

IC-AJCC 2023

International Conference on ASEAN-JAPAN Cybersecurity Community

The Current State of the Cybersecurity Market in Japan ~and related activities for it's growth~

Itsuro Nishimoto
President and Representative Director
LAC Co.,Ltd.

2023.10.06



Itsuro Nishimoto

President, CEO LAC Co., Ltd.

CISSP



Joined LAC Corporation in 1986. He served as a programmer, responsible for the development and planning of numerous information and communications systems.

In 2000, he moved into the security business, building and launching JSOC, one of the largest security centers in Japan. In April 2017, he assumed the role of Representative Director and President of the company. He has lectured on information security measures at government offices, universities, public corporations, companies, IT events, seminars, etc., he also works as a commentator on newspapers and web medias, TV news programs, etc.

- External Activities

Outside Director, BroadBand Tower Corp.
Director and Secretary General, Japan Smartphone Security Association (JSSEC)
Director, Security Camp Council, a general incorporated association
Director, Japan Cyber Crime Center (JC3)
Representative Director, Cyber Security Career Support Association (JTAG)
Advisor, National Liaison Committee for Grassroots Cyber Security (Grafsec)
Served as a member of Cabinet Secretariat, Information Security Policy Council, Awareness and Human Resource Development Specialist Committee
Served as a member of the Ministry of Internal Affairs and Communications, Smartphone Cloud Security Study Group
Served as a member of the Ministry of Economy, Trade and Industry, Cyber Security and Economic Research Group
Served as a member of the National Police Agency, General Security Council

- Achievements

Commendation from the Director-General of the International Information and Communications Strategy Bureau, Ministry of Internal Affairs and Communications, Information Security Culture Award 2013

- Author

"The truth of cyber war that countries, companies and media never talk about"
(KADOKAWA Publishing)
"Cyber self-defense starting right now: how to prevent identity theft, unauthorized access...?" (Nikkei e-Shinsho)

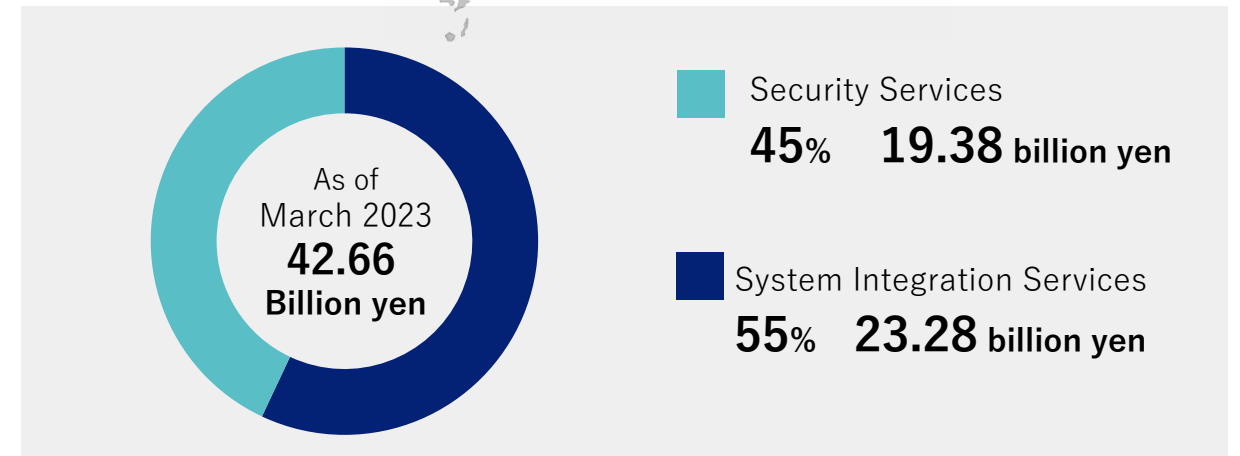
Company Outline



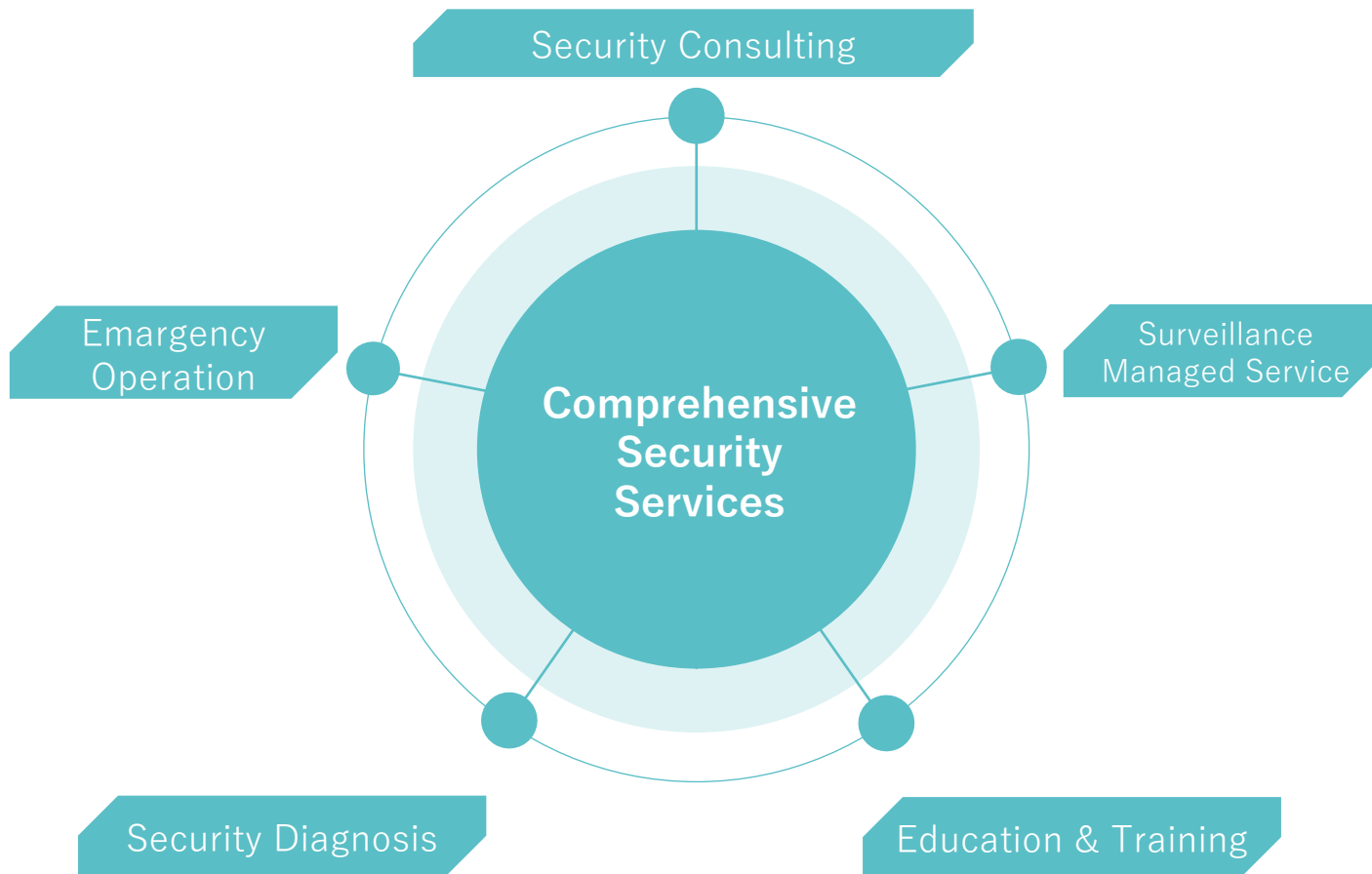
Our Purpose

Building A Trusted Society With Reliable Technology

Company Name	LAC Co., Ltd.
Business	Cyber Security Services System Integration Services Sales and service of information system related products
Head Office	Hirakawa-cho Mori Tower 2-16-2 Hirakawa-cho, Chiyoda-ku Tokyo 102-0093
Local Office	Toyochō Office Nagoya Office Fukuoka Office LAC Techno Center Kitakyushu LAC Techno Center Akihabara LAC Techno Center Asahikawa Singapore Branch
Number of Employees	2,172 (as of April 2023)
Establishment	2007 October 1 (Founded in Sep 1986)
Capital	2,848,075,000 yen
Sales	42.6 billion yen (as of Mar 2023)



With our industry-leading technological capabilities, we provide advanced security services to various major companies and government agencies



Abundant security personnel

Number of Security Service Employee **Approx 728**

Registered Information Security Specialist **169**

Knowledge of the latest cyberattacks

Number of cyber incidents handled (FY2022) **Approx 500**

Cloud Security Managed Service with AI Technology

Cyber Security Market in Japan



NPO Japan Network Security Association
<https://www.jnsa.org/en/aboutus/>



Established as a a voluntary association at Apr 2000. 268 Companies joined (as of Sep 2023)
 They conduct a wide range activities related to Cyber Security and published some research reports in English.

SecBoK 2021(Education Committee) <SecBoK 2021 -Security Body of Knowledge>

Survey Report of Information Security Incident

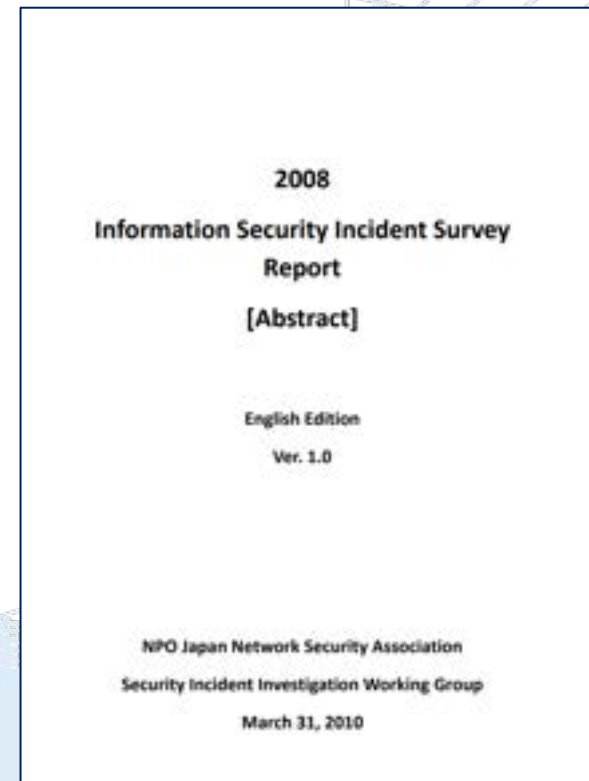
Security knowledge field (SecBoK) Human resources skill map 2021 edition Overall arrangement table

* Created by the Information Security Knowledge Base (SecBoK) Revision Committee, Education Subcommittee, Japan Network Security Association

Required knowledge and skills for each role

<Level of knowledge and skills>

2021 FY	Old FY	NSA ID	Job / New Job	Field	Category	Subcategory	Level	ESR (Knowledge, Skill, Ability) Description	ESR (Knowledge, Skill, Ability) Description	ESR (Knowledge, Skill, Ability) Description	ESR (Knowledge, Skill, Ability) Description	ESR (Knowledge, Skill, Ability) Description	ESR (Knowledge, Skill, Ability) Description	ESR (Knowledge, Skill, Ability) Description	ESR (Knowledge, Skill, Ability) Description	ESR (Knowledge, Skill, Ability) Description	ESR (Knowledge, Skill, Ability) Description	ESR (Knowledge, Skill, Ability) Description	ESR (Knowledge, Skill, Ability) Description
1	1	K0010	Similar Term as Old NSA	ES Basic	1 Mathematical and Physical		1	Knowledge of mathematics (eg. logarithms, trigonometry, linear algebra, calculus, statistics, and operational analysis)											
2	2	K0010	Similar Term as Old NSA	ES Basic	2 Computer/Communication	Engineering	1	Knowledge of electrical engineering as applied to computer architecture (eg. circuit boards, processors, chips, and computer hardware)											
3	3	K0010	Same Term as Old NSA	ES Basic	2 Computer/Communication	Engineering	1	Knowledge of human-computer interaction principles											
4	4	K0010	Same Term as Old NSA	ES Basic	2 Computer/Communication	Engineering	1	Knowledge of microprocessors											
5	5	K0010	Similar Term as Old NSA	ES Basic	2 Computer/Communication	Engineering	1	Knowledge of basic skills/items across the network (eg. Transmission Control Protocol (TCP) and Internet Protocol (IP) Core System Interconnection Model (ICM) Information Technology Infrastructure Library (latest version) (ITIL))											
6	6	K0100	Similar Term as Old NSA	ES Basic	2 Computer/Communication	Engineering	1	Knowledge of concepts, technology, and operations of a wide range of communications media (computer and telephone networks, satellite, fiber, wireless)											
7	7	K0100	Similar Term as Old NSA	ES Basic	2 Computer/Communication	Engineering	1	Knowledge of physical computer components and architectures, including the functions of various components and peripherals (eg. CPUs, Network Interface Cards, data storage)											
8	8	K0110	Similar Term as Old NSA	ES Basic	2 Computer/Communication	Engineering	1	Knowledge of different types of network communication (eg. LAN, WAN, MAN, WLAN, 5G/LTE)											
9	9	K2110	Similar Term as Old NSA	ES Basic	2 Computer/Communication	Engineering	1	Knowledge of electronic devices (eg. computer systems/components, access control devices, digital cameras, digital scanners, electronic sensors, hard drives, memory cards, modems, network components, networked appliances, networked home control devices, printers, removable storage devices, telephones, copiers, security hardware, etc.)											
10	10	K0110	Similar Term as Old NSA	ES Basic	2 Computer/Communication	Engineering	1	Knowledge of Wi-Fi											
11	11	K0300	Similar Term as Old NSA	ES Basic	2 Computer/Communication	Engineering	1	Knowledge of computer networking fundamentals (ie. basic computer components of a network, types of networks, etc.)											





JNSA Security Market Survey Report 2022

2022年 国内情報セキュリティ市場調査報告書 (セキュリティ市場調査ワーキンググループ)

2022.7.31掲載

※本用のご連絡及び内容に関するお問い合わせは、
 「各種公開資料の引用及び、内容に関するお問合せ」をご確認ください。

情報セキュリティ市場調査について

NPO日本ネットワークセキュリティ協会（JNSA）では2004年度から2009年度まで経済産業省委託事業として、2010年度からはJNSA独自の事業として、セキュリティ市場調査WGが調査業務を引き継ぎ、現在まで継続実施しています。
 調査内容は国内における情報セキュリティに関するツール、サービスの提供を行う事業者を対象とし、推定市場規模データの算出、集計、調査、分析を行い、成果物として毎年公開しています。2019年度より、近年の国内情報セキュリティ市場の変化を捉え、セキュリティ区分、調査内容の見直しを行い【新分類】の成果物として公開しました。
 2022年度も、引き続き【新分類】の調査様式で市場調査を行いました。これまで15年以上の歴史ある調査を継続しながら、国内情報セキュリティ産業の発展を支え、未来の予測に活用できる成果物の提供を目的としています。

調査/分析方法

- ・セキュリティ市場とセキュリティ産業の姿を継続的に捉える
 - ・調査結果をJNSA会員企業のそれぞれの事業に役立ててもらう
 - ・WGメンバーが活動を通じ、交流し、調査の手法を学び、知見を広げる
- これらのポリシーのもと、JNSA会員の、会員による、会員のためのセキュリティ市場調査として独自の調査活動を行っております。

2022年 調査報告書作成メンバー

- ・ワーキンググループリーダー
 - (正) 橋本 良輔 (国産計装株式会社)
 - (副) 玉川 博之 (AKKODISコンサルティング株式会社)
- ・ワーキンググループメンバー (五十名)
 - 新井 聡 (NTTビジネスソリューションズ株式会社)
 - 土村 尚史 (株式会社サイバーディフェンス研究所)
 - 遠藤 憲次 (株式会社セクレスコ・デジタルテクノロジー)
 - 虎井 真 (国産計装株式会社)
 - 北浦 義朗 (S&Bテクノロジー株式会社)
 - 神崎 裕一郎 (東芝ITサービス株式会社)
 - 佐藤 亮 (株式会社日立ソリューションズ・クリエイト)
 - 西村 真一 (株式会社セクレスコ・デジタルテクノロジー)
 - 美濃 英孝 (株式会社アイネス総合研究所)
 - 福岡 かよ子 (株式会社インテック)
 - 原 祐樹 (S&Bテクノロジー株式会社)
 - 塚田 賢一 (三井物産セキュアディレクション株式会社)
 - 七田 一秀 (東芝ITサービス株式会社)
 - 藤川 琢磨 (S&Bテクノロジー株式会社)

2022年 国内情報セキュリティ市場調査

[「2022年度 国内情報セキュリティ市場調査報告書」ダウンロード \(PDF:4.5MB\)](#)

Domestic Security Market Survey Report 2022

https://www.jnsa.org/result/surv_mrk/2023/2022_securitymarket.pdf



日本のサイバーセキュリティを「連携」「学び」「創造」

国内情報セキュリティ市場 2022年度調査報告

2021年度 売上高	推定実績値
2022年度 売上高	推定見込値
2023年度 売上高	予測値

2023年6月26日

JNSA調査研究部会
セキュリティ市場調査WG

JNSAセキュリティ市場調査WGメンバー

■ワーキンググループリーダー

(正) 福部 良輔	興安計装株式会社
(副) 玉川 博之	AKKODISコンサルティング株式会社

■メンバー (五十音順)

新井 聡	NTTビジネスソリューションズ株式会社
上杉 尚史	株式会社サイバーディフェンス研究所
遠藤 恵太	株式会社クレスコ・デジタルテクノロジーズ
梶井 勇	興安計装株式会社
北浦 義朗	SBテクノロジー株式会社
熊崎 裕一郎	東芝ITサービス株式会社
虎熊 克	株式会社日立ソリューションズ・クリエイト
西村 奏一	株式会社クレスコ・デジタルテクノロジーズ
清瀬 英彦	株式会社アイネス総合研究所
福岡 かよ子	株式会社インテック
星 裕樹	SBテクノロジー株式会社
増田 聖一	三井物産セキュアディレクション株式会社
松田 一秀	東芝ITサービス株式会社
植川 琢磨	SBテクノロジー株式会社

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JNSA Security Market Survey Report 2022

https://www.jnsa.org/result/surv_mrk/2023/2022_securitymarket.pdf



<Outline>

Unique Survey Activity by JNSA member

- 2004 Start survey as a government project (METI)
- 2010 Changed JNSA original survey from 2010
- 2020 revised survey items and market classification

Security market research by JNSA members, for JNSA members

- **Continuously** monitor the security market and security industry.
- Have the survey results **be useful for the business** of JNSA member companies.
- Learning research methods from each other through research activities.

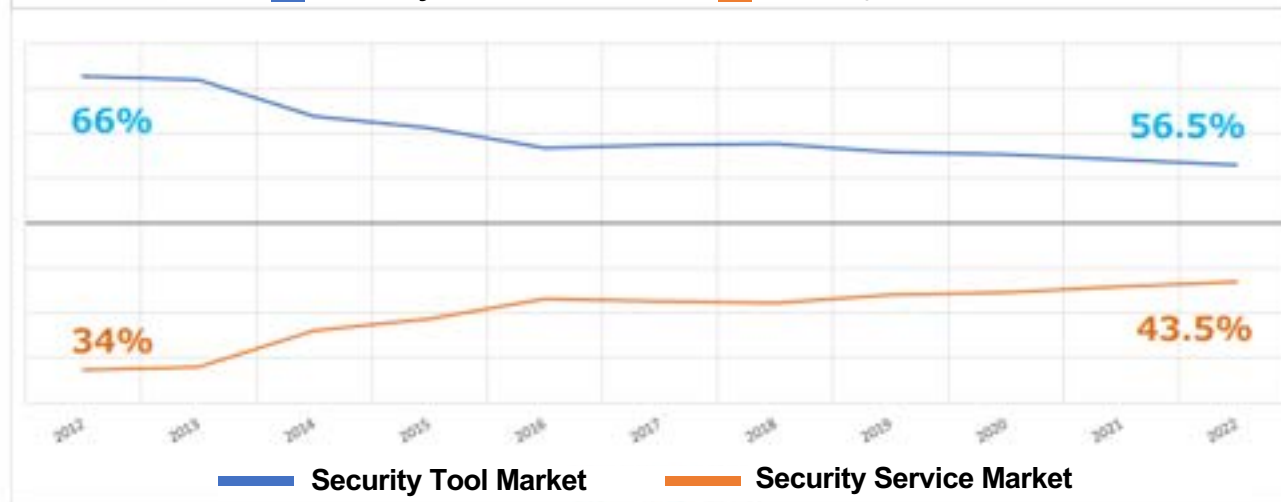
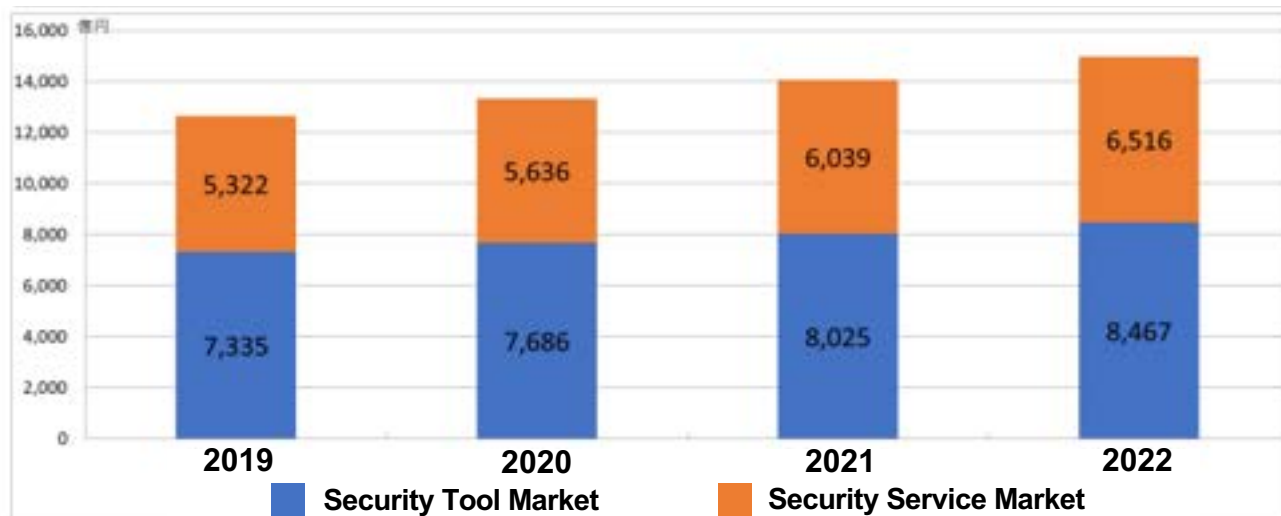
Market Segmentation

情報セキュリティツール Security Tools	Med category	Small category
	Endpoint Protection/Management	AV, EDR, Policy・Setting・Operation Monitoring
	Network Protection & Detection/Perimeter Defense	FW,VPN,IDS/IPS, WAF,UTM,Security Info,Physical Security
	Contents Security	DLP, Encryption, Mail Security, URL Filtering, Vulnerability
	Identity / Access Control	Authentication,Biometric Auth, ID Management, PKI ...etc

情報セキュリティサービス Security Services	Med category	Small category
	Consulting/Diagnosis Service	Consulting, Audit/Evaluation/Diagnosis, Standards certification
	Managed / Operation Service	SOC, Incident response, Forensic, Threats Intelligence
	Other Services	Electronic Certificate, PK Type Auth,Education,Insurance

業態区分 Business Type		
	A Overseas manufacturers	E Major SI
	B Domestic manufacturer	F Consulting firm
	C Trading Company, Distributor (1 st Tier Retailer)	G Security service provider
	D 2 nd /3 rd Tire Retailer with SI/NI Capabilities	H Others (cyber insurance/other industries)

Market Size of Tools and Services



In recent years, demand has increased due to the progress of digital transformation, the increase in cyber attacks, and the spread of telework.

AI and machine learning are being incorporated as advanced and continuous countermeasures, and tools and services have appeared to improve the speed of incident discovery and recovery.

Cloud security market is also expanding.

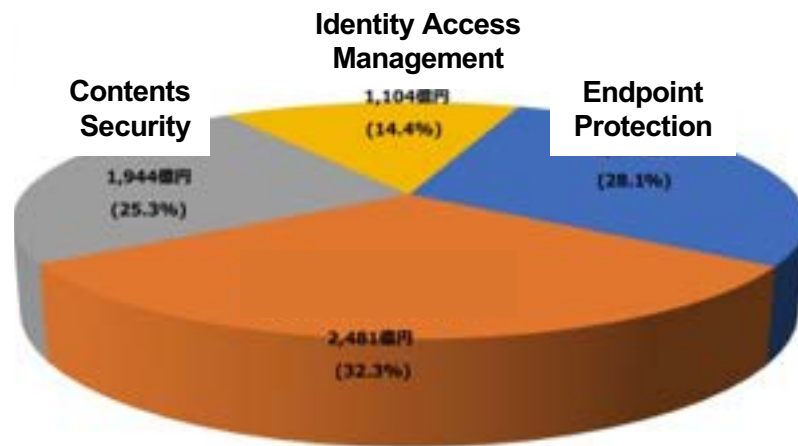
From 2022 onwards, as the tool market expands, the service market is also expected to expand.

Market Trends of Security Tools

FY 2021
¥ 768.6 Billion

↑ 4.8% Increased

FY2020
¥ 733.5 Billion



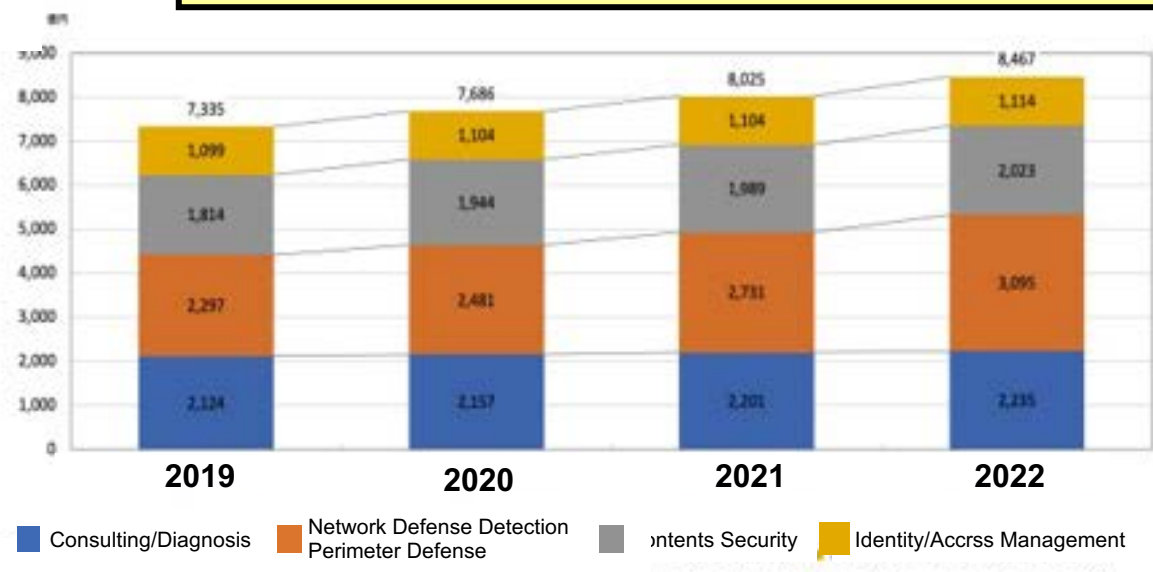
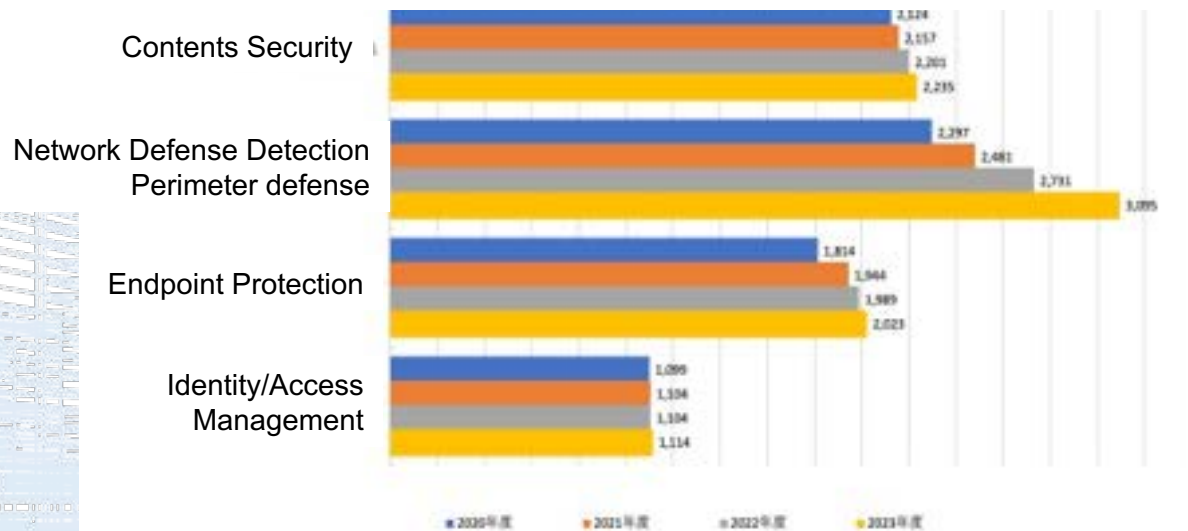
Security Tool Market

Security Service Market

The shift from perimeter defense to zero trust has begun, and the introduction of EDR has progressed.

The expansion of cloud services and telework has created demand not only for zero trust but also for stronger perimeter defense products.

Cloud shift has increased demand for identity management and logon management.

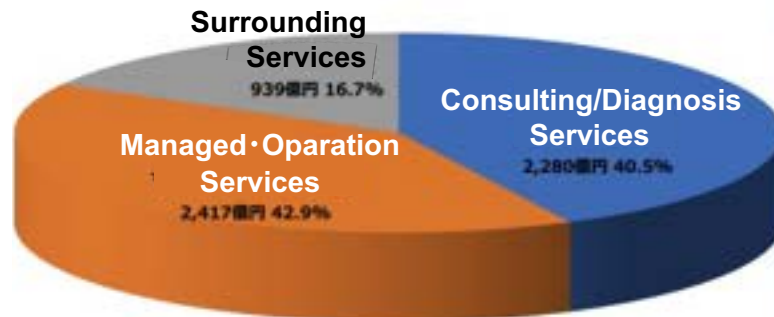


Market Trends of Security Services

FY 2021
¥ 563.6 Billion

↑ 5.9% Increased

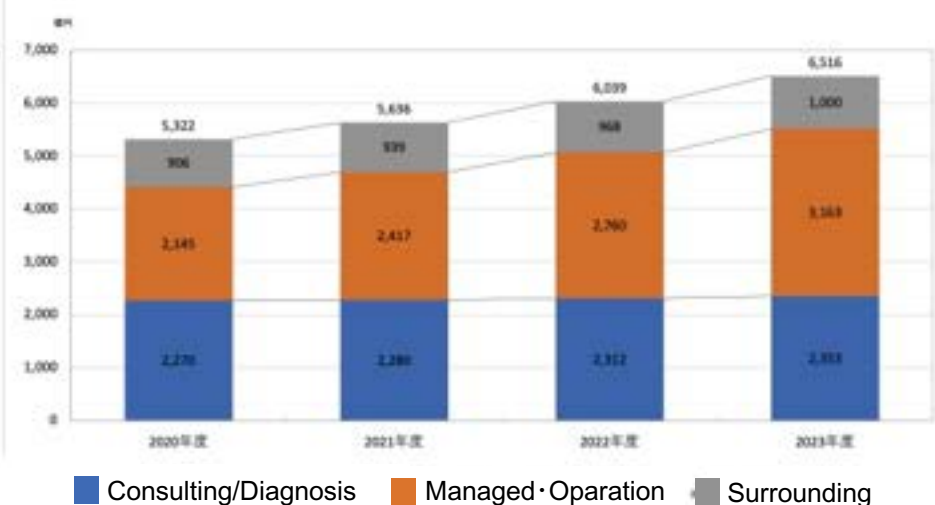
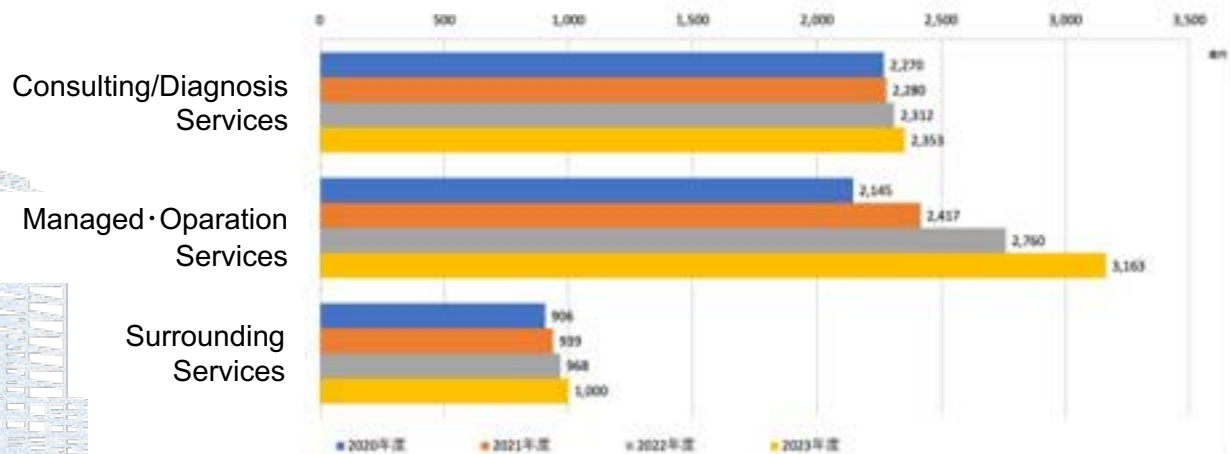
FY2020
¥ 532.2 Billion



Demand for consulting services is increasing.

Incident response and forensics are also seeing high growth rates.

In the education and qualification market, both face-to-face training and training through online meetings are on a growth trend as Covid-19 has subsided.



Services and Tools

1. There is some entry into the service market from overseas, but domestic services are also doing quite well.
2. Many of the tools are made in Europe and America. Recently, it has become common to see Singaporean capital in ventures in places like Israel.

I hope that the ASEAN countries, including Japan, will have more opportunities to mutually advance into each other based on tools.

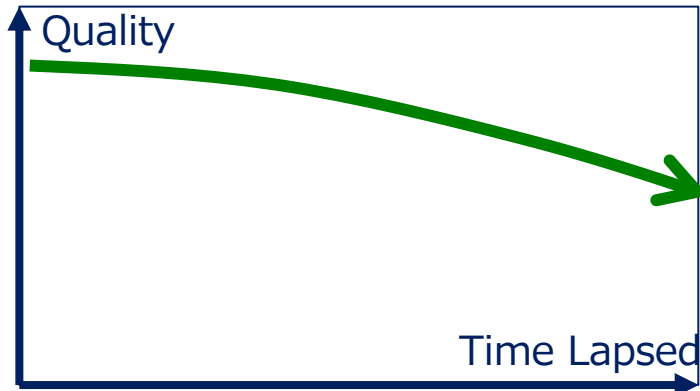
In Addition

What can be seen from the characteristics of security tools (devices)



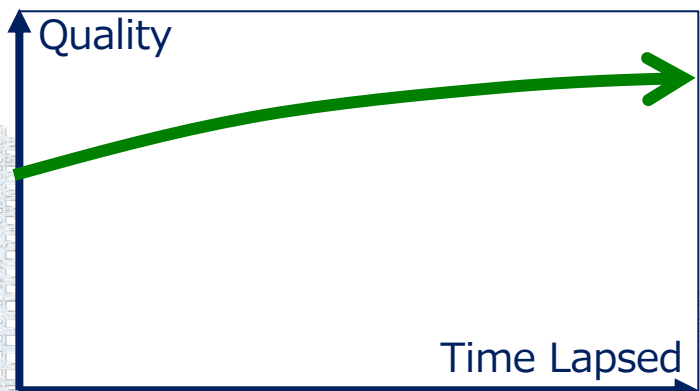
Deterioration of quality over time (personal image)

General Hardware



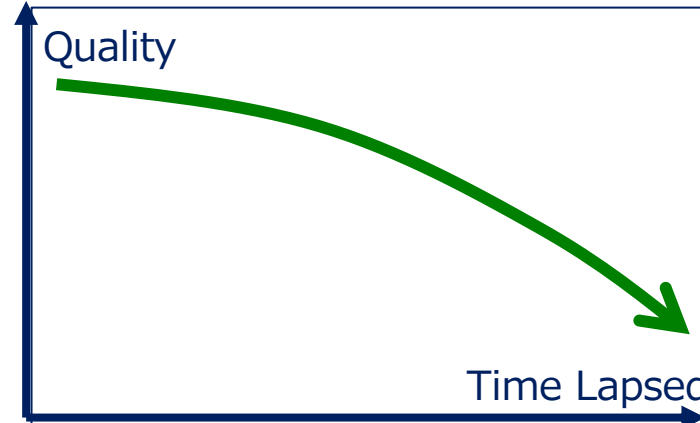
The quality of general hardware deteriorates over time.

General Software



The quality of general software improves with updates.

General Security Software



The quality of general security software tends to deteriorate rapidly as new threats appear frequently.



This is Why new products are coming out one after another.

It will be a huge opportunity for companies entering cyber security market in the future.

Performance degradation due to the emergence of new threats is the fate of security software.

On the other hand, I think there are opportunities to develop new markets with each trend.



Introducing Various Activities For Security Market in Japan





Security Camp

What is Security Camp?

- Business Start : 2004~
- Hosted by : **Security Camp Council**,
IPA(Information-technology Promotion Agency, Japan)
METI (Ministry of Economy, Trade and Industry)

Security Camp Committee is organization that aims to identify and develop young, world-class information security personnel from Japan who will lead the next generation.

We are holding **national conference** annually, **local conference** about 10 times a year, and some additional (very exciting) events.

<https://www.security-camp.or.jp/>

National Conference of Security Camp



National Conference of Security Camp



Point of Security Camp

- **Lecturer is a high-level technician / researcher**
- **Advanced lectures / exercises**
- **Provide programs importance to train of legal knowledge, morals and ethics too.**
- **4 learning event : National convention, Next Camp, Mini Camp and GCC**

GCC (Global Cybersecurity Camp)

GCC started as part of this Security Camp.

1. GCC Seoul - Global Cybersecurity Camp 2018	2019.1.21 – 1.25	4 Countries
2. GCC Tokyo - Global Cybersecurity Camp	2020.2.10 – 2.14	8 Countries
3. GCC 2021 Online - Global Cybersecurity Camp	2021.1.16 – 2.7	8 Countries
4. GCC 2022 Taiwan - Global Cybersecurity Camp	2022.1.8 – 1.23	8 Countries
5. GCC 2023 Singapore - Global Cybersecurity Camp	2023.2.13 – 2.17	8 Countries

- One-week training camp for young people once a year.
- 5-7 person attend from each country in Asia.
- Offering a variety training by high level selected instructors.
- Developing the next generation of global leaders through English communication + security.
- Cross-national friendships fostered here will contribute to the development of the countries involved.



Global Cybersecurity Camp

- Building trust by learning together, thinking together, eating and sleeping together for a week (or a month) during youth period
- Helping to create peace in the future through future business cooperation and exchange of information in case of emergencies.

**Furthermore, we began to establish
ACSC and challenge for ICC.**

Human Resource development through international collaboration (2)

ICC: International Cybersecurity Challenge --- Worldwide CTF Competirion (ENISA)

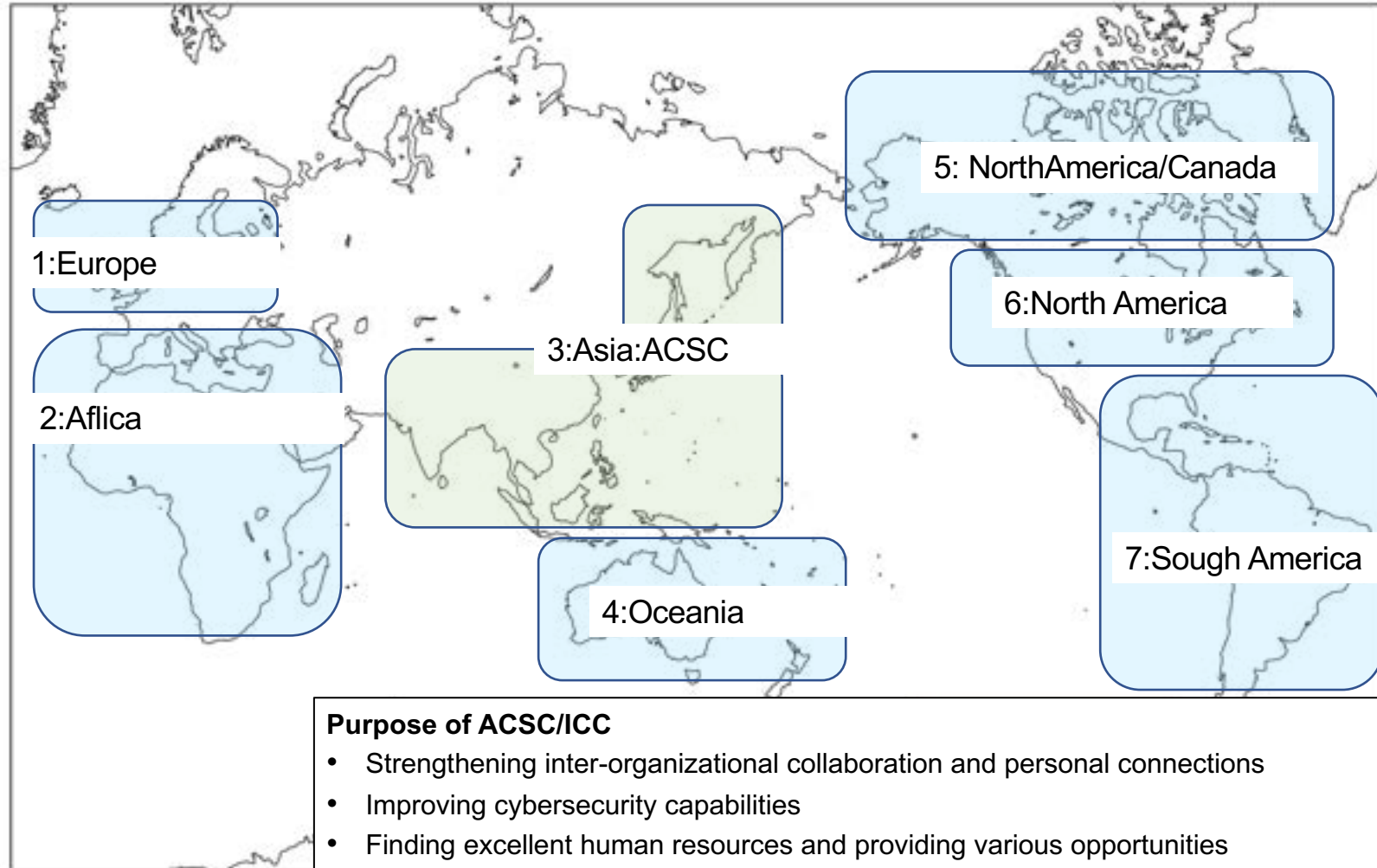
ACSC: Asian Cyber Security Challenge --- ICC Asian Qualifies. 9 Asian countries.

ACSC Qualifies



2023.Feb.25-26@online
<https://acsc.asia/>

- | | |
|--------------|----------------------|
| 1. Japan | 8. India |
| 2. Korea | 9. Mongol |
| 3. Taiwan | 10. Indonesia |
| 4. Singapore | |
| 5. Malaysia | |
| 6. Thailand | |
| 7. Vietnam | |



Purpose of ACSC/ICC

- Strengthening inter-organizational collaboration and personal connections
- Improving cybersecurity capabilities
- Finding excellent human resources and providing various opportunities

ICC Final



2023.Aug@United States
<https://ic3.games/>

CONGRATULATIONS



INTERNATIONAL CYBERSECURITY
CHAMPIONSHIP & CONFERENCE (IC3)

AUGUST 1-3, 2023
SAN DIEGO, CA, USA

FIRST PLACE - TEAM EUROPE



SECOND PLACE - TEAM OCEANIA



THIRD PLACE - TEAM ASIA



Result of ICC

- 1st Team Europe
- 2nd Team Oceania
- 3rd Team Asia (*Team Adia won "Attack & Defense" at Day 2)

2023 IC3 GAMES > WHO WILL COME OUT ON TOP?

I would like to ask for **Your Support**
in the management of ACSC
and in the ICC challenge.

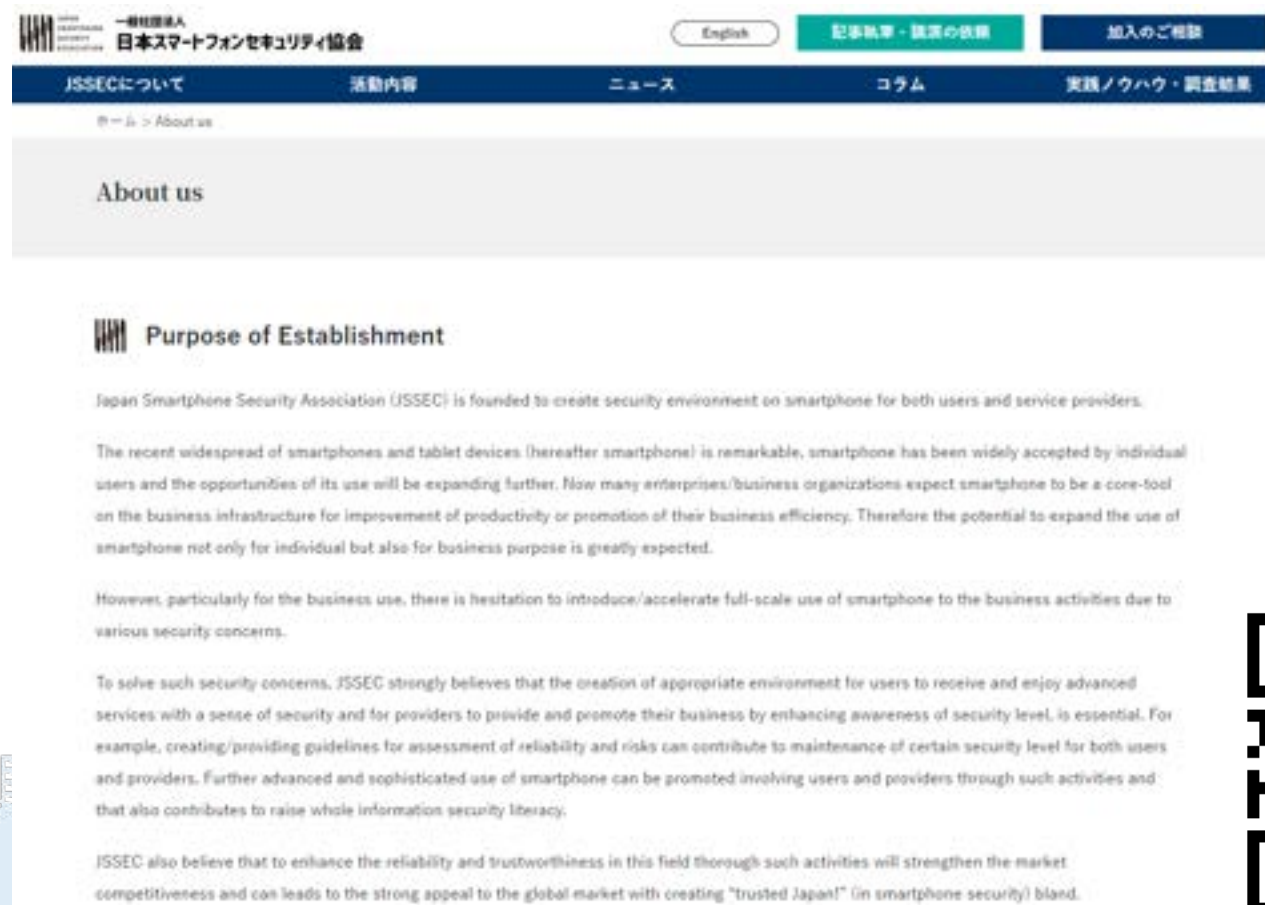
Activities related to Smartphone Security

--- Devices that have become familiar to us ---



JSSEC (Japan Smartphone Security Association)

LAC supported the establishment of JSSEC and serves as the administrative office.

English 記事執筆・執筆の依頼 加入のご相談

JSSECについて 活動内容 ニュース コラム 実践ノウハウ・調査結果

ホーム > About us

About us

目的の設立

Japan Smartphone Security Association (JSSEC) is founded to create security environment on smartphone for both users and service providers.

The recent widespread of smartphones and tablet devices (hereafter smartphone) is remarkable, smartphone has been widely accepted by individual users and the opportunities of its use will be expanding farther. Now many enterprises/business organizations expect smartphone to be a core-tool on the business infrastructure for improvement of productivity or promotion of their business efficiency. Therefore the potential to expand the use of smartphone not only for individual but also for business purpose is greatly expected.

However, particularly for the business use, there is hesitation to introduce/accelerate full-scale use of smartphone to the business activities due to various security concerns.

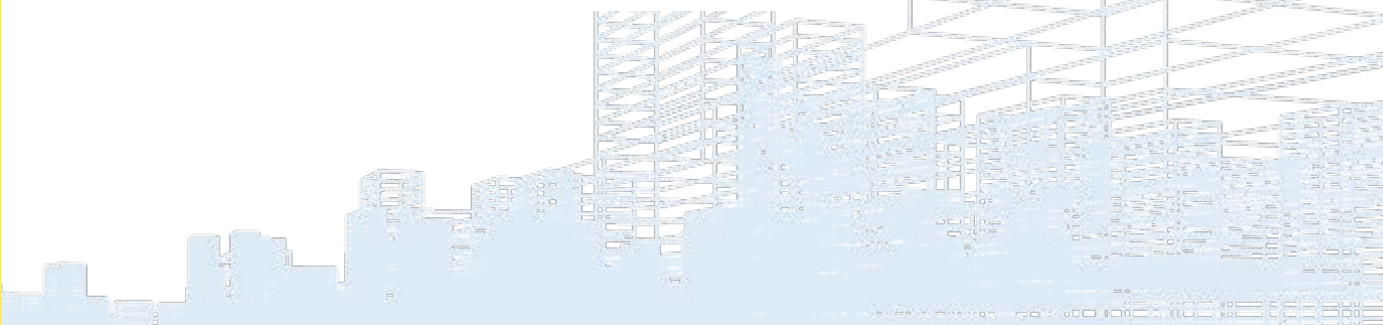
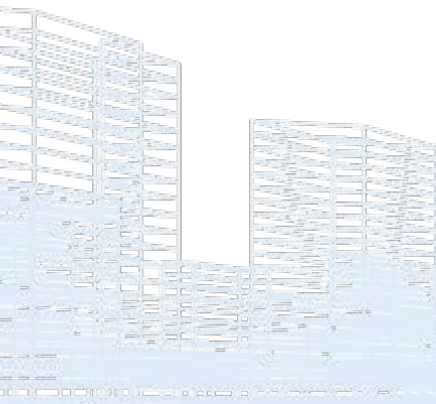
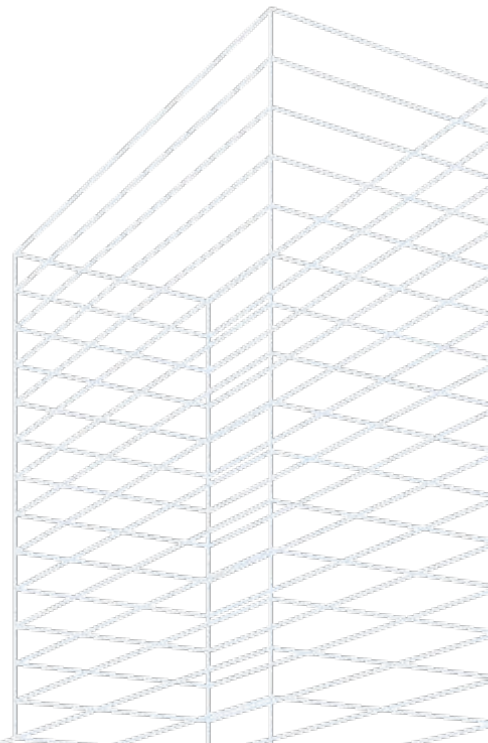
To solve such security concerns, JSSEC strongly believes that the creation of appropriate environment for users to receive and enjoy advanced services with a sense of security and for providers to provide and promote their business by enhancing awareness of security level is essential. For example, creating/providing guidelines for assessment of reliability and risks can contribute to maintenance of certain security level for both users and providers. Further advanced and sophisticated use of smartphone can be promoted involving users and providers through such activities and that also contributes to raise whole information security literacy.

JSSEC also believe that to enhance the reliability and trustworthiness in this field through such activities will strengthen the market competitiveness and can leads to the strong appeal to the global market with creating "trusted Japan!" (in smartphone security) brand.



Android Application Secure Design Secure coding Guidebook

LAC supported to publish Secure Coding Guidebook.



Today I Introduced

JNSA

But there are still many activities for development and growth of the Security Market in Japan.

Let's Grow Together in ASEAN and Japan

G to G

A to A

B to B

O to O

Government

Academic

Business

Organization (Non-Profit base)

Deepen **GABO** to **GABO** communication!!

Thank You





Building A Trusted Society With Reliable Technology

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