

Crisis Management (Business Continuity/Disaster Prevention/Information Security) Solutions Market: Key Research Findings 2017

◆ Research Outline

Yano Research Institute has conducted a study on the domestic crisis management market with the following conditions:

1. Research period: From January to March 2017
2. Research targets: Crisis Management Solution Providers (IT businesses, telecommunication businesses, security software makers, consulting firms, Think-tanks, security companies, etc.)
3. Research methodologies: Face-to-face interviews with expert researchers, surveys via telephone/email, and literature research)

<What are Crisis Management Solutions?>

Crisis management solutions in this research indicate: 1) Business Continuity Solutions (BCP consulting and Disaster Recovery), 2) Disaster Prevention Solutions (Emergency Municipal Radio Communication System, Firefighting Instruction System, Comprehensive Disaster Prevention Information System, Disaster Information Management System, Safety Confirmation/Early Warning Service), and 3) information Security Solutions (Information Security Tools (Products), Information Security Consulting/Diagnosis, Information Security Construction, and Information Security Operation Surveillance/Maintenance).

The details of each service are shown in Table 1.

◆ Key Findings

■ FY2016 Crisis Management Market Projected to Rise by 105.8%, Achieving 896.7 Billion Yen, with More Companies Revising BCPs and Enhancing Countermeasures against Cyberterrorism Attacks

With regard to the business continuity solutions market, 2016 Kumamoto earthquakes have increased the number of enterprises that have revised their BCP created in the past. As for the DR solution market, wider range of companies have introduced the solutions as rising number of cloud service users increased. In regard to the disaster prevention market, both the central and the local governments have continued upgrading the already installed systems and updating higher functions to such systems. A large incident at Japan Pension Service has driven introduction of information security solutions to take countermeasures against cyberterrorism attacks. All of these factors have contributed to raise the domestic crisis management market to attain 896.7 billion yen, 105.8% of the size of the previous year.

■ Crisis Management Market Projected to Achieve 1,063.2 Billion Yen by FY2021

In FY2017 and later, by which the consciousness against crisis fades away, and major companies would be finished taking measures, as well as the unit price of the services declining after the emerge of cloud services, the crisis management market is likely to slow down. On the other hand, with increasing number of companies and local governments placing more

importance on information security solutions due to increase of information leakage stemming from the recent cyberterrorism attacks, reinforcement of the information security solutions is expected to accelerate, preparing for the Tokyo Olympic/Paralympic Games to be taken place in 2020. Therefore, CAGR of the domestic crisis management solution market, based on the sales of the businesses, is likely to be 3.9%, with the market size to achieve 1,063.2 billion yen by FY2021.

◆ **Report Format**

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Language: Japanese

Format: 369 pages in A4 format

Price: 180,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

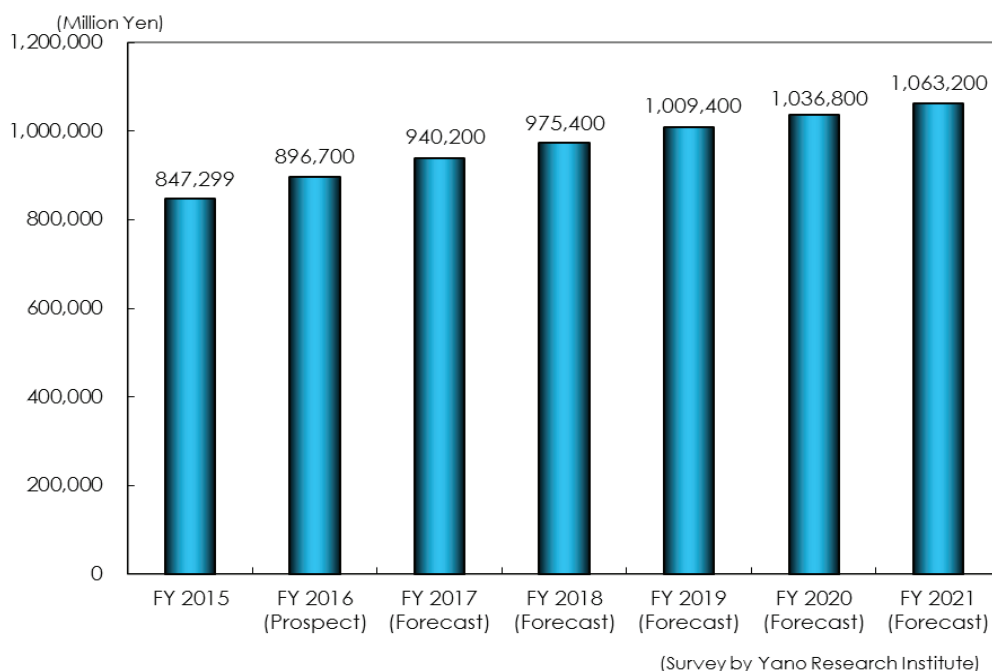
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■ **Figure 1: Transition and Forecast of Crisis Management (Business Continuity/Disaster Prevention/Information Security) Solutions Market Size**



Notes:

1. The market is based on the sales of enterprises
2. Crisis management solutions in this research indicate: 1) Business Continuity Solutions (BCP consulting and Disaster Recovery), 2) Disaster Prevention Solutions (Emergency Municipal Radio Communication System, Firefighting Instruction System, Comprehensive Disaster Prevention Information System, Disaster Information Management System, Safety Confirmation/Early Warning Service), and 3) information Security Solutions (Information Security Tools (Products), Information Security Consulting/Diagnosis, Information Security Construction, and Information Security Operation Surveillance/Maintenance).

■ Table 1: Details of Crisis Management Solutions

Solution Name	Service Name	Details
Business Continuity	BCP Consulting	A service to help create a BCP (Business Continuity Plan) which is the solution to make sure the business continues in case of an emergency including a disaster. It includes some activities to continuously operate the once created plan, providing of a structure to manage, and education and training services are included.
	DR (Disaster Recovery)Solution	A service to recover the information systems from crucial failure stemming from a disaster and other causes, or take preventive measures to prepare for such recovery.
Disaster Prevention	Emergency Municipal Radio Communication System	A radio communication system built for collecting information on disaster or for securing a communication method in case of an emergency.
	Firefighting Instruction System	A system to assist firefighting instructions in case of an emergency.
	Comprehensive Disaster Prevention Information System	A system to support taking countermeasures against disaster in order to minimize the damage by the disaster.
	Disaster Information Management System	A system to support taking countermeasures against disaster according to the damaged areas and contents of the disaster.
	Safety Confirmation/Early Warning Service	A service that can easily confirm safety of the targeted employees, students, office workers, and etc. in case of an emergency.
Information Security	Information Security Tools (Products)	Hardware, or software, or both integrated into a product, which protect viruses from invading, detect and erase viruses invaded, and protect information from leaking outside in case of cyberterrorism.
	Information Security Consulting/Diagnosis	Consulting or diagnosis services regarding information security to countermeasure cyberterrorism.
	Information Security Construction	A service to construct information security to cope with cyberterrorism.
	Information Security Operation Surveillance/Maintenance	Surveillance or maintenance service to monitor operation of information security.

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