



# Results for the 1<sup>st</sup> Quarter of 37<sup>th</sup> business period (Fiscal Year Ending March 31, 2021)

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**TECHMATRIX CORPORATION**

- 1. Business Highlights for the 1<sup>st</sup> Quarter  
37th business period (Consolidated)**
- 2. Topics of Business activities**
- 3. Medium-Term Management Plan "GO  
BEYOND 3.0"**
- 4. Business Models**
- 5. Market Conditions for our business**

# 1. Business Highlights for the 1<sup>st</sup> Quarter of 37th business period (Consolidated)

- ◆ We applied “Accounting Standard for Revenue Recognition” (ASBJ Statement No. 29, March 30, 2018) and “Implementation Guidance on Accounting Standard for Revenue Recognition” (ASBJ Guidance No. 30, March 30, 2018) from the beginning of the first quarter of the fiscal year ending March 31, 2021.

# Business Highlights (Consolidated)

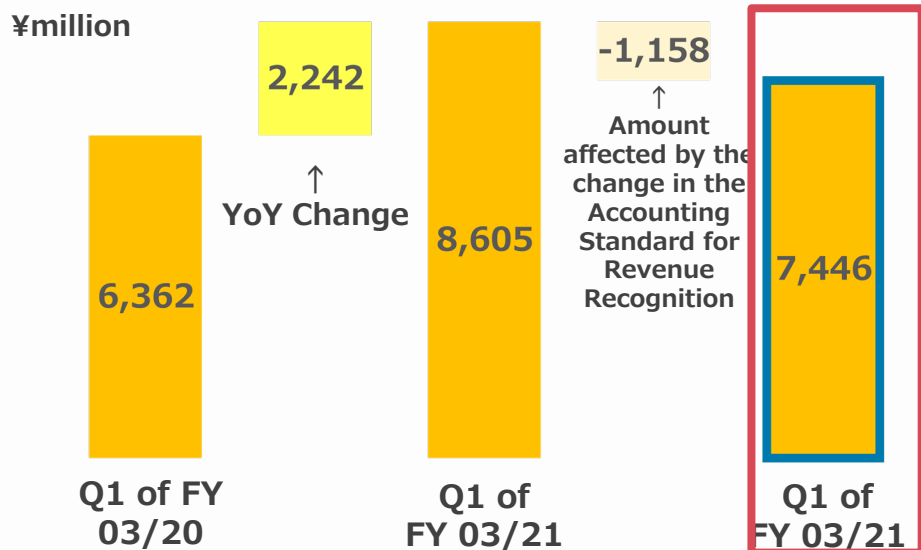
- ◆ The highest consolidated net sales, operating income, ordinary income and profit attributable to owners of the parent.

The New Accounting Standard for Revenue Recognition

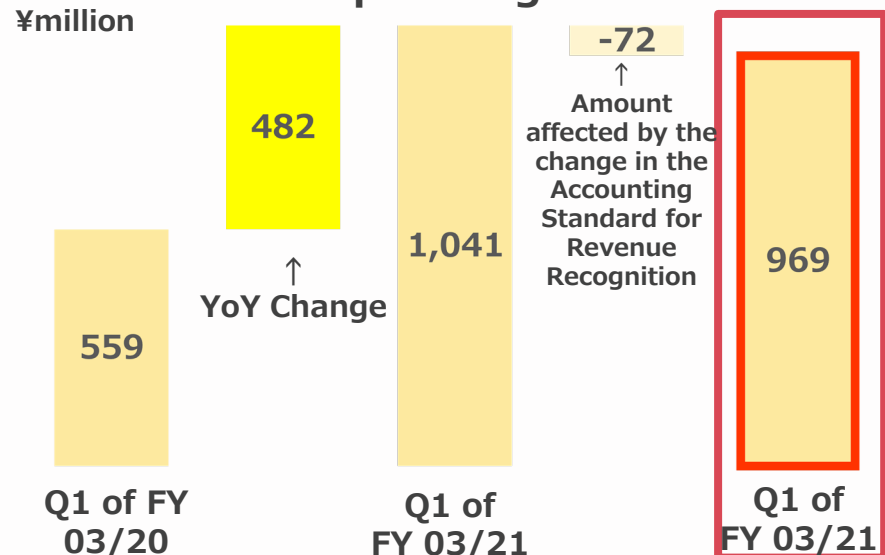
	Q1 of FY 03/20 (¥Million)	Q1 of FY 03/21 (¥Million)	Change in amount (¥Million)	Rate of Change (%)
Net sales	6,362	7,446	+1,084	+17.0%
Operating income	559	969	+410	+73.3%
Ordinary income	558	973	+414	+74.2%
Profit attributable to owners of the parent	369	654	+284	+77.0%

# Business Highlights (Consolidated)

## Total Net Sales



## Total Operating income



\* The New Accounting Standard for Revenue Recognition

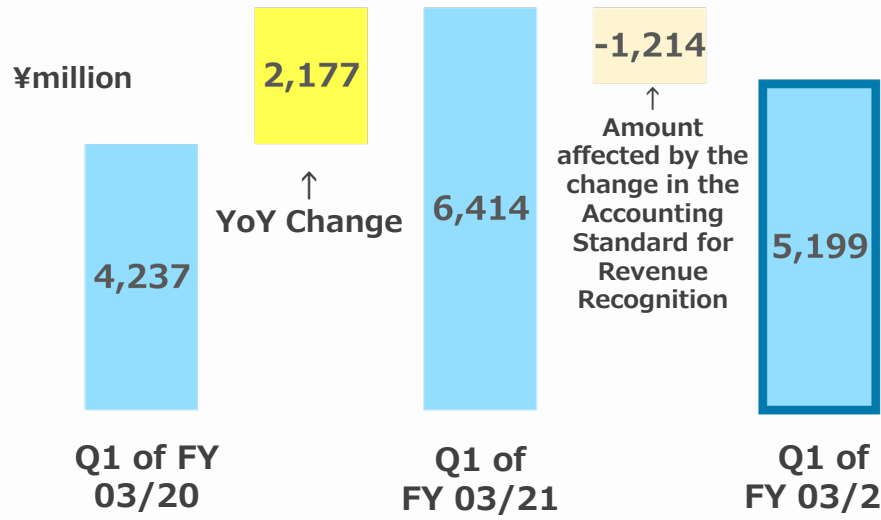
\* The New Accounting Standard for Revenue Recognition

	Q1 of FY 03/20	Q1 of FY 03/21 (below : The New Accounting Standard for Revenue Recognition)	Change in amount (below : Compared to the amount recognized under the New Accounting Standard for Revenue Recognition)	Rate of Change (below : Compared to the amount recognized under the New Accounting Standard for Revenue Recognition)
Net Sales	6,362	8,605 7,446	+2,242 +1,084	+35.3% +17.0%
Operating income	559	1,041 969	+482 +410	+86.3% +73.3%

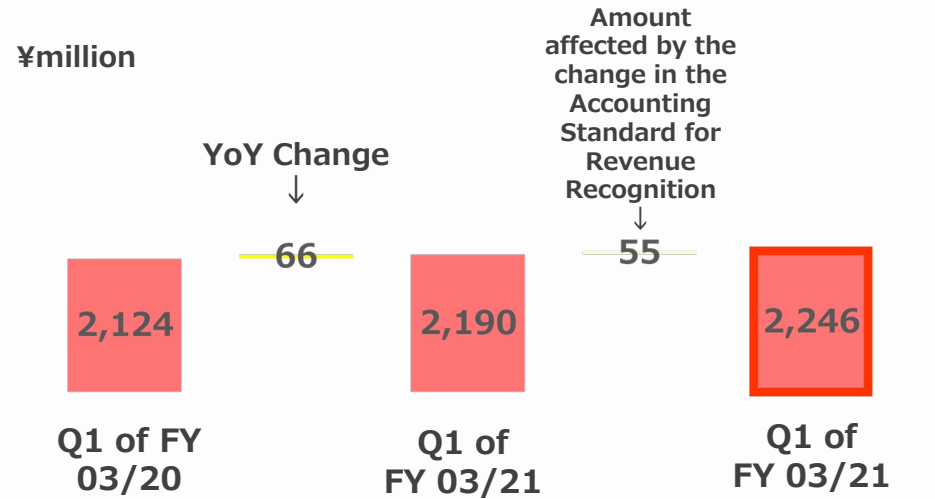
◆ Applying the Accounting Standard for Revenue Recognition strictens the timing and the amount of revenue recognition of the products with 1st-year maintenance and subscriptions... corresponding to the timing and the amount at which each performance obligation is fulfilled.

# Net Sales by Segment

## Information Infrastructure Business



## Application Services Business



\* The New Accounting Standard for Revenue Recognition

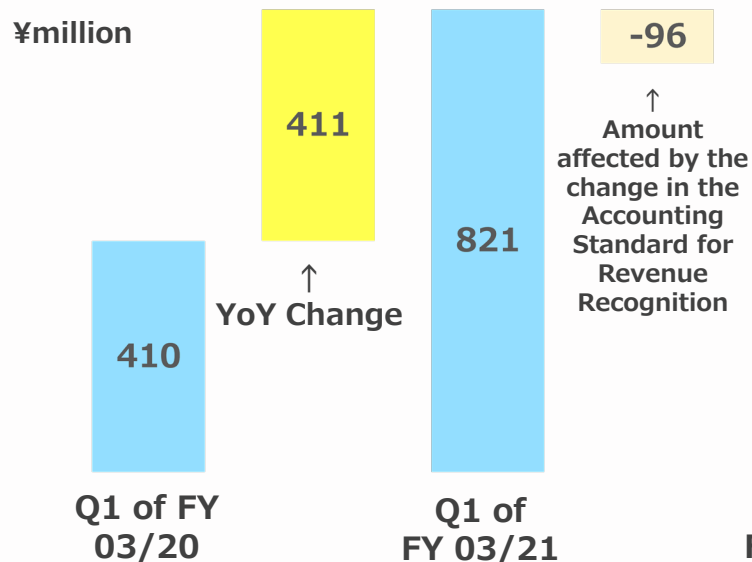
\* The New Accounting Standard for Revenue Recognition

	Q1 of FY 03/20	Q1 of FY 03/21 (below : The New Accounting Standard for Revenue Recognition)	Change in amount (below : Compare to the amount recognized under the New Accounting Standard for Revenue Recognition)	Rate of Change (below : Compare to the amount recognized under the New Accounting Standard for Revenue Recognition)
Information Infrastructure Business	4,237	6,414	+ 2,177	+ 51.4%
		5,199	+962	+22.7%
Application Services Business	2,124	2,191	+ 66	+ 3.1%
		2,246	+122	+5.8%

- ◆ Information Infrastructure Business : The highest consolidated Net sales. Inquiries for cloud-based security products increased. Received large-scale orders for SASE (p.16). Bookings for cybersecurity products related to remote access control stay strong since Q4 of the fiscal year ending March 2020.
- ◆ Application Services Business : The highest consolidated Net sales. However, slight slowdown in the pace of order acquisition. Sales in the CRM field were strong. Sales in the medical field remained firm. Software quality assurance field was affected by a suppression for investment budgets on a facing market.

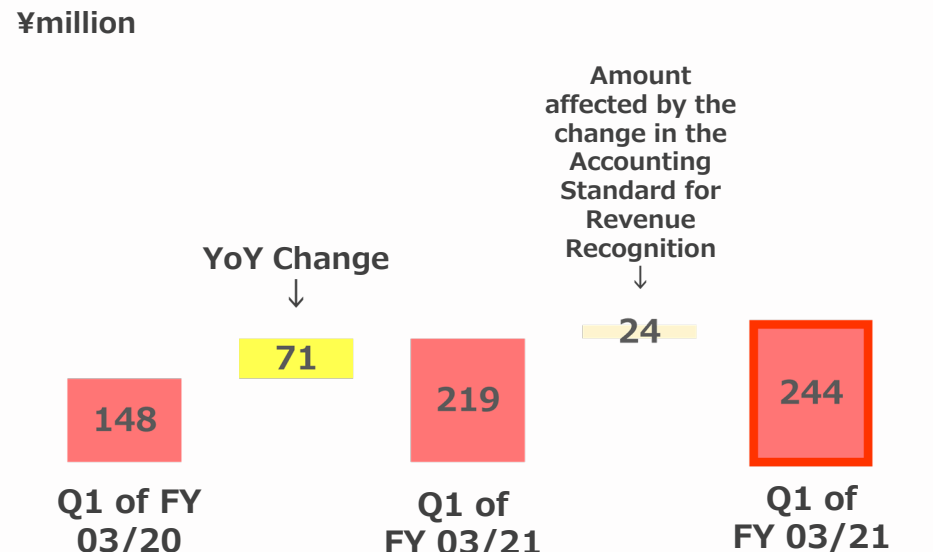
# Operating income by Segment

## Information Infrastructure Business



\* The New Accounting Standard for Revenue Recognition

## Application Services Business



\* The New Accounting Standard for Revenue Recognition

	Q1 of FY 03/20	Q1 of FY 03/21 (below : The New Accounting Standard for Revenue Recognition)	Change in amount (below : Compare to the amount recognized under the New Accounting Standard for Revenue Recognition)	Rate of Change (below : Compare to the amount recognized under the New Accounting Standard for Revenue Recognition)
Information Infrastructure Business	410	822	+412	+100.3%
		725	+314	+76.7%
Application Services Business	148	219	+71	+47.7%
		244	+95	+64.0%

◆ Information Infrastructure Business and Application Services Business: The highest consolidated operating income.



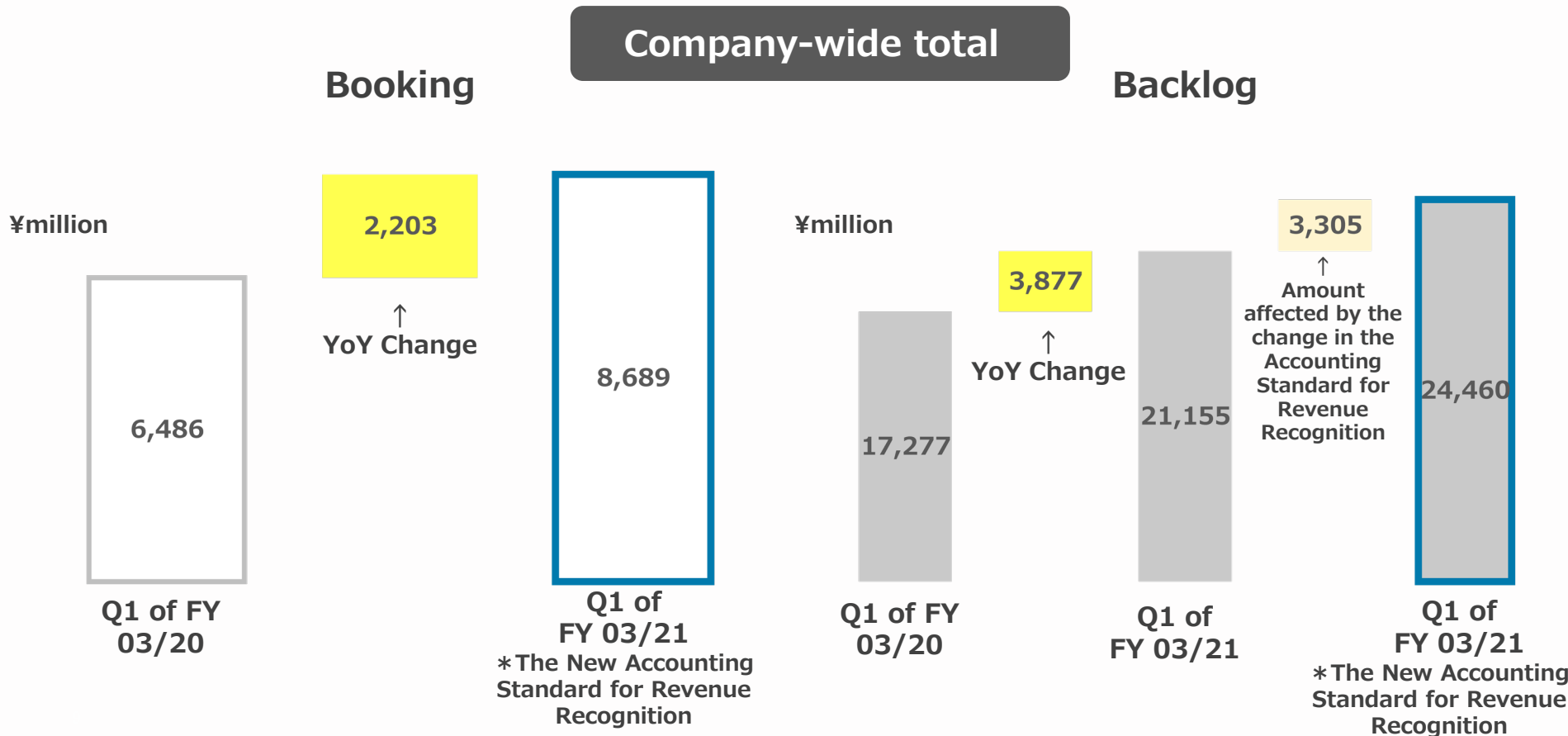
# Weather chart by Segment

◆ Information Infrastructure Business	Year on year	Year on year (The New Accounting Standard for Revenue Recognition)
Load balancers (BIG-IP, EDGE)		
Next-Generation Firewall / SASE / SOAR (Palo Alto)		
Antivirus / Intrusion prevention Appliances / Security Information and Event Management(SIEM) / Web security		
Personal authentication systems / Forensic products / Storage products		
Security-related operation and monitoring services		
AI-driven threat protection/Endpoint detection and response/others		
CROSS HEAD & Okinawa Cross Head		
◆ Application Services Business	Year on year	Year on year (The New Accounting Standard for Revenue Recognition)
Business Solution field (Including CASAREAL)		
Software Quality Assurance field		
Medical field (Including Ichigo)		
CRM field		

+10% and over  
 +5% ~ +10%  
 within ±5%  
 within Δ10%  
 under Δ10%

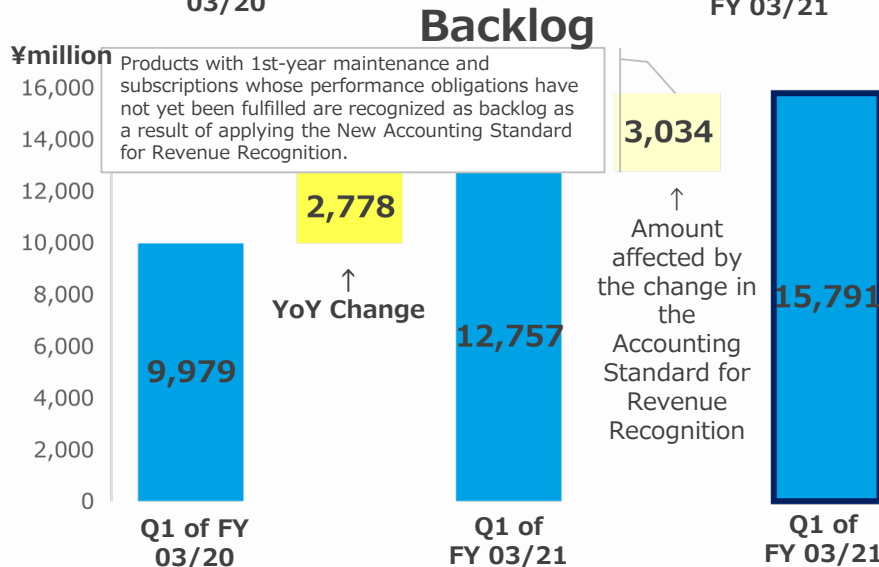
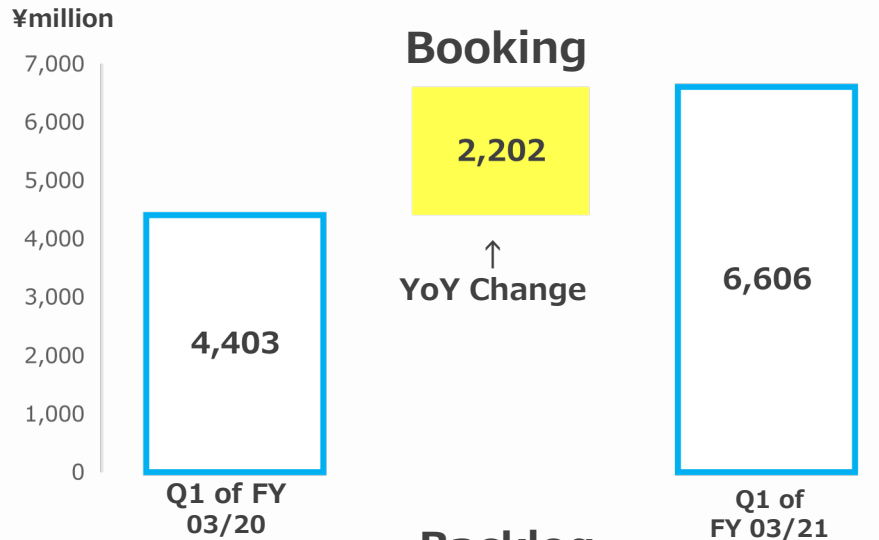
# Booking and Backlog

- ◆ Booking were in good shape. Especially, Information structure business was strong.
- ◆ Products with 1st-year maintenance and subscriptions whose performance obligations have not yet been fulfilled are recognized as backlog as a result of applying the New Accounting Standard for Revenue Recognition. \* Amount of profits recognized in the past which was affected by the change in the Accounting Standard for Revenue Recognition was adjusted to retained earnings at beginning of the current fiscal year, and performance obligations to be fulfilled in the current fiscal year and thereafter were / will be recognized as revenue in the current fiscal year and thereafter.



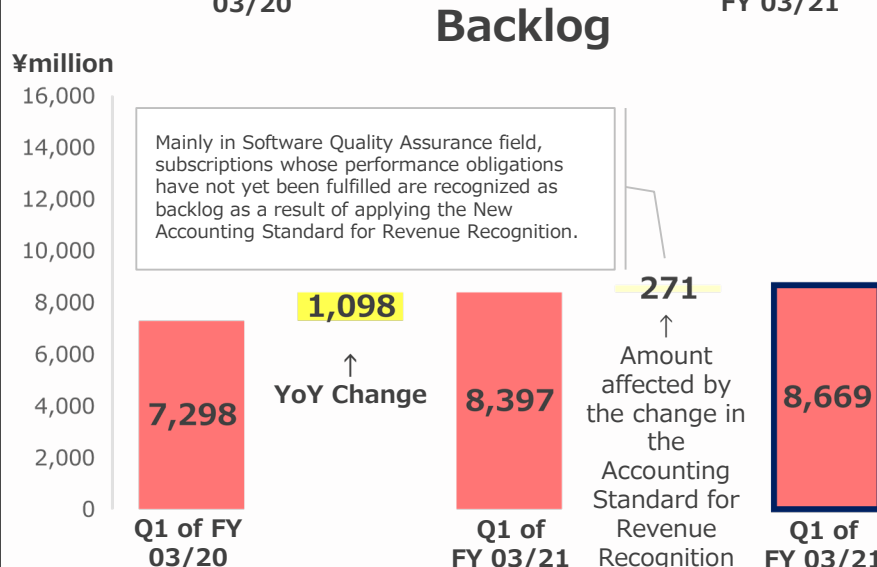
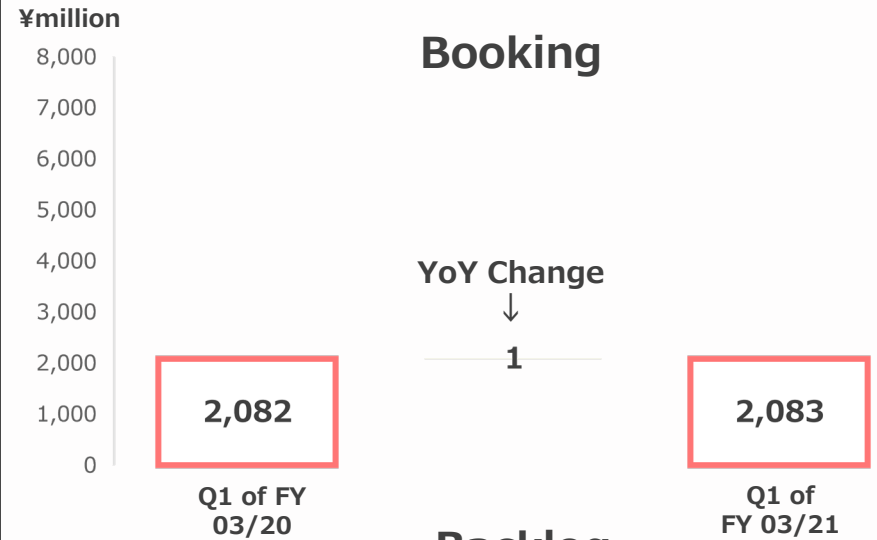
# Booking and Backlog by Segment

## Information Infrastructure Business



\* The New Accounting Standard for Revenue Recognition

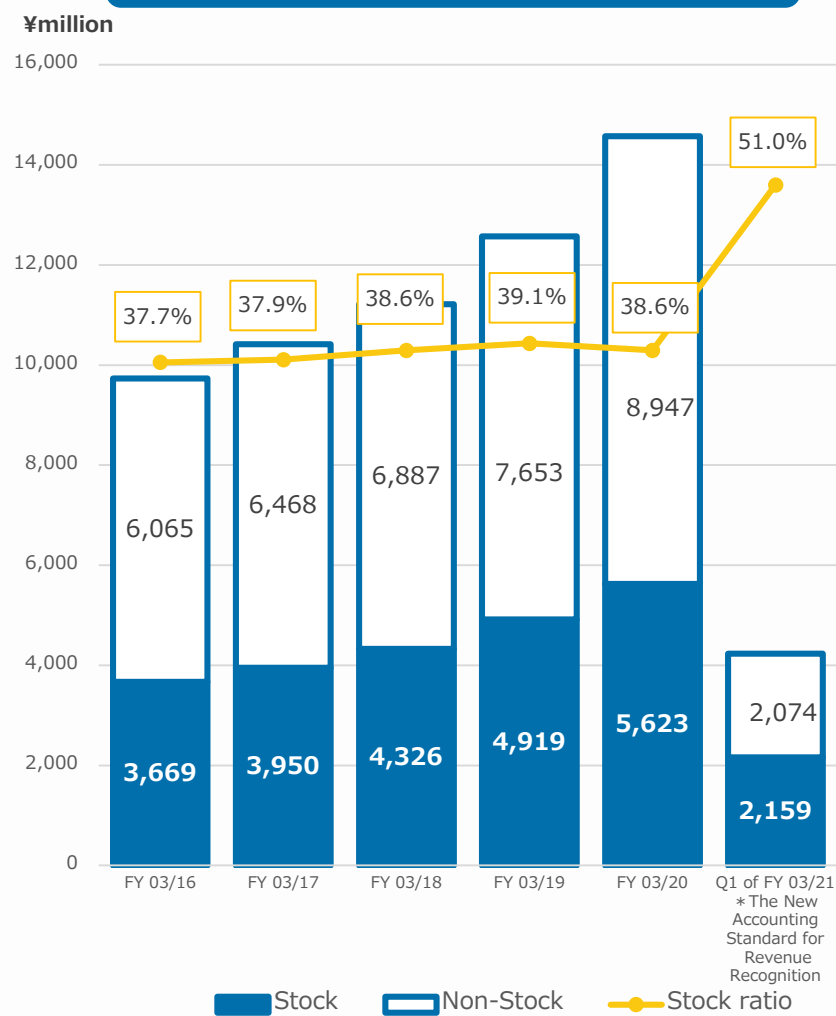
## Application Services Business



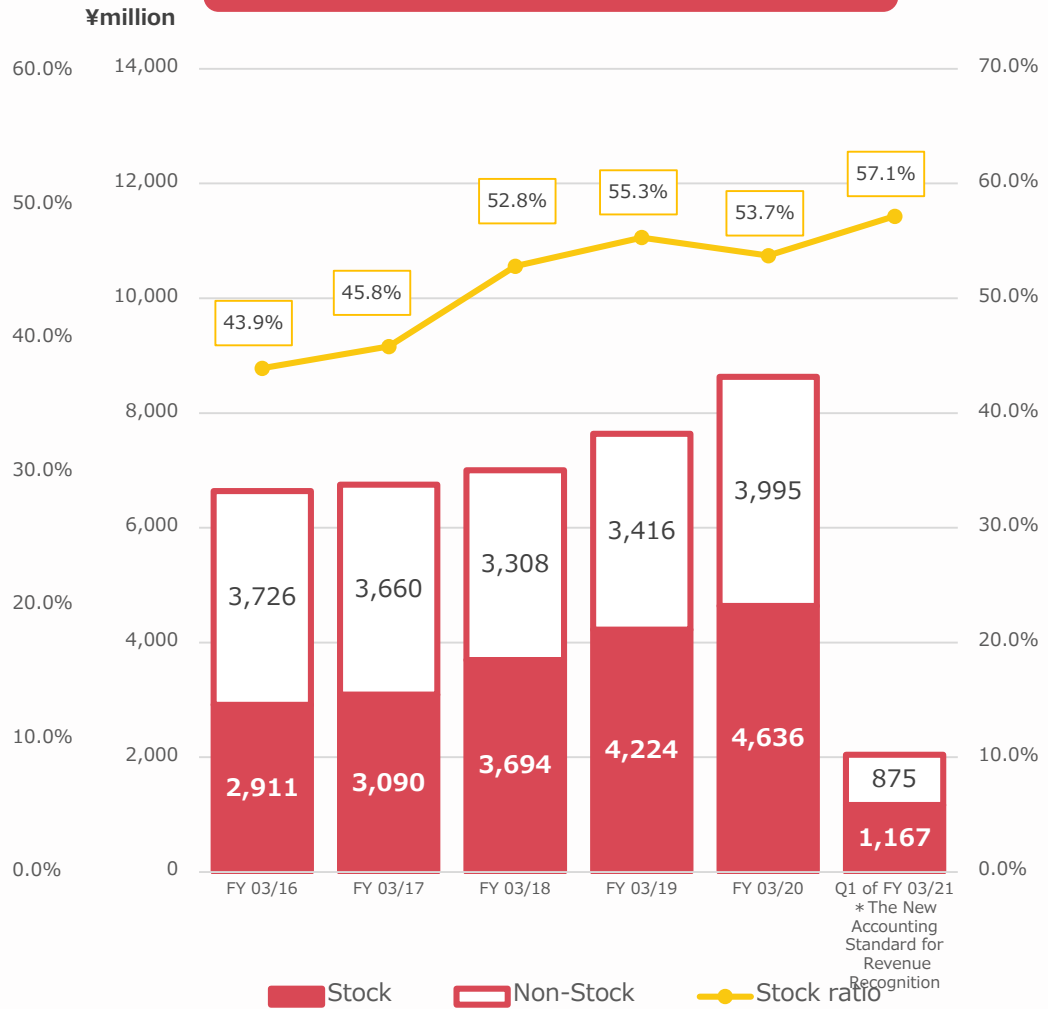
\* The New Accounting Standard for Revenue Recognition

# Stock type sales (Recurring revenue) ratio of TECHMATRIX and NOBORI

## Information Infrastructure Business



## Application Services Business



\* A part of revenue used to be recognized as Non-Stock revenue (e.g. 1st-year maintenance included in the products and subscriptions) were recognized as Stock revenue as a result of applying the New Accounting Standard for Revenue Recognition. Therefore, Stock ratio went up.

\* Stock ratio went up because a part of revenue used to be recognized as Non-Stock revenue (e.g. subscriptions for testing tools) were recognized as Stock revenue as a result of applying the Accounting Standard for Revenue Recognition and cloud business continues to grow.

# Balance sheet

- ◆ “Advance payments” included in Other of current assets and “Advance received” included in Other of Current liabilities were increased as a result of applying the New Accounting Standard for Revenue Recognition. (¥ : million)

	FY 03/20	Q1 of FY 03/21		FY 03/20	Q1 of FY 03/21
<b>Current assets</b>	<b>24,367</b>	<b>26,085</b>	<b>Current liabilities</b>	<b>11,908</b>	<b>14,546</b>
Cash and deposits	13,396	12,851	Accounts payable-trade	1,450	879
Notes and accounts receivable-trade	5,683	3,462	Short-term loans payable	450	450
Other	5,287	9,771	Current portion of long-term loans payable	250	225
<b>Noncurrent assets</b>	<b>5,256</b>	<b>5,785</b>	Other	9,758	12,991
Property, plant and equipment	1,318	1,392	<b>Noncurrent liabilities</b>	<b>2,709</b>	<b>2,669</b>
Goodwill	-	-	Long-term loans payable	900	850
Other	1,373	1,377	Other	1,809	1,819
Investments and other assets	2,565	3,016	<b>Total liabilities</b>	<b>14,618</b>	<b>17,215</b>
<b>Current assets</b>	<b>29,623</b>	<b>31,871</b>	Shareholders' equity	13,651	13,232
			Total accumulated other comprehensive income	6	53
			Subscription rights to share	77	83
			Non-controlling interests	1,269	1,286
			<b>Total net assets</b>	<b>15,005</b>	<b>14,656</b>
			<b>Total liabilities and net assets</b>	<b>29,623</b>	<b>31,871</b>

\* Equity ratio FY 3/20 : 46.1% FY Q1 of 3/21 : 41.7%

## 2. Topics of Business activities

# Products and services in Information Infrastructure Business



# Products and services in Information Infrastructure Business



a Hewlett Packard  
Enterprise company





## Rising demand for cloud security

### <Significant of unified security policy>

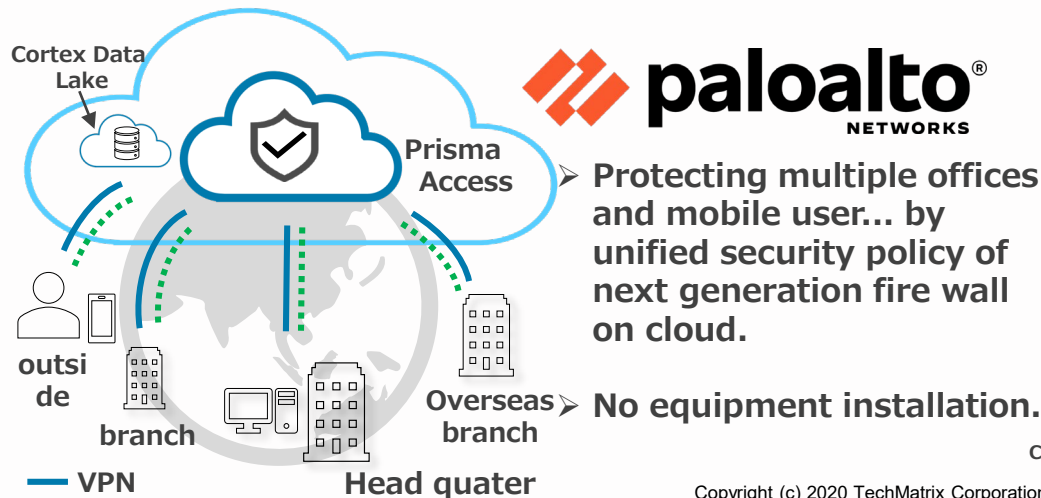
- Rising demands for remote access from home and unified security policy applied to many offices spread across the globe.

**Point !** 🖱️ Providing security services independent of location, device...etc.

**SASE** : Secure Access Service Edge(SASE) is a cloud service which provides **network and network security within a single framework.**

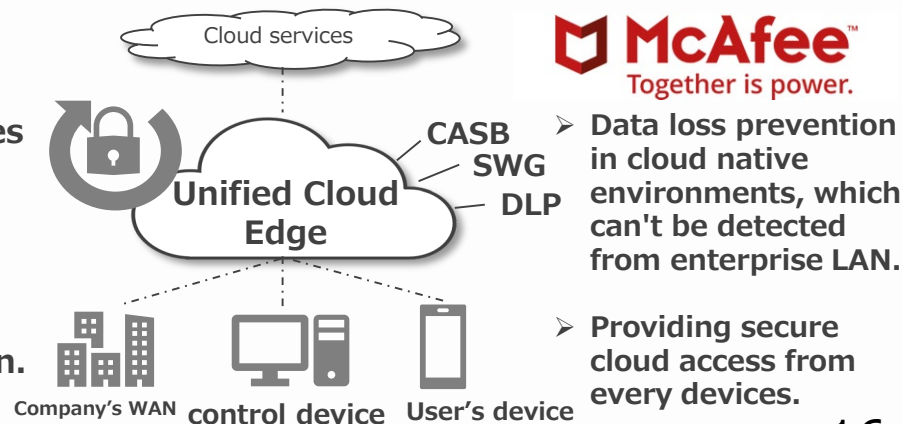
### Palo Alto Networks Prisma Access

~ Providing functions of next generation fire wall on cloud~



### McAfee MVISION Unified Cloud Edge

~Provides consistent data and threat protection controls from device to cloud~



## NOBORI

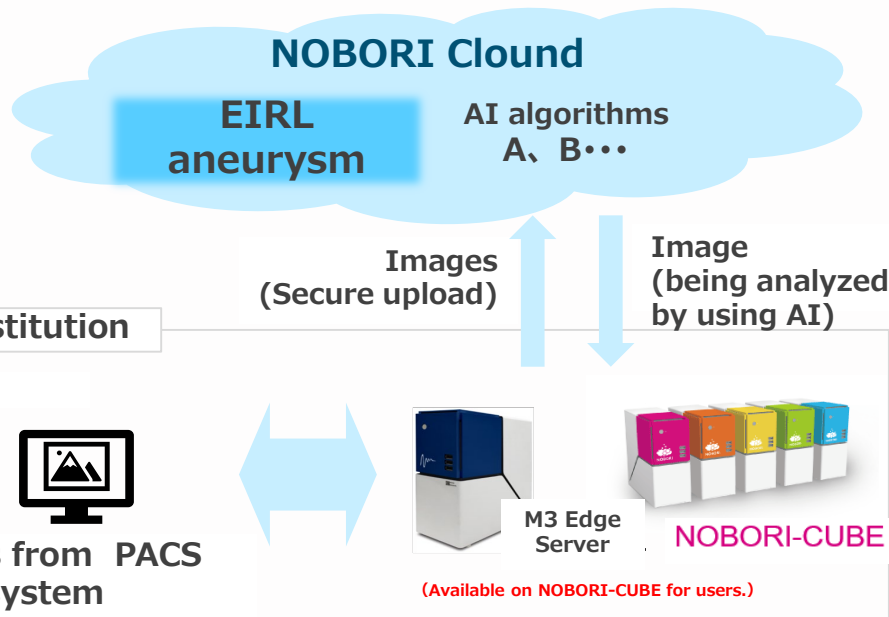
Business alliance agreement with M3, Inc.

Launch of AI Medical Image Diagnostics Platform Business

### <Accelerating AI support at Medical field>

- Point !** ➤ Many AI algorithms for medical Image Diagnosis will be ported onto AI platform built by NOBORI and M3, Inc .
- Multiple AI algorithms will be provided for each organ (brain, lung..) in the future.

~ Commenced the provision of EIRL aneurysm (LPIXEL Inc.) ~



### ◆ Supporting diagnosis by automatic detection of suspected cerebral aneurysm.

- ✓ Admitted improvement of diagnostic accuracy, compared to sensitivity ※ of examination made by a doctor alone. (77.2% > 68.2%)
- ✓ Obtained Japan's first regulatory approval on medical software in the field of brain-MRI by using deep learning.

※An indicator to correctly determine a disease to be positive.

## NOBORI

Commenced the provision of PHR service (official release)

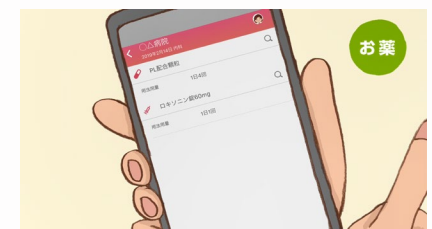
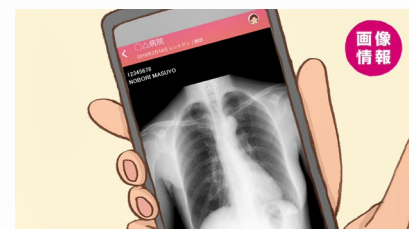
\* PHR : Personal Health Record is a concept to collect, store and use our medical · healthcare information by ourselves.

### <Service Concept : “医療ジブンゴト化”>

#### Managing your health independently and live your own life

- If everyone would be well and not ill.
- If we get a sick, we can communicate with our health care professionals and receive a treatment that makes you truly satisfied, without leaving everything to someone else.

Browse and manage medical information on our smartphone.



Demonstration experiment  
(from December 2018)  
3,800 users (End of April 2020)

## NOBORI

Capital and business alliance between NOBORI Ltd. and DeepTek Inc.

### <Implemented AI in remote image diagnosis system>

**Point !**

- Although medical needs are increasing, professional resources in service providers are very tight.
  - ⇒ Solutions using new technologies such as AI are required.
- DeepTek has high technological development capability.
- Expecting a synergy between DeepTek and NOBORI / ICHIGO
- Opportunity to explore business in India and utilization of medical data

**NOBORI** Ltd.

TechMatrix Group

- Provide medical information cloud service



**Investment**



- Implemented AI in remote image diagnosis system

## NOBORI Support status for COVID-19

### <Support for Early Settlement of COVID-19 >

- ◆ Support for medical professionals in collaboration with other companies and hospitals for free of charge.

➤ NOBORI Ltd. supported remote image diagnosis for the symptoms of COVID-19 by St. Marianna University School of Medicine Hospital for free of charge.

➤ NOBORI Ltd. Intends to provide 100 medical institutions nationwide with AI systems to support remote interpretation and image diagnosis for COVID-19 for free of charge. (a limited edition)

< St. Marianna University School of Medicine Hospital >

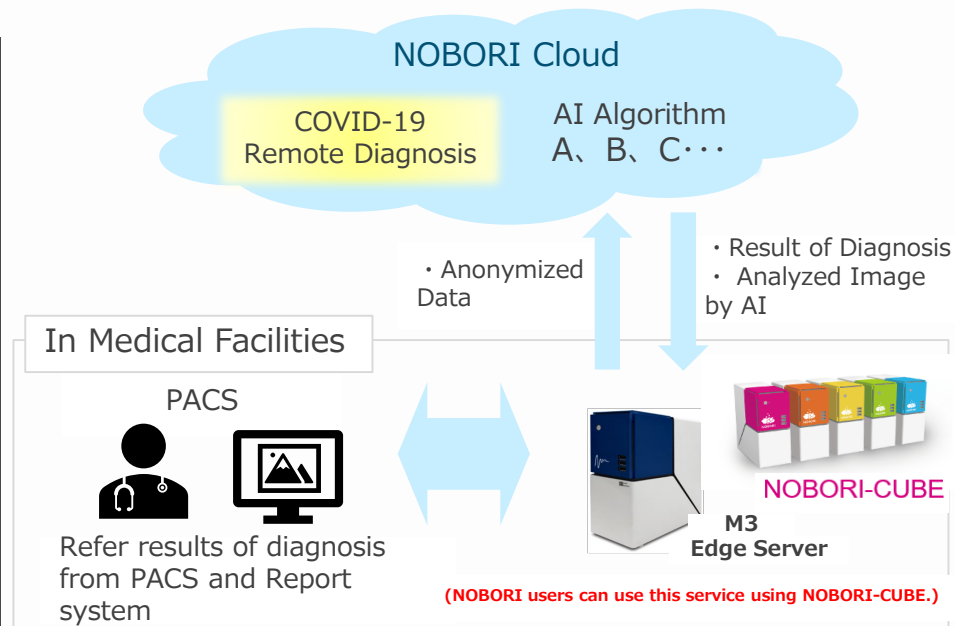
Image Diagnosis Supporting Service

Alibaba group, M3, Inc.



NOBORI Support

- ✓ Free rental of Remote Image Diagnosis Supporting System
- ✓ Management of Cooperation between companies
- ✓ Operate the Website of this service



**31,908,662**

The number of **patients** who stored medical images in NOBORI

**182,278,207**

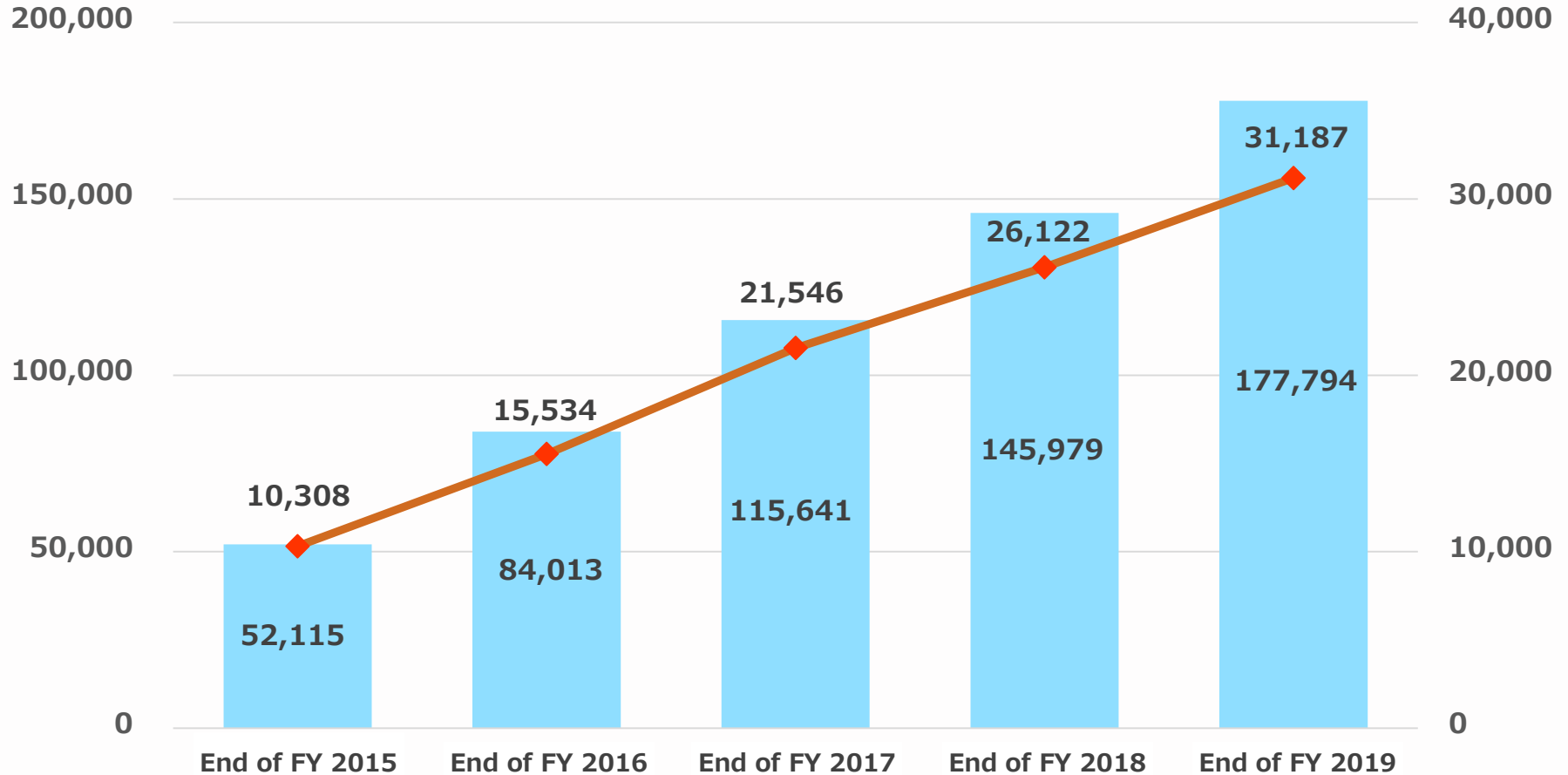
The number of **inspections** stored in NOBORI

(March 31 , 2020)

## Data stored in NOBORI

(Numbers of inspections : thousand)

(Numbers of patients : thousand)



■ The numbers of inspections stored in NOBORI (left vertical axis)
 ◆ The numbers of patients stored in NOBORI (right vertical axis)

Newly commenced the provision of “Parasoft Selenic”

## ➤ Parasoft Selenic enhanced Selenium\* framework with AI technology

\* Selenium : Framework of open source to record web browser operation and automate test. It is composed by multiple elements (components) , each one supports a realization of test automation of web application.



### ➤ Self-healing



### ● AI avoids test failures during testing.

→Can reduce the time spent for testing

### ➤ Recommendations

Selenium スクリプト作成時

現時点のWebアプリ

Locator	Confidence factor	Weight	Stability
@FindBy(name = "state_address")	98%	0.96	1.0
@FindBy(css = "div[font-type = input]")	90%	0.5	1.0
@FindBy(xpath = "//*[@id = 'input']")	90%	0.5	1.0

● Confidence Factor : ロケータの修正案に関する精度を表す  
● Weight : ロケータの優先づけを表す (編集可能)  
● Stability : 過去のテスト実行履歴に基づいてロケータの安定性に関する精度を表す

### ● AI provides recommendations by detecting program changes.

→Can reduce the maintenance workload

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### ➤ Analysis of UI testing

- Identify the testing required for verification of change point with application and release the new feature quickly.

### ➤ Chrome Expand Record

- Records and generates the scenario UI testing and API testing automatically.

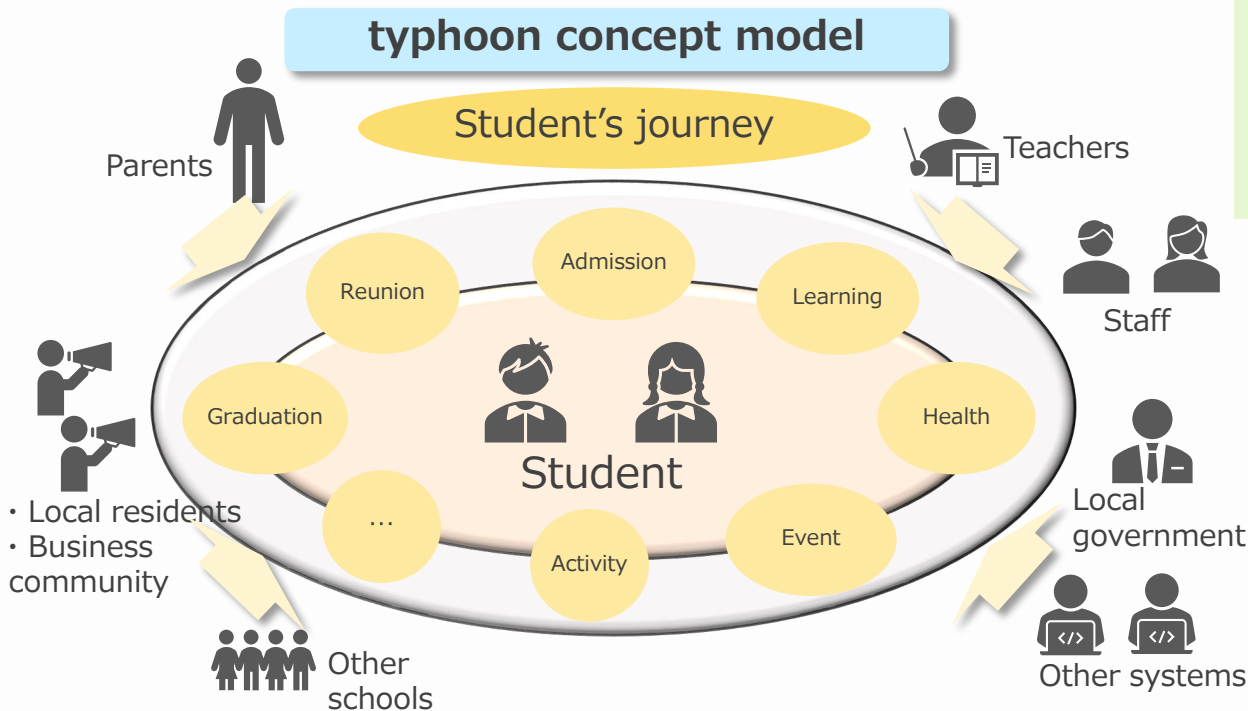


## Development and introduction of a new communication platform “typhoon” to realize personalized learning

**typhoon** : Integrated communication platform + school affairs support system

- Foundation system in which students continue to have a learning controller

**Point !** Integrated management of various touchpoints with a focus on students.  
**Visualize student’s journey** ⇒ Make best use of information stored in this platform.



<Karuizawa Kazakoshi school>  
➤ The school which combines a kindergarten, elementary school and junior high school opened in April 2020.

- ◆ Support students who decide how to spend their time.
- ◆ Support students so that they can spend different timetables.

- **Communication with various people**  
\* Parents⇔Students⇔Teachers • Staff etc..
- **Students manage their schedule and record their activities by themselves.**  
\* Learning plan and record of awareness
- Manage the general information of school affairs and students.  
\* Efficiency of communicating information

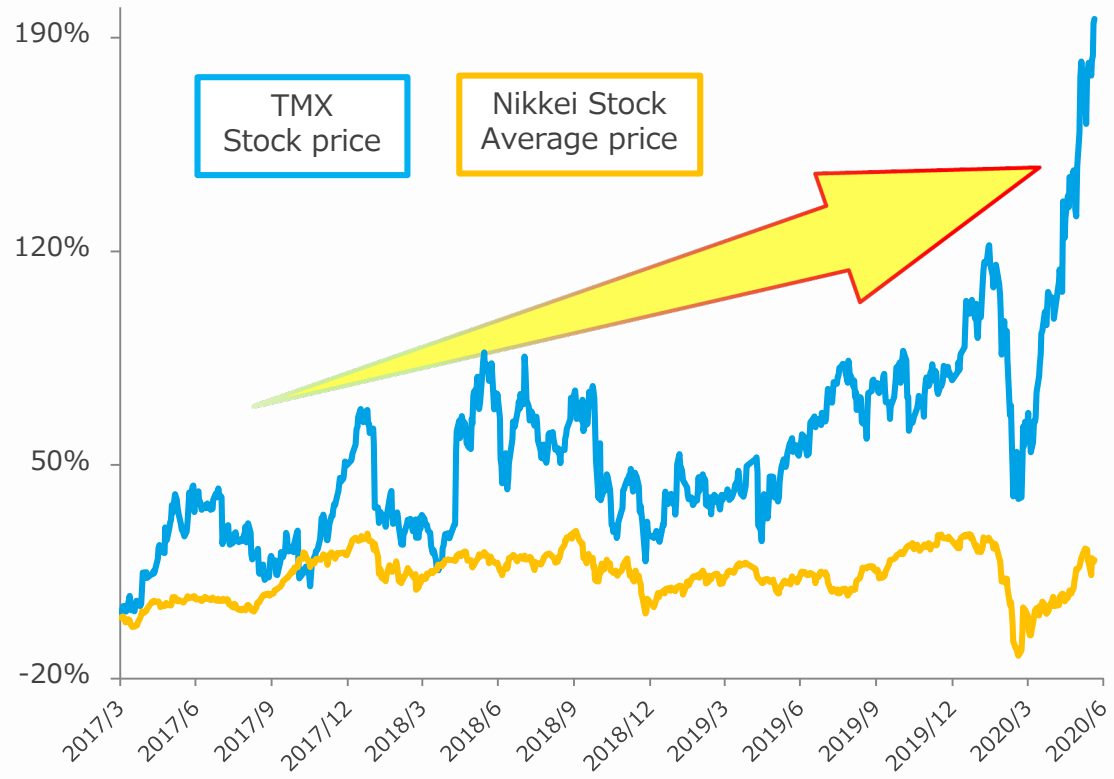
日付	内容
May	Business alliance between NOBORI Ltd. and M3, Inc.
	NOBORI Ltd. started providing PHR (Personal Health Record) service.
	Cross Head Co., Ltd. added a new feature in its own IT service "CROSSLINK series" that synchronizes with user information in cybozu.com and Office365.
	Capital and business alliance between NOBORI Ltd. and DeepTek Inc.
	Cross Head Co., Ltd. realized 97% remote work in 24 x 7 IT service center.
	Cross Head Co., Ltd. started providing "Easy! Connecting pack for remote work".
	NOBORI Ltd. will provide 100 medical institutions nationwide with AI systems to support remote interpretation and image diagnosis for COVID-19 for free of charge.
	Development and introduction of a new communication platform "typhoon" to realize personalized learning for students in Karuizawa Kazakoshi school.
	Commenced the provision of the latest version of "F3" for evaluation and analysis of financial instruments to be prepared for the end of LIBOR.

日付	内容
<b>June</b>	Notice of Stock Split, Partial Amendments to the Article of Incorporation and Shareholder Benefit Program.
	Agree on business alliance between NOBORI Ltd. and LPIXEL Inc. NOBORI Ltd. Started providing “EIRL aneurysm service” of LPIXEL Inc. on AI platform of supporting medical image diagnosis, which is operated with M3, Inc.
	Commenced the provision of “Parasoft Selenic” for strengthening a Selenium test with a Self-healing function and a recommendation function using AI technology.
	Cross Head CO., Ltd. started providing “CROSS HEAD Advanced Security Service” for preventing information leakage and productivity improvement in the era of telework.
	Cross Head CO., Ltd. started providing Bit Locker management solution “BitMana cloud service” for preventing information leakage and productivity improvement.
	NOBORI Ltd. started providing AI medical technology “COVID-19 pneumonia image analysis program Ali-M3”.
	Commenced the provision of the Japanese edition of Ranorex Version 9.3, UI test automation tool with the powerful object-recognition engine.

# Stock Splits

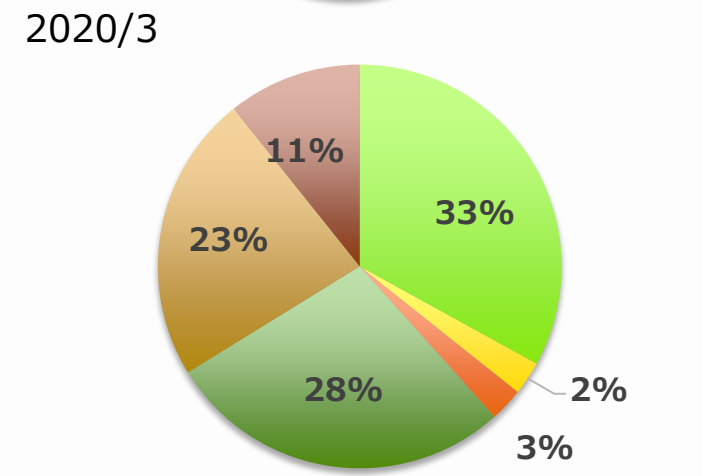
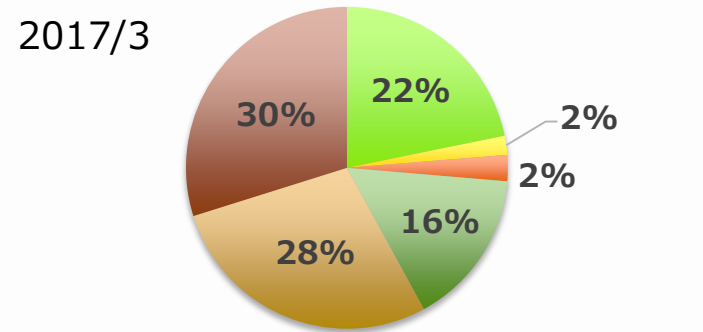
- ◆ Implement 2-for-1 stock splits (base date: June 30<sup>th</sup>, 2020, effective date: July 1<sup>st</sup>, 2020) to increase the liquidity and broaden its investor base.

## Stock price performance



- The graph was made based on market data as of the end of March, 2017.
- Announced stock split after the close of stock market on June 1st, 2020.

## Shareholder composition



- Financial institution
- financial instruments business operator
- Other corporations
- Foreign corporation
- Individual, Others
- Treasury stock

# 3. Medium-Term Management Plan "GO BEYOND 3.0"

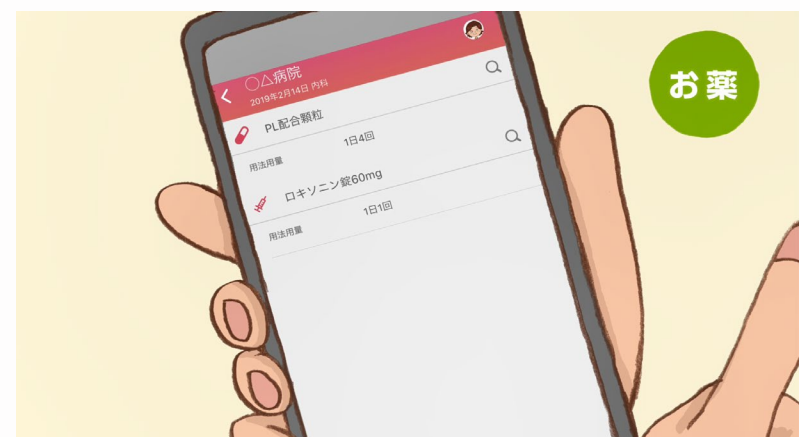
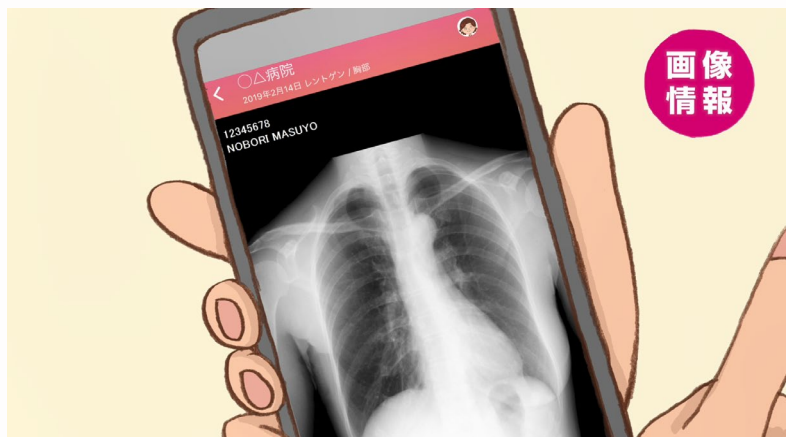
We continue business strategy of TMX 3.0

- **Strategic and accelerated promotion of cloud-related businesses**
- **Pursuit of security and safety**

- 1 Diversification of business operating structure (conclusion of a business/capital alliance, cooperation with universities and research institutions, open innovation)
- 2 Accelerated servicization (in the whole areas)
- 3 Utilization of data (including usage of AI)
- 4 Enter B2C businesses
- 5 Rapid expansion of businesses in overseas markets (next step out of market research phase)
- 6 Strengthen business management foundation (cross-group/effective utilization of human resources and technology, new value created by combination of expertise accumulated in each filed, investment in human resources and development of next-generation management, Recruitment/human resource development/evaluation/retention based on corporate philosophy)
- 7 M&A (including usage of treasury stocks)

## NOBORI

PHR (Personal Health Record) service for individuals (for patients)





## TechMatrix Premium Support powered by TRINITY

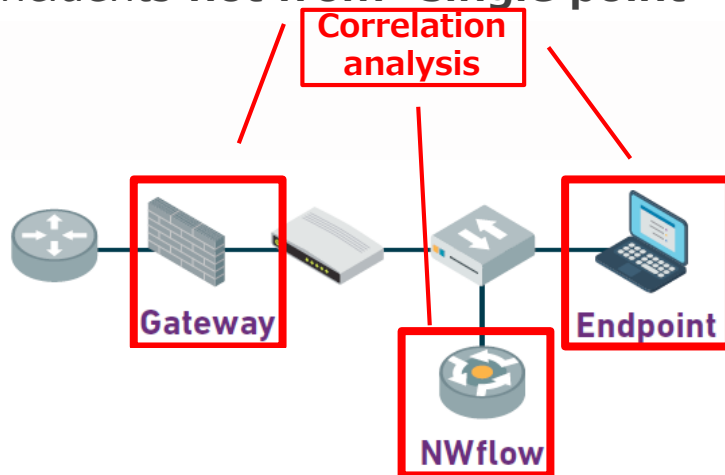
Integrated security monitoring service using correlation analysis rules created based on hundreds of threat scenario patterns originally developed by TechMatrix

※TRINITY is TechMatrix's original service to undertake operations and monitoring for ICT infrastructure.

### ■ Issues of conventional single device monitoring

- 1) Conventional single monitoring results in a **“point” analysis** of events.
- 2) If **the person in charge of operation** and **the monitoring vendor are different for each product**, the investigation, Information sharing, and **primary response are delayed**.
- 3) Because encrypted communication is increasing and sophisticated attack techniques are prevailing, **communication difficult to be monitored and analyzed is increasing**.

■ Our comprehensive integrated security monitoring service detects cyber security incidents **not from “single point” but from “multiple points”**

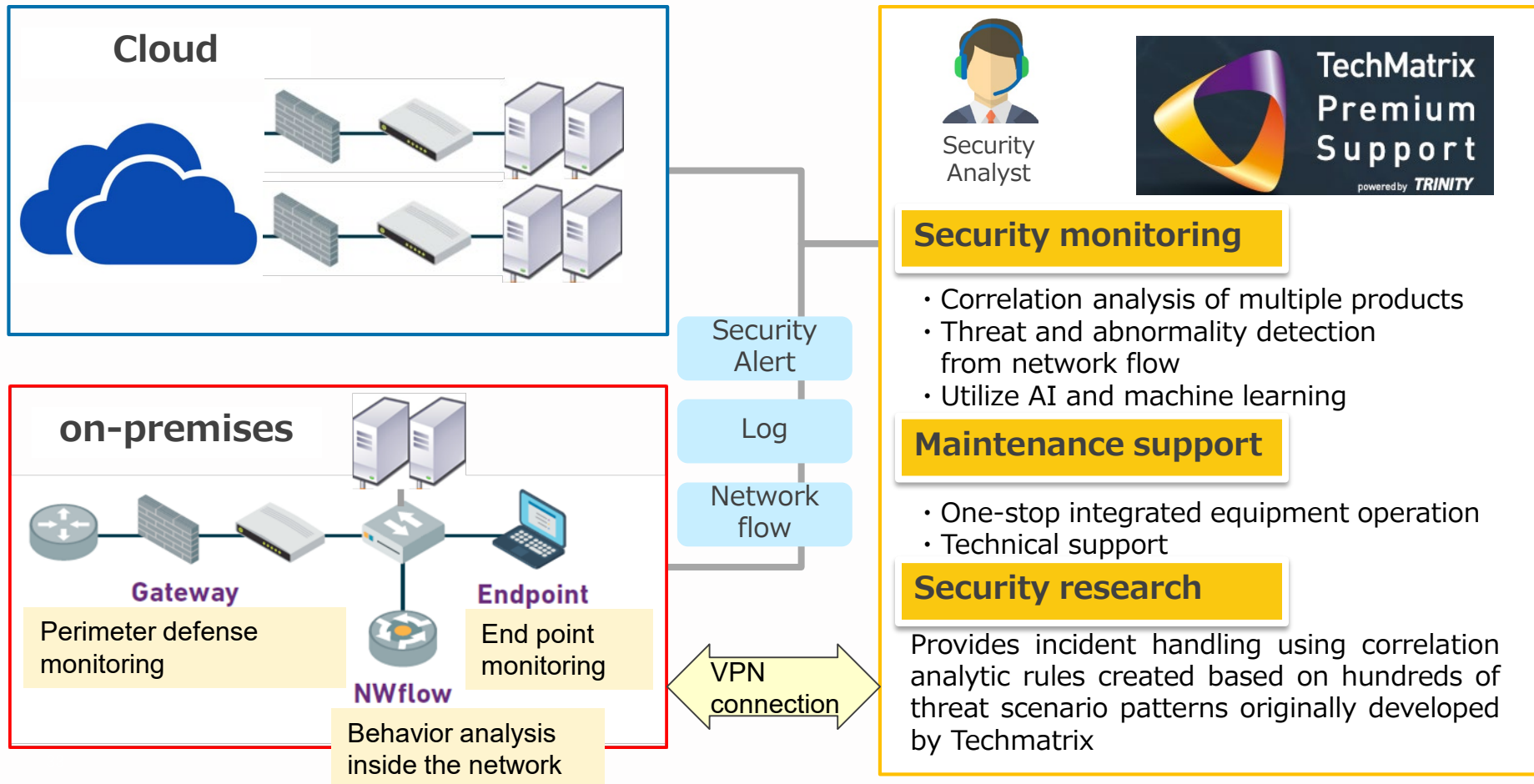


「TechMatrix Premium Support powered by TRINITY」, **our comprehensive integrated security monitoring service** analyzes correlation using data captured at the gateways, at the end-points and from network flows (not from “single point” but from “multiple points”) within the enterprise network, which can detect a variety of security incidents and strengthen the cyber security platform to be able to protect enterprises from unknown malware.

## TechMatrix Premium Support powered by TRINITY

Provides "comprehensive threat detection and visualization" and "security operation efficiency". We will strengthen the cyber security platform to be able to protect enterprises from unknown malware.

※TRINITY is TechMatrix's original service to undertake operations and monitoring for ICT infrastructure.

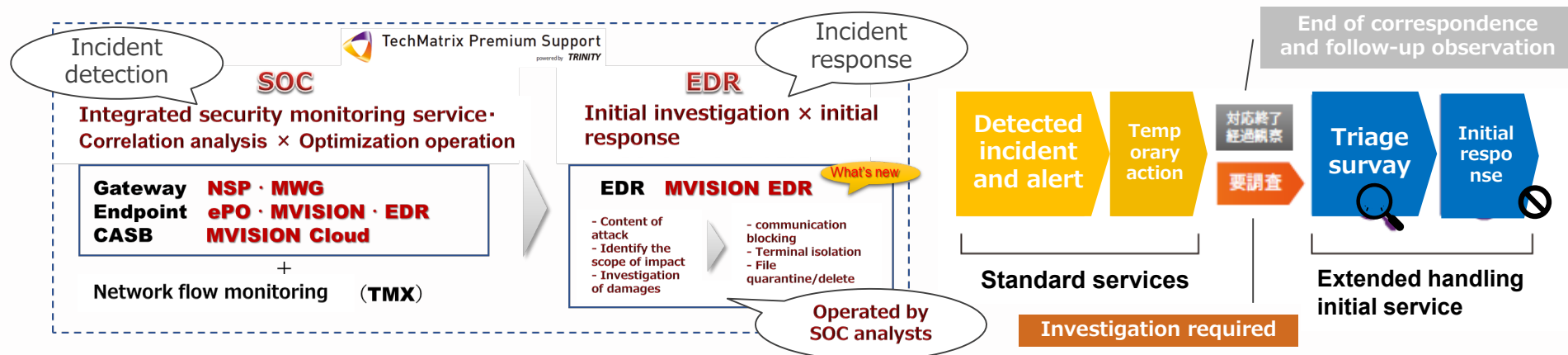


## TechMatrix Premium Support powered by TRINITY

Collaborated with McAfee in area of EDR

~Expanded incident response service by adding the use of “McAfee MVISION EDR”

※TRINITY is TechMatrix’s original service to undertake the operations and monitoring for ICT infrastructure.



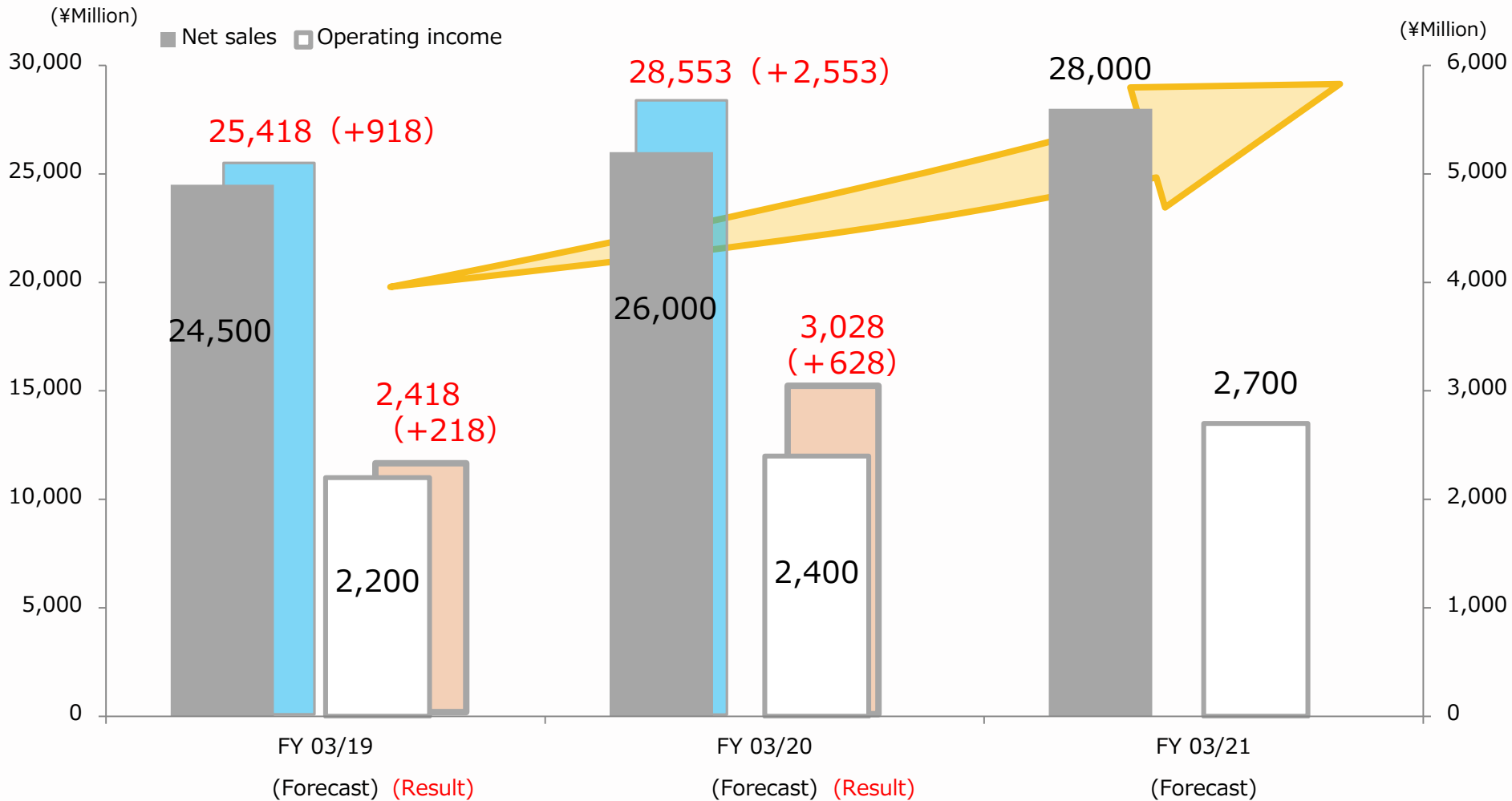
**Point !** Security analysts proactively operate MVISION EDR from Security Operation Center(SOC) to conduct initial survey and initial response, which strengthens the foundation of security operations.

### 【Overview】

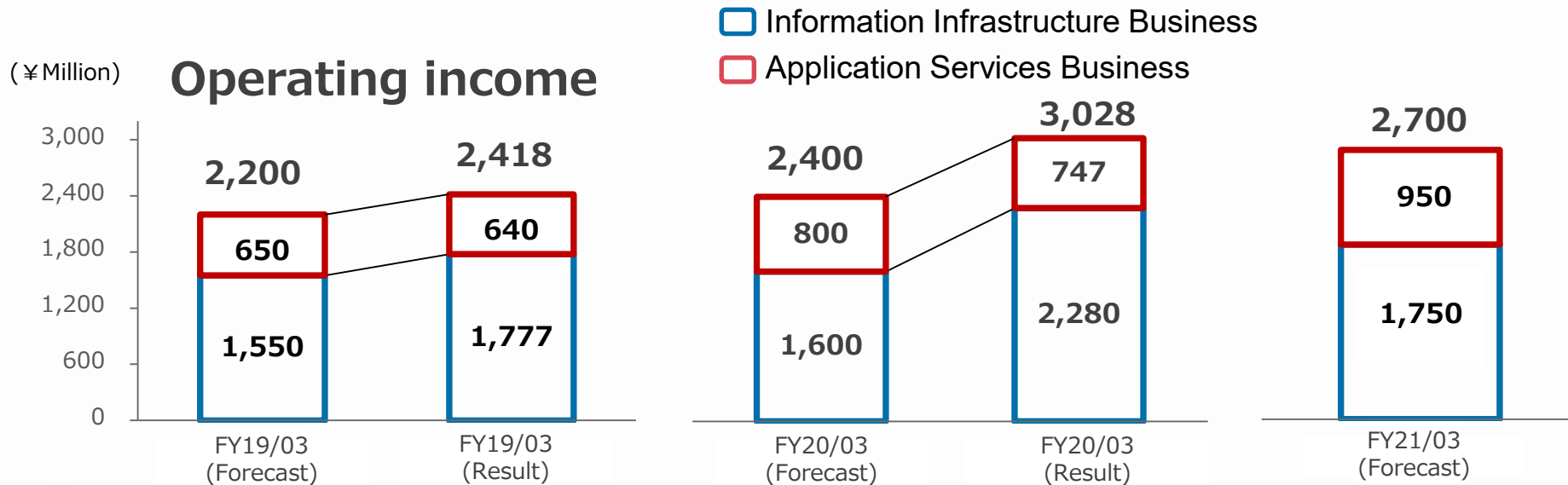
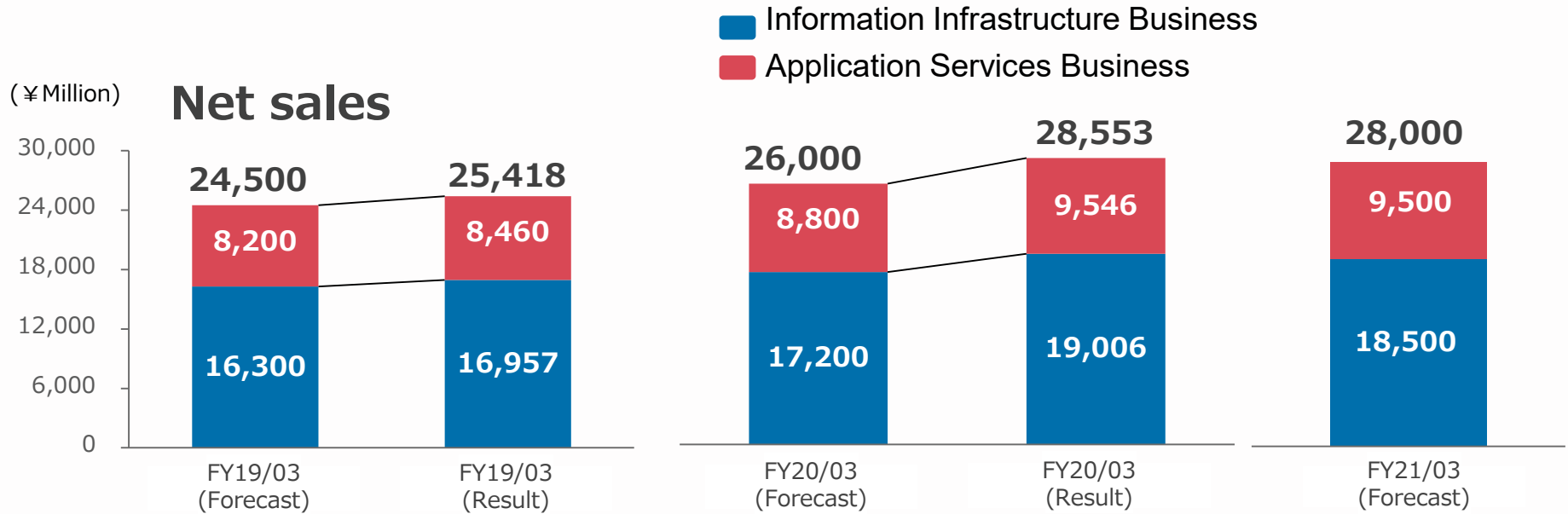
- Collecting each event alert through integrated security monitoring.
- Correlate each event alert detected by MVISION EDR.
- Based on analysis, security analysts proactively operate MVISION EDR from Security Operation Center(SOC) before notifying the clients of an incident.

# Planned value of GO BEYOND 3.0

## Increased net sales and operating income continuously



# Planned value of GO BEYOND 3.0



# Change of well-balanced business

## Information Infrastructure Business

	FY 03/19 – FY 03/21 (forecast)
Net sales CAGR(%)	5.3
Operating income CAGR(%)	4.1
FY 03/21(forecast)	
Operating income to net sales(%)	9.5
FY 03/20(result)	(11.9)
FY 03/19(result)	(10.5)
FY 03/18(result)	( 9.8)

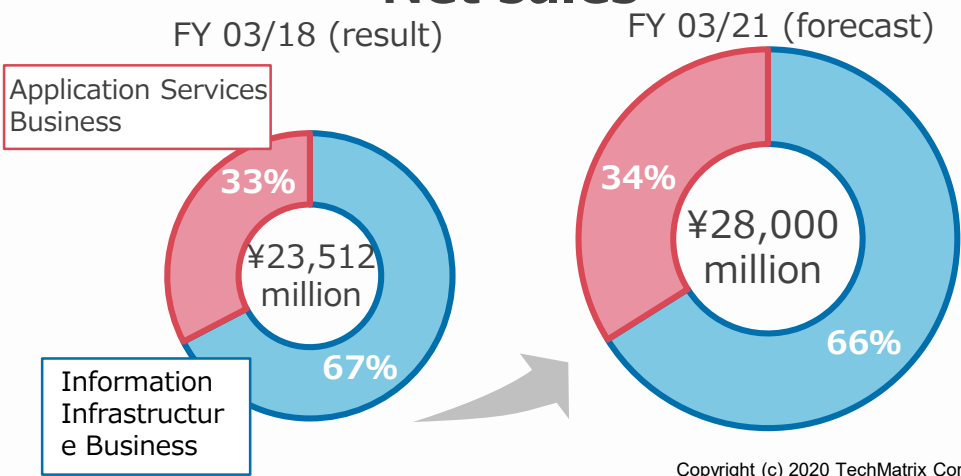
## Application Services Business

	FY 03/19 – FY 03/21 (forecast)
Net sales CAGR(%)	7.4
Operating income CAGR(%)	39.6
FY 03/21(forecast)	
Operating income to net sales(%)	10.0
FY 03/20(result)	(7.8)
FY 03/19(result)	(7.6)
FY 03/18(result)	(4.5)

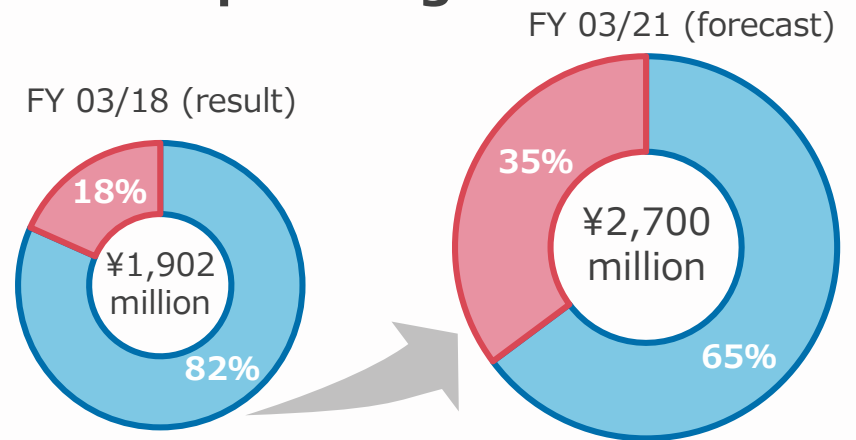
※We put more efforts to build high-value-added services by ourselves so that we can aggressively change business structure and differentiate our businesses.

※Profit will increase due to the growth of cloud businesses.

### Net sales



### Operating income





# The IT professional group who creates a better future



# 4. Business Models



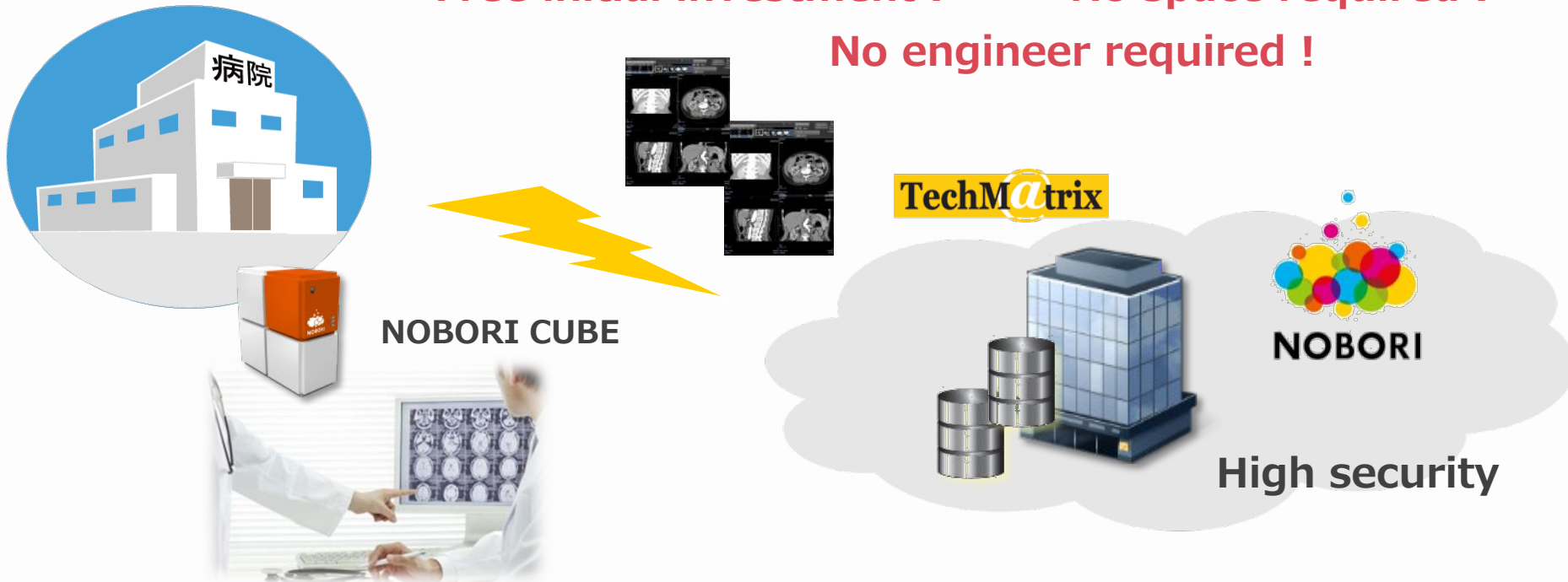
**Point!**

A cloud service for healthcare information "NOBORI". We store, share and utilize valuable medical information securely in a cloud environment.

**Free initial investment !**

**No space required !**

**No engineer required !**



- We started to provide NOBORI in Cloud PACS market so quickly. Medical Institutions can deploy NOBORI at a low price and in a short period of time.
- The number of medical facilities using NOBORI has been increasing by introduction to large-scale hospitals and through strong partnership.
- We provide a platform for other healthcare services "NOBORI PAL".

**Point!**

Enhancing the competitiveness of customers' businesses by CRM system.

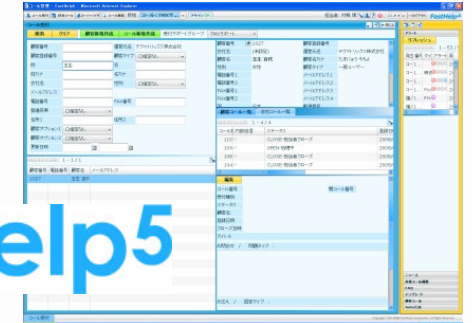
- Contacts about products
- Contacts after purchase



Products



## FastHelp5



Unified management of purchase histories and the past Q&A's

Quick search !

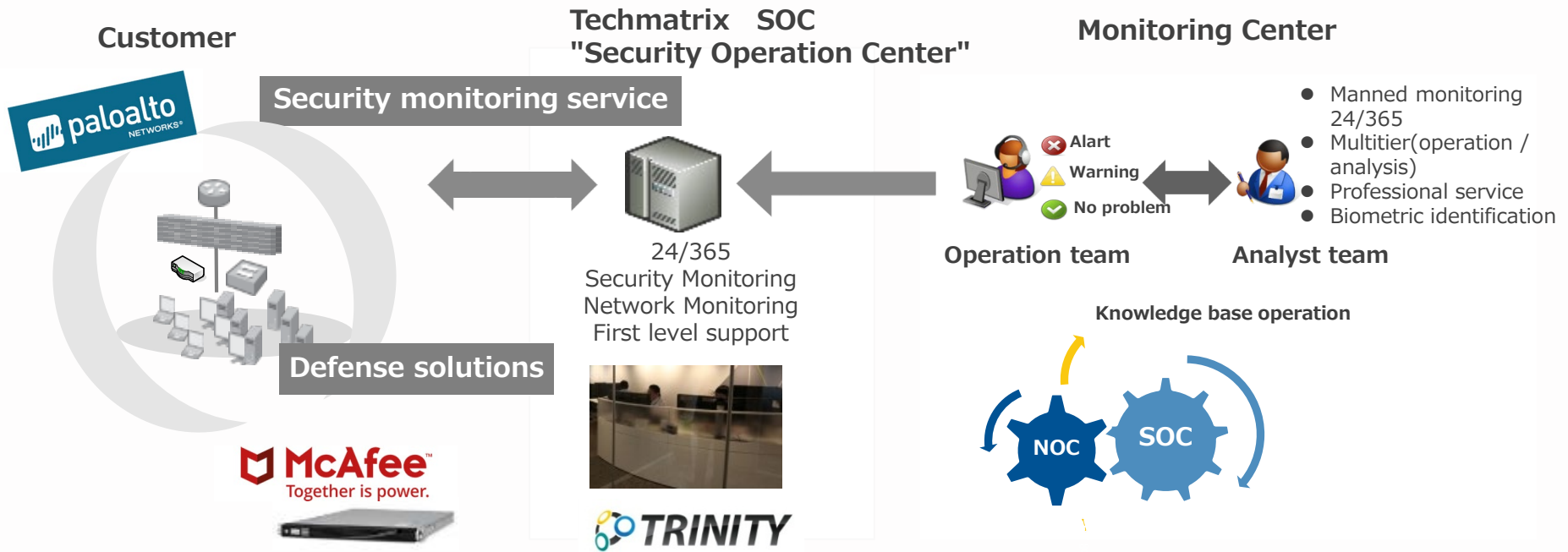


Quick response to the customers' Inquiries !



Improvement of customer satisfaction !

**Point!** One-stop solution from Techmatrix.



## One-stop solution

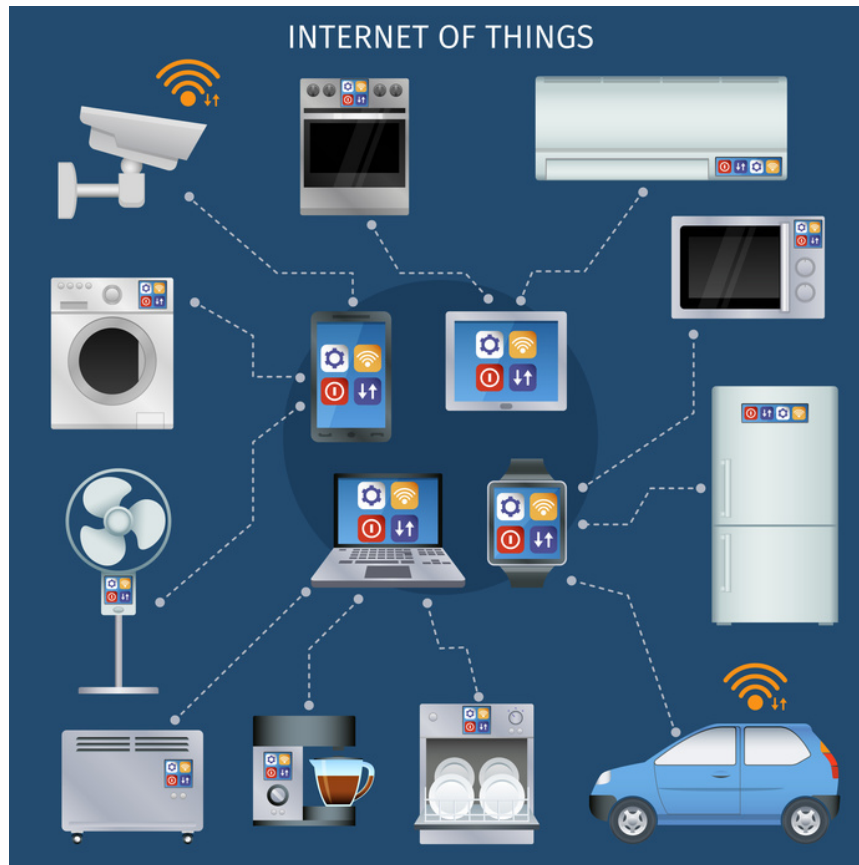
One-stop solution for system design, integration, maintenance, operation and monitoring services.

## Professional service with expert knowledges

Techmatrix provides security monitoring services based on its in-depth knowledge on the products it delivers, although other security vendors provide basic services for a wide variety of products.

**Point!**

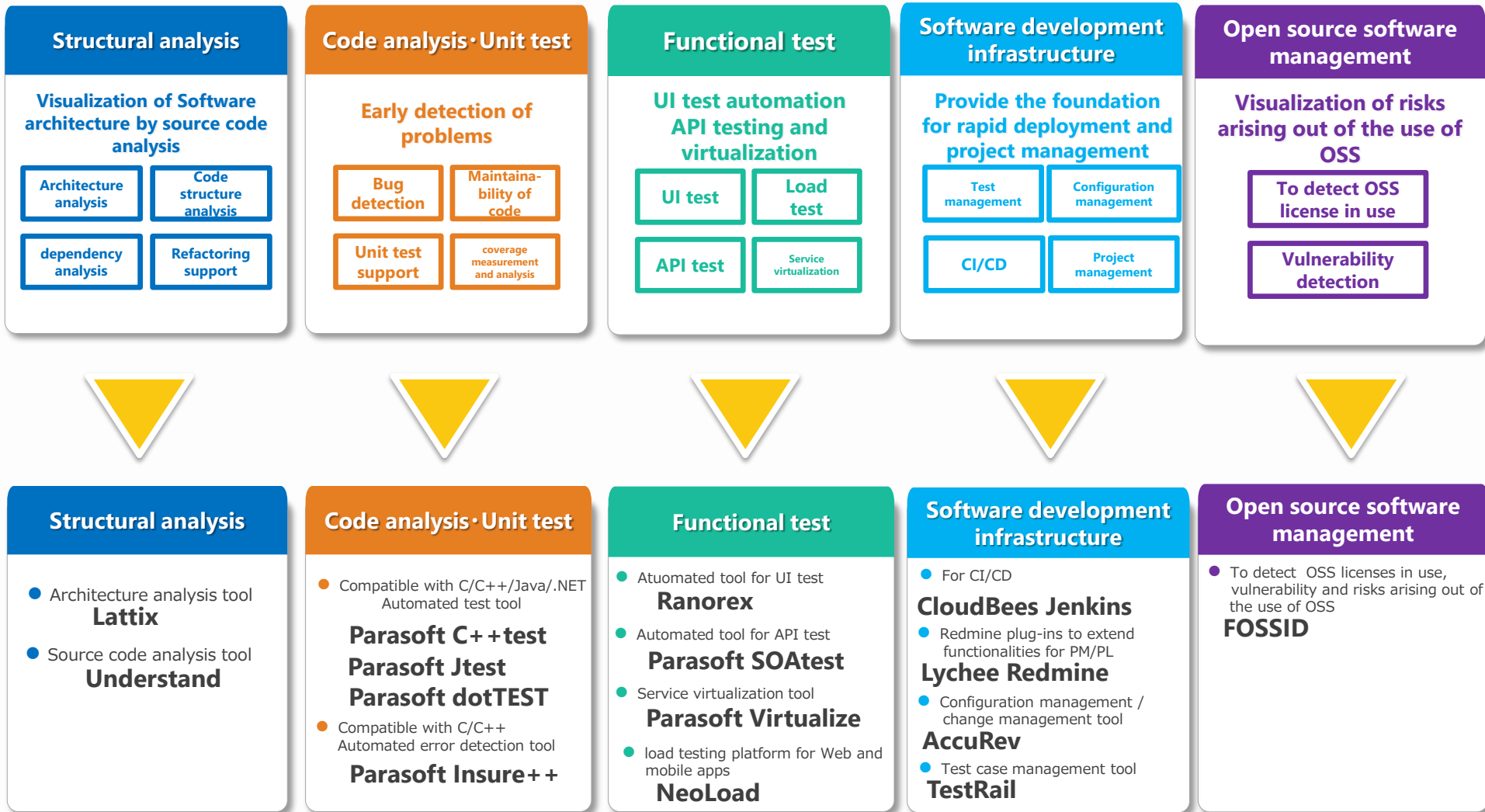
Every internet-connected device can be a target for cyber-attacks in the IoT era.



- ▶ Solution for test, systems design and version control system
- ▶ Integration of infrastructure, training and operation support for development process
- ▶ Support for substantive improvement of software quality and productivity enhancement

**Improve quality of embedded software**  
**Comply with functional safety standards**

# Software Quality Assurance field

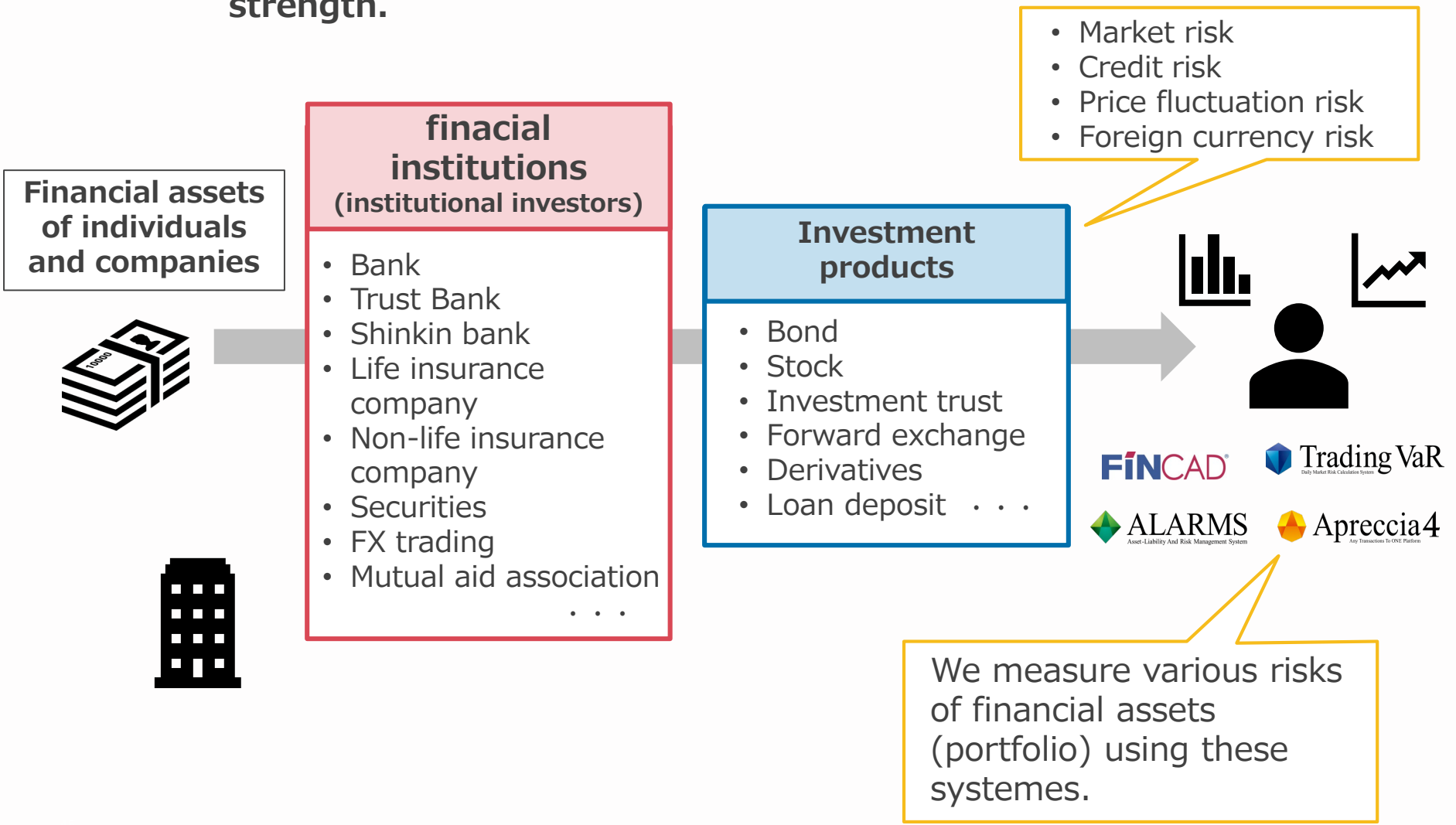


# SOLUTION

# Financial field

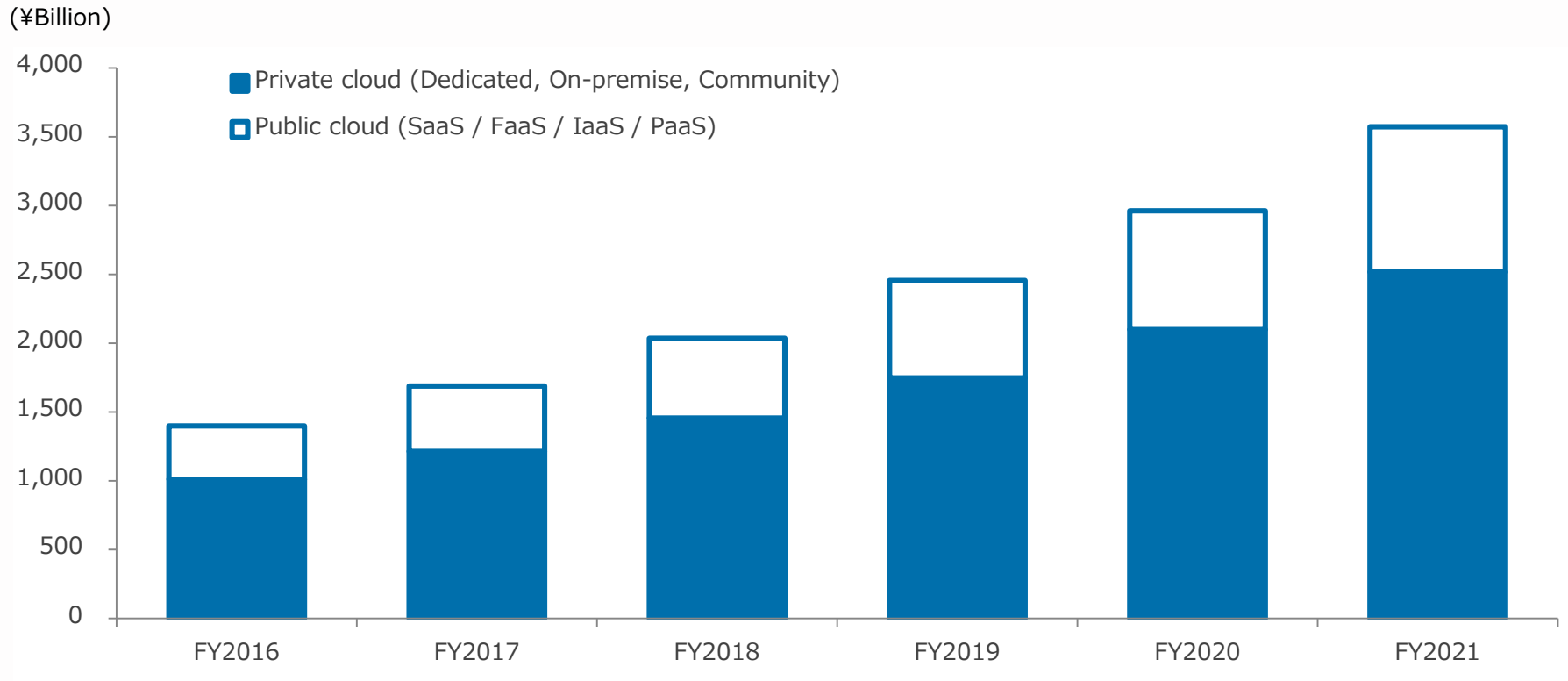
**Point!**

Provision of risk management systems for financial institutions who manage financial assets so that they can maintain financial strength.



# 5. Market Conditions for our business

## Market Conditions for our business

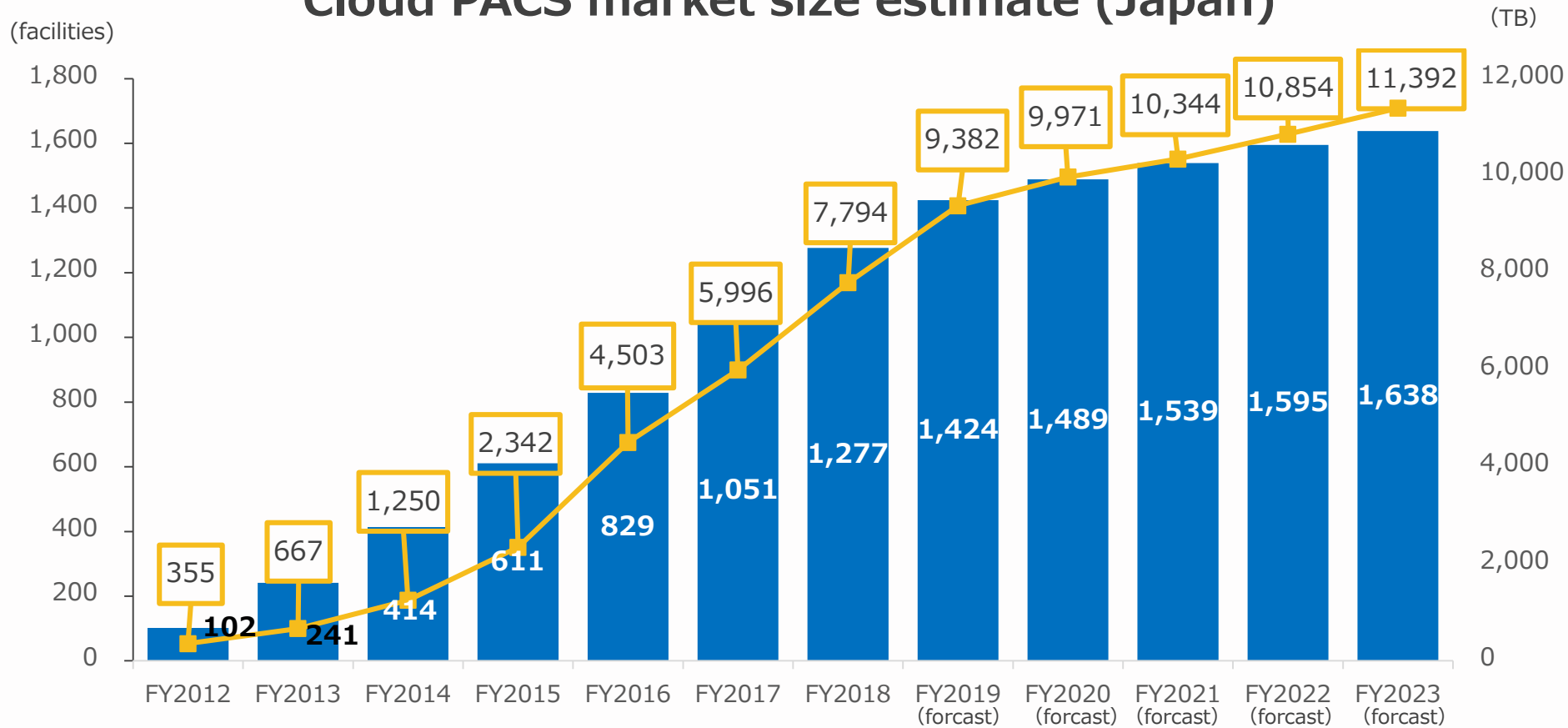


◆ Domestic cloud market size was ¥1,400.3 billion in 2016 (38.5% up year on year) and it expand to ¥3,571.3 billion in FY2021.

\* Reference : Cloud business market report 2017 (27,Dec,2017) by MM Research Institute



## Cloud PACS market size estimate (Japan)



\* Estimate as of Jan, 2020

■ Number of contracted facilities

— Estimated capacity

◆ Number of contracted facilities using cloud PACS was forecasted to be 1,424 as of the end of FY2019 in Japan. The number of facilities have steadily increased.

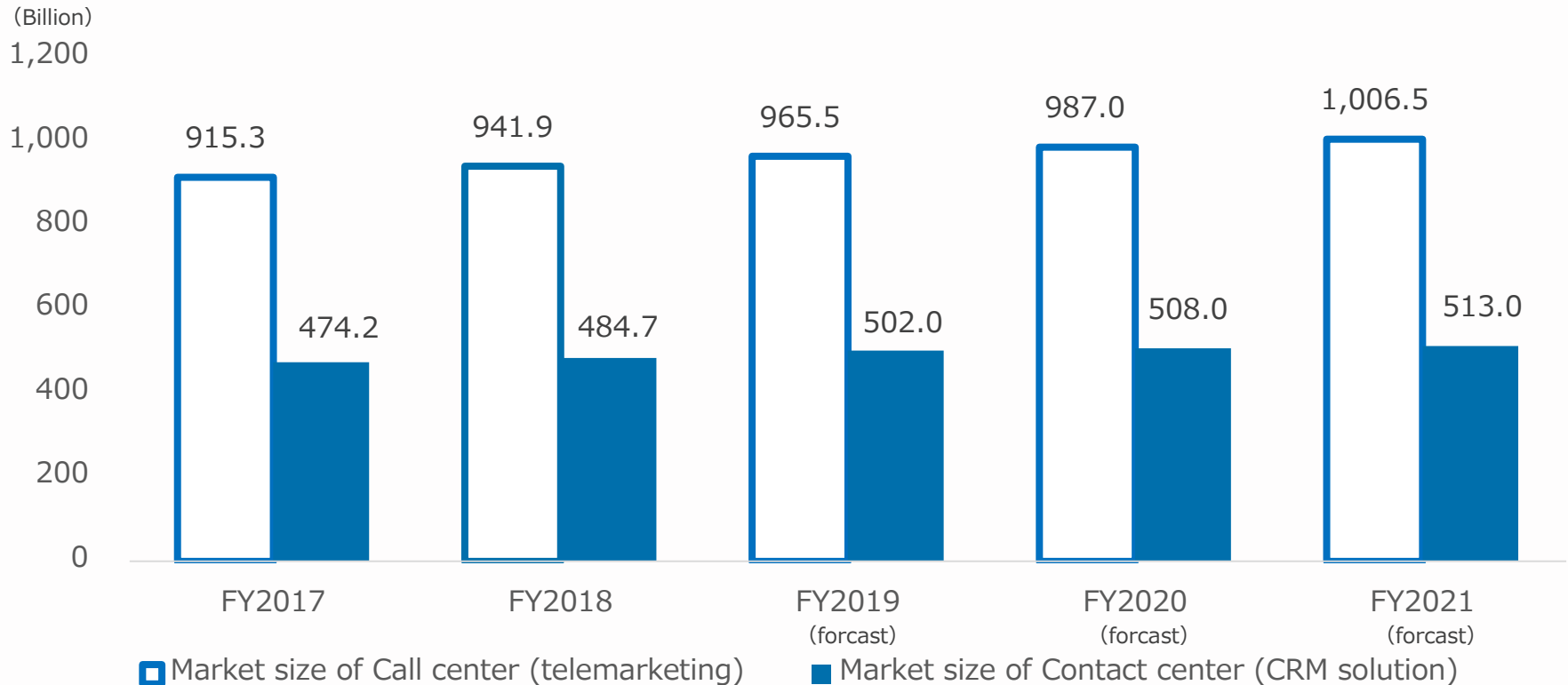
\* Reference : 2019 edition Medical image system (PACS), perspectives and strategies of related equipment market(Jan,2019) by Yano Research Institute Ltd.

## Type of PACS Cloud

Cloud type	Brief summary	Feature	Configuration image	NOBOR I
TYPE 1	Store both short term and long term data in a in-house server + data center (dual storage for all data)	Data back up in a data center Additional costs		—
TYPE 2	Store short term data in on-premise servers + long term data in a data center	Frequently used data in a hospital Additional costs		—
TYPE 3	All data in data center without in-house server (only cash in NOBORI appliance)	No additional costs and lower price range		

◆ Techmatrix is ahead in the healthcare cloud business with "NOBORI" which is installable at a low price and in short term.

## CRM software market size (Japan)



\*Service provider's sales. Estimate as of Oct, 2018

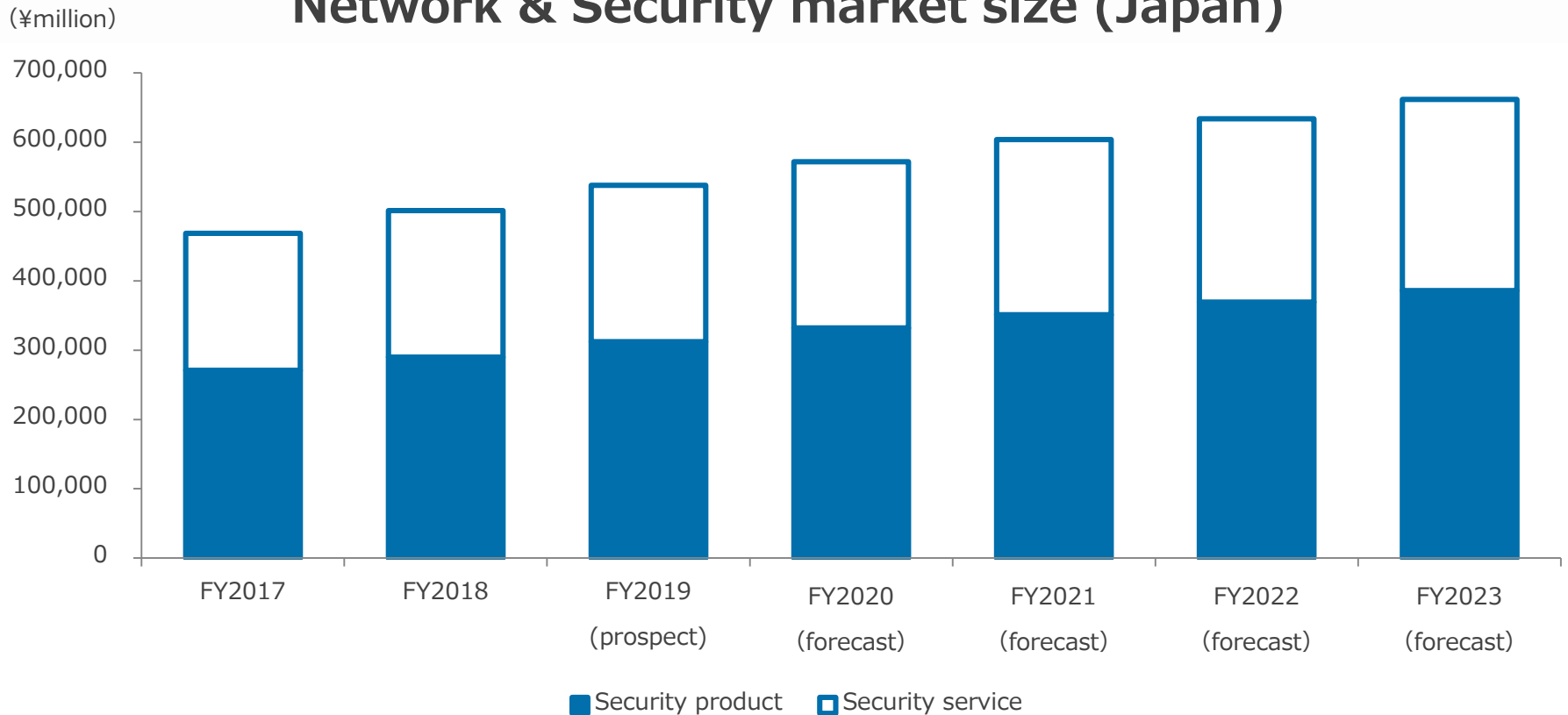
- ◆Market size of Call center (telemarketing) in FY2018 is to ¥981.9 billion, up by around 2.9% from FY2017.
- ◆Market size of Contact center (CRM Solution) in FY2018 is ¥484.7 billion, up by around 2.2% from FY2017.

Call center (telemarketing) have steady increased the demands of outsourcing in client company due to lack of human resources.

Contact center (CRM Solution) have dealt with multi-channelization.

\* Reference : 矢野経済研究所「コールセンターサービス市場/コンタクトセンターソリューション市場の調査 (2018年)」

## Network & Security market size (Japan)



◆ Forecasted Networks Security business market in Japan expanding from ¥468.7 billion in FY2017 to ¥661.7 billion in FY2023.

◆ High growth rate on average at 5.7% has been forecasted.

\* 出所：「2019 Network security business research stars (market edition)」  
by Fuji Chimera Research Institute, Inc.



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