, NEC has the total capability to implement the most appropriate system.

**Information**
- Collaboration with INTERPOL
- Practical cyber defense exercises CYDER*1
- Participation in Japan Cybercrime Control Center (JC3)

**Human Resources**
- Acquisition of Cyber Defense Institute
- Acquisition of Infosec
- Joint human resource development with Singapore government
- Sponsored course at the Japan Advanced Institute of Technology

**Technology**
- SDN collaboration (automatic communication interception)
- Biometrics collaboration (continuous monitoring of device users)
- Big Data collaboration (unknown attack countermeasures)
- Data encryption technologies (secured computing, quantum cryptography)

**System construction**
Experience in systems integration of many customers

*1 CYDER: Cyber Defense Exercise with Recurrence
NEC’s Strengths (Cyber Security 2)

**Reinforcement of information-sharing in cyber security**

**Collaboration with INTERPOL**

Collaboration with INTERPOL on global cyber security measures. Fusion of NEC’s advanced cyber security technologies with INTERPOL’s knowhow and international anti-crime network.

**Practical cyber defense exercises CYDER**

Subcontractor for MIC “Analysis, Defense-model, and Exercise against Cyber Attacks” Project since FY2013. NEC prepares and implements exercise programs (Photo: October 2014 exercise).

**Participation in Japan Cybercrime Control Center (JC3)**

Consolidate experience of industry, academe, and government (police) in handling cyber threats. Disable the origin of threat to prevent damage. NEC Executive Vice President, Chief Marketing Officer, and Member of the Board Takaaki Shimizu appointed as Executive Director of JC3 (November 2014 Press Release).
NEC’s Strengths (Cyber Security 3)

Professional security experts to fight against professional cybercrime groups. Consolidate superior human resources, advanced information, and state-of-the-art technologies into the Cyber Security Factory.

Cyber Security Factory

- 24h-365 day monitoring of networks
- System analysis and exercises using simulated environments
- Knowledge-sharing and analysis of cyber attack trends
- Development of advanced security technologies
- Training and improvement the skill level of security administrators
- Evidence preservation and inspection through analysis of digital information

(Started operations in June 2014)
NEC’s Strengths (Physical Security)

Having developed many unique technologies through long years of R&D, NEC takes pride in its high level of innovativeness.

- Face recognition
- Fingerprint identification
- 3D perimeter recognition, object recognition (Urban safety solution)
- Crowd behavior analysis
- Human behavior analysis, line-of-movement analysis
- Image sharpening, super-resolution
- Ultra-high sensitivity camera (harbor monitoring)
- Infrared camera (fever detection)
- Monitoring signs of malfunction (Big data analysis)

World’s No.1*/Only 1 technologies

* Source: NEC
Public Safety Business Execution

Generating synergy in business execution through joint marketing and solution development activities with the Global Safety Division, established in Singapore on April 2013.

- **Smart Cities**
  - Optimization of garbage collection system through the use of sensor information (Spain)

- **Transportation systems**
  - Train (subway) communication and surveillance systems for the Land Transportation Authority (Singapore)

- **Recognition solutions**
  - Fingerprint and face recognition for Police (U.S.)

- **Surveillance services**
  - City surveillance service (Argentina)

**Public Business Unit**
- NEC Europe
- NEC Asia Pacific
- NEC(China)
- NEC America
- NEC Latin America

Collaboration

**Global Safety Division**
NEC’s Strengths (Achievements in Public Safety)

For approximately 30 years, NEC has deployed more than 500 recognition systems in over 40 countries around the world, as part of its public safety business initiatives in a wide range of countries and regions.

- Earthquake and tsunami detection using submarine cables
- Cloud systems for Disaster prevention and emergency
- Taiwan Power Company Disaster Prevention Center (Taiwan)
- Fingerprint/face recognition for Police (U.S)
  - Western Identification Network (WIN)
  - Pennsylvania Justice network
  - Automatic fingerprint identification system for State and Municipal Police, etc. (many others)
- Face recognition for customs of 14 airports
- Systems for stadiums (Brazil)
- Face recognition for Police (India)
- Issuance of biometric passports
- Subway communication and surveillance systems for the Land Transportation Authority (Singapore)
- City surveillance service (Argentina)
- Optimization of garbage collection using sensor information (Spain)
- Visa information system (Greece)
- Face recognition for Police (India)
- National ID system (South Africa)

Increasing number of public safety projects along with the growing safety needs around the world.
Argentina: Tigre City Surveillance Service Case Study

Reduction in crime rate after introduction of service; Horizontal deployment using this case study as a standard model for surveillance services

- Offer city surveillance system as a service to Tigre City, Argentina.
- Use of behavior detection engine to detect actions that could lead to crimes, such as loitering, riding double on motorcycles, riding without helmet, etc.
- Use of face recognition to identify blacklisted persons or missing persons in train stations, etc.
- 40% reduction in car thefts after surveillance was implemented (Between first half of 2013 and first half of 2014)
Growth of Public Safety Business

Aim to achieve growth exceeding the market growth rate for security-related business

Expansion in cyber security business through M&A

- World’s No.1 biometrics technologies
- Technologies nurtured through deployment in central government agencies

8% market growth rate

Physical Security

Cyber Security

Fusion

Public Safety

>80B yen

110B yen

2014

2015

* Market growth rate is inferred from NEC research materials
4. Initiatives for Future Growth
Initiatives for Future Business Expansion (Value Creation through partnership)

Create new social solutions business, and conduct innovative new trial projects in collaboration with partners possessing knowhow in particular domains.

**Things (Superior technology)**
- Water hybrid sensor
- Invariant analysis
- SAR*/ satellites
  - *Synthetic Aperture Radar
- Drone + sensor

**Trial projects**
- Prediction of water pipe deterioration
- Failure sign detection
- Wide-area infrastructure diagnosis
- Infrastructure inspection

**Phenomena (new value creation)**
- Water
- Critical infrastructure
- Healthcare
- Finance

**Approach from things (technologies) to phenomena (new value creation)**

**New business creation that begins with a deep understanding of business, operations, and social problems**
Approach from things to phenomena  (Water ICT Case Study)

Leverage technologically superior hybrid sensors (vibration, water pressure, temperature) and partnering with industry vendors to enter Water ICT (Water AMI*) market.

- **Leak detection/deterioration assessment**
- **Application of ICT to entire water ecosystem**
- **Expansion of IoT coverage area**

- **Diagnosis of water pipe deterioration**
- **Operation service for water pipe assets**
- **Water AMI network service**

- **Water leak detection trial in Texas State**
- **Joint research on smart water management with Imperial College London**
- **Key asset development (Hybrid sensor)**

- **Understanding of phenomena**
- **Deeper understanding of phenomena**

- **Business rollout leveraging technological superiority**
- **Expansion of IoT coverage area**
- **Smart Meter/Lights/Sensors/Actuator**

*AMI: Advanced Metering Infrastructure (Infrastructure for remote metering via the network)*
Using the failure sign detection system based on sensor data as a market entry point, develop into consulting services that support the improvement of operations through an understanding based on acquired knowledge.

**Understanding of things**
- Sensor data
- Authentication logs
- Operation logs
- Surveillance videos

**Understanding of phenomena**
- System logs
- Work logs

**Deeper understanding of on-the-ground situations based on acquired industry knowledge**

**Amplification of offered value**
- Analysis of sensor data from multiple plants
- Matching of surveillance videos with operation and system logs
- Understand work flow and style from human movements and operations
- Work improvement Operations optimization

**Failure sign detection system**

**Safe operations of entire facility**

**Understanding of phenomena**
- Understanding of humans, things, and environment

**Acquisition of industry knowledge through partnering with operators of critical infrastructures**

*Invariant analysis*

*Infrastructure inspection using drones*

*SAR Image Analysis*

*SAR: Synthetic Aperture Radar*
New business creation that begins with a deep understanding of business, operations and social problems (Medicine, healthcare)

Aim to provide total care, which goes beyond healthcare and supports an abundant lifestyle, and create the healthcare support services needed to deliver it

Digital hospital

Understanding of phenomena through collaboration with industry experts

Understanding of phenomena and business model creation through partnering with medical institutions and doctors

Business model verification

Understanding of phenomena and Big Data

Co-creation of ideal phenomena

Total lifecycle care

Combination of things

New value creation

Applied technologies

Digital hospital

Business model verification

Total lifecycle care

Understanding of phenomena

Co-creation of ideal phenomena

New value creation

Biometric authentication

Image analysis

Big Data

(Examples of model)

Diagnosis assistance

Patient monitoring

Registration card with payment function

Patient card cloud system

Total NW/Security Delivery of different life services

Understanding of phenomena and business model creation through partnering with medical institutions and doctors

Combination of things

Applied technologies

Biometric authentication

Image analysis

Big Data

(Examples of model)

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Understanding of phenomena and business model creation through partnering with medical institutions and doctors

Combination of things

Applied technologies

Biometric authentication

Image analysis

Big Data

(Examples of model)

Diagnosis assistance

Patient monitoring

Registration card with payment function

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(Examples of model)
New business creation that begins with a deep understanding of business, operations, and social problems (Finance Case Study)

Aim to create an abundant society with a more revitalized economy through financial services, and create new financial services through partnering with financial institutions

Provision of new services through Fintech

Understanding of phenomena through collaboration with industry experts

Business design through partnering with financial institutions and advanced enterprises

Business model verification

(Examples of model)

- Microfinance
- Crowdfunding
- Mobile payment
- Multi function ATM
- Combination of things

Co-creation of ideal phenomena

Contribution to establishment of financial infrastructure in emerging countries

Revitalization of hidden capital demands and circulation of investment funds

Alliance/Co-creation

Financial institutions

Advanced enterprises (Fintech)

NEC

IT

Construction knowhow

Understanding of phenomena
Summary

Public ICT market in Japan is foreseen to exhibit stable single-digit growth.

Focus on My Number-related business and public safety business as the current growth drivers:

- Aim for 100B yen in sales in My Number-related business for FY2014-16. Reset targets considering stable order intake.
- Leveraging NEC’s global and domestic strengths in public safety business, target of 100 billion yen* in FY2015.

Execute investments aimed at new domain expansion towards medium- to long-term growth.

*Including GSD (Global Safety Division)