

The Transforming Market for Legal and Law-Related Practitioners in Japan

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Abstract

The legal- and law-related-services market is undergoing significant transformation: it is being expanded and becoming highly competitive, affected by the cultural and economic diversification of the current world society. In Japan, another aspect must be considered in order to clearly understand this transformation. In addition to fully qualified legal professionals, or *bengoshi*, there are many different certified law-related practitioners such as *shihō shoshi* (judicial scriveners), *gyōsei shoshi* (administrative scriveners), *zeirishi* (certified public tax attorneys), *benrishi* (patent attorneys), *sharōshi* (labour and social-security attorneys), and others who are also important actors in the legal- and law-related-services market. These certified law-related practitioners take on important roles not only in services related to civil and administrative law, but also in corporate legal matters in the specialized fields of the business activities of small and medium-sized enterprises (SMEs) in Japan. Traditionally, *bengoshi* and other certified law-related practitioners have shared the legal-services market symbiotically, without competition. However, the situation has gradually changed since around the 1990s. In this paper, the factors of the transformation of the Japanese legal- and law-related-services market are discussed based on empirical data, and the direction of the transformation in this market is indicated.

Keywords: legal profession, law-related practitioners, symbiotic relation, competition, corporate consulting, dispute resolution

1. INTRODUCTION

One of the main research fields of the Japanese Association of Sociology of Law (JASL) is the legal profession. Even in the *Journal of Sociology of Law*,¹ this subject has repeatedly been a special topic of annual meetings. In 2011, I held a special session of the annual meeting of the JASL and edited a volume of the journal entitled *New Fields of Legal Profession and Sociology of Law*.²

In Japan, in addition to fully qualified legal professionals, or *bengoshi* (attorneys at law),³ there are many different certified law-related practitioners (quasi-lawyers) such as *shihō*

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1. The *Journal of Sociology of Law (Hō-Shakaigaku)* is the academic journal of the JASL.
2. JASL (2012).
3. *Bengoshi Act*, Act No. 205, 1949.

shoshi (judicial scriveners),⁴ *gyōsei shoshi* (administrative scriveners),⁵ *zeirishi* (certified public tax attorneys),⁶ *benrishi* (patent attorneys),⁷ and *shakai hoken rōmushi* (labour and social-security attorneys (abbreviated as *sharōshi*)),⁸ among others. Various law-related practitioners have arisen to meet the practical need for the support of civil and administrative applications to authorities. Currently, these certified law-related practitioners play important roles, providing practical support not only in matters of civil and administrative law, but also in matters of corporate compliance in the specialized law-related fields of business, especially for small and medium-sized enterprises (SMEs) in Japan.

So far, the legal- and law-related-service market has been shared by *bengoshi* and various certified law-related practitioners in specialized fields. *Bengoshi* are regarded as court advocates and representatives in dispute cases, but other law-related practitioners are also regarded as important actors in the practice of civil, administrative, and corporate law. It is worth noting that, while the number of *bengoshi* is now almost 40,000, the total number of legal and law-related practitioners, including *shihō shoshi*, *gyōsei shoshi*, *zeirishi*, *benrishi*, and *sharōshi*, amounts to more than 200,000.

Until about three decades ago, *bengoshi* and other certified law-related practitioners enjoyed a symbiotic relationship, with relatively low competition in the legal- and law-related-services market. However, it seems that this symbiotic relationship began to break up, mainly because of the increasing numbers of *bengoshi* and other certified law-related practitioners, and because of the development of Information and Communications Technology (ICT) and Artificial Intelligence (AI), which deplete the supply of routine legal and law-related work. This paper introduces the current condition of competition in the legal- and law-related-services market in Japan and shows the possible direction of competition in the future.

2. BACKGROUND OF THE TRANSFORMATION

2.1 Conditional Change before the Justice-System Reform in Japan

Until the late 1980s, the legal- and law-related-services market in Japan was relatively stable, because the population of *bengoshi* and other certified law-related practitioners was relatively small. At that time, the need for legal and law-related services was divided clearly based on the specialized fields of practitioners. *Bengoshi* and other certified law-related practitioners shared the market for legal and law-related services symbiotically, without competition. However, that began to gradually change in the 1990s.

One of the most significant background factors in the change was Japan's entrance into the dynamic global trade market. Especially since the Plaza Accord in 1985,⁹ Japan's relatively stable domestic industrial market was driven to change by global commercial bodies, investors, nonprofit pressure groups, and non-governmental organizations, which were

4. *Shihō Shoshi Act*, Act No. 197, 1950.

5. *Gyōsei Shoshi Act*, Act No. 4, 1951.

6. *Zeirishi Act*, Act No. 237, 1951.

7. *Benrishi Act*, Act No. 49, 1921, replaced by the new *Benrishi Act*, Act No. 49, 2000.

8. *Sharōshi Act*, Act No. 89, 1968.

9. Frankel (2015).

highly demanding and insistent. Since then, Japanese corporations have become more cautious towards the downside risks of business activities such as a lack of social responsibility, a decrease in product quality, and corporate misconduct, which all damage corporate brand values. Corporations that sustain damage to their public reputations by such problems are generally forced out of the global market and go bankrupt. Critical views on business activities from the global stakeholders mentioned above are highly stringent against corporate misconduct. Thus, Japanese corporations have become more oriented toward risk prevention. Affected by this conditional change, the legal- and law-related-services market has become larger and more diversified.

2.2 Justice-System Reform in Japan and Its Results

The Justice System Reform Council (JSRC), which discussed comprehensive reform of the justice system in Japan, was established under the Cabinet of Japan on 27 July 1999. The JSRC discussed the measurements of enhancement of the use of the civil justice system, expansion of access to justice, promotion of alternative dispute resolution, popular participation in criminal justice, and the expansion of the legal profession, among other issues. On 12 June 2001, the JSRC released its recommendations: (1) the legal population should be substantially increased; (2) training for potential lawyers should be comprehensively reformed; (3) lawyers should be encouraged to focus on social responsibility (public-interest lawyering) and specializations such as business law and international transactions; and (4) the status of people engaged in corporate legal affairs, who have not been admitted to practise, should be reviewed.¹⁰ Based on the recommendations, the new Law School System (*Hōka-Daigakuin*) was introduced in 2004, and the traditional judicial examination was replaced by a new examination. Following this reform, the number of successful judicial examinations has risen to about 1,500–2,000 every year, and the total number of lawyers has increased rapidly.

2.2.1 The Increasing Numbers of *Bengoshi*

The rapid increase in the number of *bengoshi* is shown in Figure 1. The total number of *bengoshi* has been increasing gradually since the 1960s, but the rate jumped drastically beginning around 2000. As of 1 September 2018, there were 39,983 lawyers in Japan.¹¹

This increase has pressured *bengoshi* to diversify and expand their field of practice. Traditionally, *bengoshi* were regarded as professionals who only dealt with court-related practices like court representation, filing civil lawsuits, criminal defence, and supporting negotiation, conciliation, and settlement. Recently, however, *bengoshi* practices have become increasingly business-oriented, as the rate of corporate practice has been increasing. Even though the main part of *bengoshi*'s frequent legal work is still court-related practices, corporate-related work has also become an important part of their practices.¹²

The number of in-house *bengoshi* is also increasing to meet the expanding need for legal professionals internal to corporations. In 2002, there were only 80 in-house *bengoshi* in

10. The Justice System Reform Council (2001), Chapter III.

11. Nichibenren (2018).

12. Fukui & Fukui (2010), pp. 285–6.

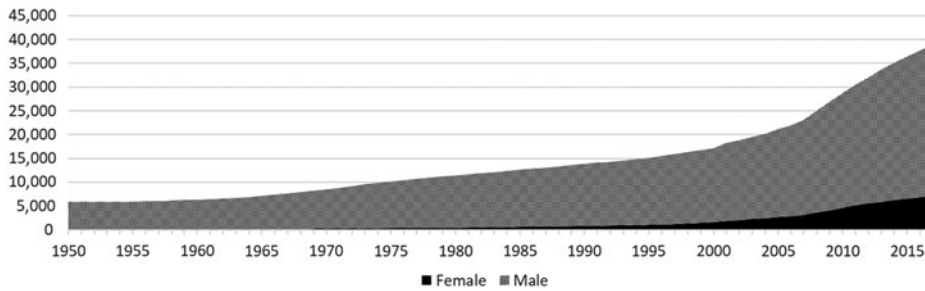


Figure 1. The number of *bengoshi* (attorneys) in Japan. Source: Japan Federation of Bar Associations (2017).

Japan; by 2017, there were more than 1,900.¹³ In-house *bengoshi* deal with various corporate legal matters, from drafting contracts, conducting legal research, performing legal management, and organizing negotiations to outreach to outside *bengoshi* offices. The main focus of in-house *bengoshi* is preventive legal management, but they also play an important role in proactive corporate strategy. They are regarded as attractors of the transformation of the image of the legal professional in corporations.¹⁴

As described, *bengoshi*'s field of practice has greatly diversified over the recent decades (Figure 2).

2.2.2 The Slump in Court Practice

Despite the diversification of *bengoshi*'s practice in the legal market, the expansion of the number of *bengoshi* has not been the primary cause of increases in the amount of their court work. Figure 3 depicts a ten-year comparison of the number of *bengoshi* and transition trends in the number of newly filed cases at local courts.

Since 2010, the number of newly filed cases in the district courts in Japan has decreased, even though the population of *bengoshi* has been increasing. One reason for the decreasing number of cases filed in district courts is the reduction in cases concerning claims for overpayment of credit-loan interest, which was decided in 2006 by the Supreme Court to be unlawful.¹⁵ That being said, there seem to be more complicated factors behind this decrease.¹⁶

Faced with a decreasing number of court cases, *bengoshi* have been transforming their practice, supplementing or even replacing their court-oriented work with more work from the business sector.

13. Japan In-House Lawyers Association (2018).

14. Fukui & Fukui, *supra* note 12, pp. 286–9.

15. Judgement of the Supreme Court on 13 January 2006, Case No. 2004 (Ju) 1518, *Minshū* Vol. 60, No. 1, http://www.courts.go.jp/app/hanrei_en/detail?id=803 (accessed 17 January 2020).

16. Japan Federation of Bar Associations (2017), p. 96.

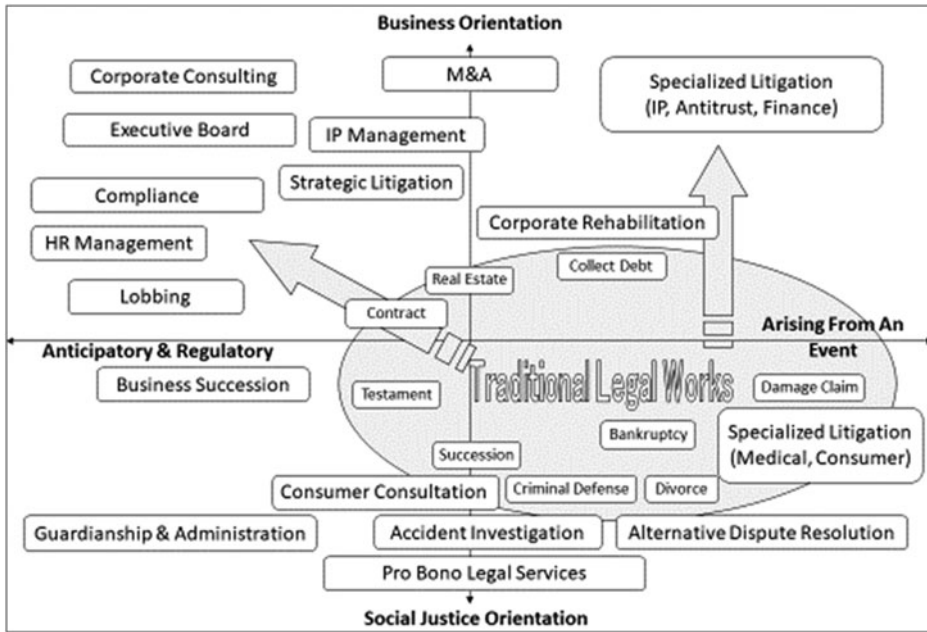


Figure 2. Recent diversification among *bengoshi* in Japan. Source: Fukui & Fukui (2010).

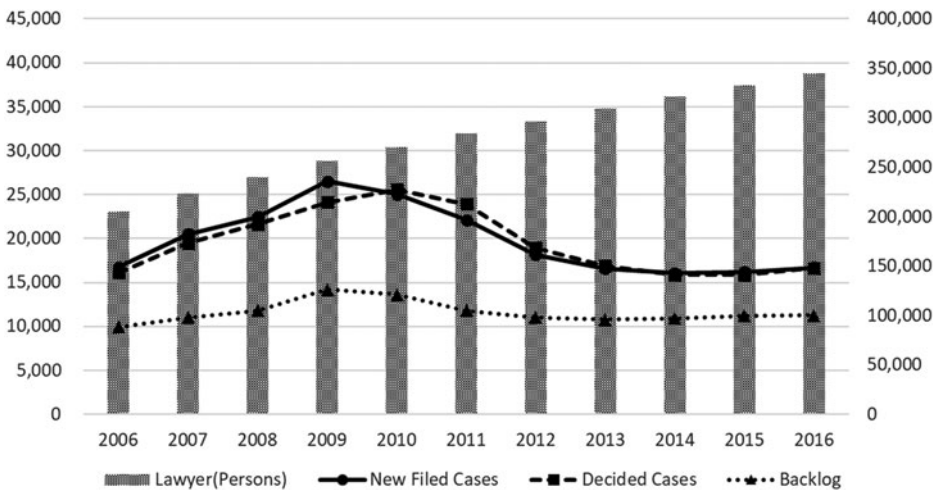


Figure 3. The number of filed cases of the district court (first instance) and the number of *bengoshi*, 2006–16. Source: Japan Federation of Bar Associations (2017).

3. DEVELOPMENT OF CERTIFIED LAW-RELATED PRACTITIONERS IN JAPAN

3.1 Current Conditions of Practice for Certified Law-Related Practitioners

Like the *bengoshi*, certified law-related practitioners are also growing in number, and they have an interest in the *bengoshi*'s service market. As discussed above, the legal- and law-

related-services market was formerly symbiotically shared by the *bengoshi* and other certified law-related practitioners. *Shihō shoshi* dealt with real-estate and commercial registration, judicial documentation, and the procurement of submissions to the judicial authorities.¹⁷ *Gyōsei shoshi* dealt with administrative documentation and the procurement of submissions to the administrative authorities.¹⁸ *Zeirishi* dealt with documentation for tax-return filing and the procurement of petition for tax complaints.¹⁹ *Benrishi* dealt with applications for patents and the procurement of petitions for patent complaints.²⁰ *Sharōshi* dealt with labour and social-security insurance documentation.²¹ Still, there are some other law-related practitioners in Japan.²² Their respective roles in the legal- and law-related-services market was not harmonized until the late 1980s.

The population of certified law-related practitioners has been increasing. For example, the number of *shihō shoshi* in 2000 was about 17,000 but, as of April 2018, it had risen to 22,488.²³ As of 2017, the number of *gyōsei shoshi* stood at 46,205, of *zeirishi* at 76,493, of *benrishi* at 11,057, and of *sharōshi* at 40,535.²⁴ In 2018, their total population was over 200,000 and still increasing (see Figure 4).

Another aspect of the transforming conditions of the market for law-related practitioners' services is the development of ICT and AI. Recently, the Japanese government has been enhancing the comprehensive introduction of ICT for the administrative application of registrations and petitions, which directly relate to the exclusive practical field of *gyōsei shoshi*.²⁵ This has made it much more convenient for applicants to deal with administrative applications by themselves. Tax-return filing, which is an exclusive practical field of *zeirishi*, is also gradually being replaced by online filing,²⁶ because it is convenient for individuals and corporations to enter their revenue directly to report to the tax office. Real-estate and commercial registration, which is an exclusive field of practice of *shihō shoshi*, is also gradually being replaced by online registration,²⁷ though it is still mainly done at the Regional Legal Affairs Bureau. Patent filing, which is an exclusive field of practice of *benrishi*, has mostly been replaced by online filing.²⁸ Additionally, social-insurance filing, which

17. Art. 3 of the *Shihō Shoshi Act*.

18. Arts 1–2 and 1–3 of the *Gyōsei Shoshi Act*.

19. Art. 2 of the *Zeirishi Act*.

20. Arts 4, 5, and 6 of the *Benrishi Act*.

21. Art. 2 of the *Sharōshi Act*.

22. *Kōnin kaikeishi* (certified public accountants) deal with some law-related practices (e.g. authorizing accounting records) in corporations, but their main practices are not regarded as legal. *Tochikaoku chōsashi* deal with authorizing real-estate surveys, a kind of law-related practice, but their main focus is on technical surveys of real estate. In this paper, these two professionals are excluded from the law-related practitioners.

23. See *Shihō shoshi Profile*, http://www.shiho-shoshi.or.jp/associationinfo/rengokai_data.html (accessed 17 January 2020).

24. Japan Federation of Bar Associations, *supra* note 16, p.53.

25. The website of e-Gov is available at <http://www.e-gov.go.jp/> (accessed 17 January 2020). This website is the comprehensive platform for online applications, registrations, and petitions to the Japanese government.

26. The National Tax Agency Japan's website is available at <http://www.nta.go.jp/english/index.htm> (accessed 17 January 2020). It includes the online support system for income-tax filing and its application sites.

27. The online real-estate-registration system is available at http://www.touki-kyoutaku-online.moj.go.jp/whats/what_top.html (accessed 17 January 2020).

28. The Japan Patent Office is available online at <https://www.jpo.go.jp/tetuzuki/pcinfo/index.html> (accessed 17 January 2020).

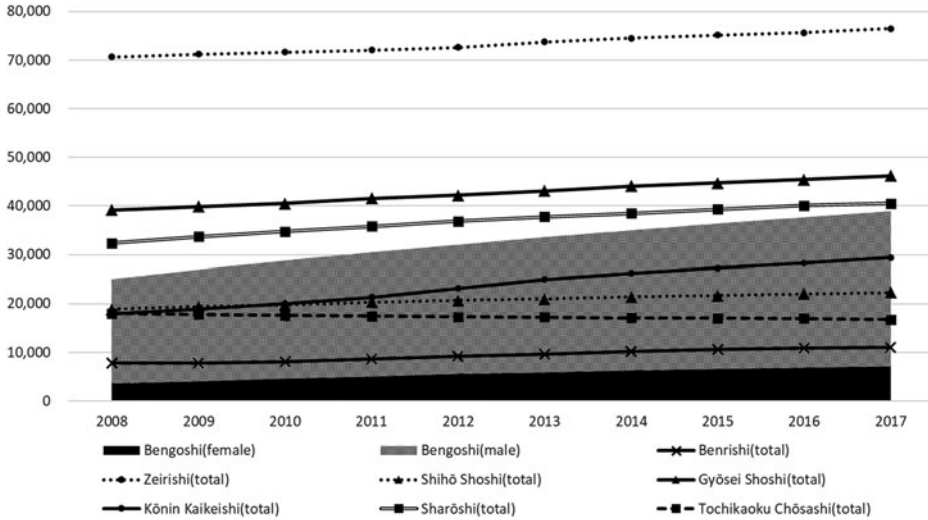


Figure 4. The transition of the population of law-related practitioners. Source: Japan Federation of Bar Associations (2017).

is an exclusive field of practice of *sharōshi*, has been materially replaced by online filing administered by the Japan Pension Service.²⁹

In addition to ICT technology, the development of AI has also led to great changes in the respective fields of practice of certified law-related practitioners. The documentation work dealt with by such law-related practitioners is expected to be replaced by AI documentation assistant systems installed in personal computers and/or connections to the Internet.³⁰ Tax preparation and social-insurance applications, regarded as among the most “computerizable” tasks, have traditionally been the exclusive fields of practice of *zeirishi* and *sharōshi*, respectively. Legal and administrative documentation, traditionally handled by *shihō shoshi* and *gyōsei shoshi*, respectively, are also regarded as “computerizable.” Patent research work, the essential base of patent filing, can be dealt with by AI systems connected to the Internet. As shown above, the current daily work of certified law-related practitioners is threatened by the development of computer- and Internet-based AI systems. Under the pressure of both the increasing professional population and developments in ICT and AI, law-related practitioners are increasingly cultivating new practices beyond their traditional practical fields.

3.2 Developing Fields of Certified Law-Related Practitioners

As discussed above, under the pressure of the increasing professional population and ICT and AI development, certified law-related practitioners are opening up new fields of practice. One of the pioneering examples is that, since 2002, *shihō shoshi* have been authorized

29. The Japan Pension Service is available online at <http://www.nenkin.go.jp/denshibenri/setsume/20120718-06.html> (accessed 17 January 2020).

30. Frey & Osborne (2013).

to act with the power of representation at summary courts.³¹ *Shihō shoshi* can now represent parties at the summary court, in cases under the limit of JPY 1,400,000 (ca. USD 12,000), provided they have received the additional qualification from the Ministry of Justice. Since this amendment, which is limited to civil cases at the summary court, *shihō shoshi* have gained the same authorization powers as *bengoshi*.

Another example of a new field of certified law-related practitioners is alternative dispute resolution (ADR). In discussions by the JSRC in the early 2000s, empowerment of ADR was one of the most important issues. The JSRC recommended that efforts to reinforce and vitalize ADR should be made to ensure that people would consider ADR to be an equally attractive option to adjudication.³² In response, the certification of ADR-service providers was introduced in 2007 in the form of the Act on Promotion of Use of Alternative Dispute Resolution.³³ Following this reform, most certified law-related practitioners started to establish their own specialized ADR-service providers, certified by the Ministry of Justice of Japan.³⁴ Though its authorization is limited to the specialized fields of practice, from the point of view of certified law-related practitioners' daily practices, permission to represent clients in dispute resolutions looks attractive.³⁵ More than 150 ADR-service providers have been established since 2007.

Corporate consulting is also a remarkable example of a new field for certified law-related practitioners. As mentioned above, since the latter half of the 1980s, Japanese corporate society has become strongly influenced by global stakeholders, who are stringent against corporate misconduct. Japanese corporations have become increasingly protective against downside risks, which can seriously damage their brand value. Affected by this conditional change, certified law-related practitioners are entering the market of corporate consulting in matters relating to their certified field of law. They can give advice relating to their own certified practices, as needed for preventive management of a corporation, and they are gaining respect in such fields.

3.3 Example of the Competition between *Bengoshi* and *Sharōshi*

Under such conditions, competition between *bengoshi* and other certified law-related practitioners has become more intense. One example is that between *bengoshi* and *sharōshi*. *Sharōshi*'s main field of practice has traditionally been limited to labour and social-security documentation and the procurement of filings. However, affected by the new needs of sophisticated labour management, *sharōshi* now get more chances to give advice to SMEs on employment regulations, industrial injury insurance, industrial health and safety management,

31. Art. 3(6) of the *Shihō Shoshi Act*, Amendment to the *Shihō Shoshi Act* (Act No. 33 of 2002).

32. The Justice System Reform Council, *supra* note 10, II-1-8 (1).

33. The Act on Promotion of Use of Alternative Dispute Resolution (*Saiban-Gai Funsou Kaiketsu Tetsuduki no Riyō no Sokushin ni Kansuru Houritsu*, Act No. 151 of 2004).

34. *Kaiketsu Support* (information website of the certified ADR-service providers), <http://www.moj.go.jp/KANBOU/ADR/> (accessed 17 January 2020).

35. A summary of discussions at the JSRC on the permission of representation of certified law-related professionals (in Japanese), <http://www.kantei.go.jp/jp/singi/sihou/kentoukai/adr/dai38/38siryou1.pdf> (accessed 17 January 2020).

and similar issues. This change widens *sharōshi*'s practical field greatly, and they are now regarded as a kind of labour law and social-security-management consultants.³⁶

Additionally, *sharōshi* have been authorized to represent parties at the individual labour dispute-resolution system at the Prefectural Labour Bureaus (since 2003), at the Labour Relation Commission (since 2007), and at their certified ADR-service provider (since 2007).³⁷ Also, in 2015, *sharōshi* gained authorization to be assistant representatives at the court in labour and social-security disputes (for all these, additional certification is required).³⁸ *Sharōshi*'s practices have become similar to *bengoshi*'s practices in the areas of labour and social-security law, which has led to *sharōshi* becoming important in the area of corporate compliance in the field of labour and social-security law.³⁹

Compared to other certified law-related practitioners, like *sharōshi*, it is difficult for *bengoshi* to get consultant positions at SMEs because SME business owners regard *bengoshi* only as court advocates, and they have very little such corresponding work. They also think that *bengoshi*'s fees are too expensive in proportion to the work provided.⁴⁰ For some important law-related practices, like making employment regulations for corporations, a task in which *sharōshi* and *bengoshi* both are competent, most SME business owners prefer to deal with *sharōshi*. So, *sharōshi* and *bengoshi* get into competition. Another new law-related field of practice in which *sharōshi* are more dominant than *bengoshi* is mental health labour-conditions management.⁴¹

As shown above, in some important corporate-law-related practical fields, *bengoshi* and *sharōshi* are in competition, and *sharōshi* dominate in some fields.

3.4 Other Anecdotal Evidence of the Competition between Bengoshi and Certified Law-Related Practitioners

There is more anecdotal evidence. One such example is the registration practice at the registry office. The registration practice was generally regarded as *shihō shoshi*'s exclusive field of practice⁴²; *bengoshi* and *shihō shoshi* had been in conflict on the registration practice because *bengoshi* sometimes conduct real-estate and/or commercial registration at the registry office on behalf of their clients. Since the case of *Bengoshi v. Saitama Shihō Shoshi Association* on the matter of *bengoshi*'s Authorization of Registration Practice,⁴³ the registration practice has been officially recognized as being included in *bengoshi*'s competent practices. According to the decision, Article 3(1) of the *Bengoshi Act*, which defines *bengoshi*'s duties in general, their duties cover all legal practices, and these are not excluded by any other acts, like the *Shihō Shoshi Act*. Even though *bengoshi* are guaranteed the right to practise registration at the registry office, they are still not always given priority in this field

36. This is permitted by Art. 2(1)(iii) of the *Sharōshi Act* (Act No. 89, 1968).

37. Art. 2(1)(i)-4, 5, 6 of the *Sharōshi Act*, an Amendment to the *Sharōshi Act* (Act No. 116, 2002 and No. 62, 2005).

38. Art. 2-2 of the *Sharōshi Act*, an Amendment to the *Sharōshi Act* (Act No. 116, 2014).

39. Fukui (2017).

40. Fukui & Fukui, *supra* note 12, p. 280.

41. *Ibid.*, p. 281.

42. Art. 3(1)(i) of the *Shihō Shoshi Act*.

43. Tokyo High Court Decision, 29 November 1995 (1994 [Ne] 2755). See Ishikawa (1995), pp. 9-26.

of practice. Most people still regard registration at the registry office as *shihō shoshi*'s exclusive practice, and they usually commission *shihō shoshi* to register their real estate and/or to establish a corporation.

Another piece of evidence is the giving of consultation on amicable divorces. Article 763 of the Japanese Civil Code allows a husband and wife to divorce by agreement, in an amicable manner.⁴⁴ Thus, some *gyōsei shoshi* give advice for profit to a husband and wife, who want to divorce by such an agreement, about achieving a smooth and low-cost divorce with no trouble, because *gyōsei shoshi* believe that Article 72(1) of the *Bengoshi Act*, which prohibits the provision of legal services by non-*bengoshi*, exceptionally permits *gyōsei shoshi* to do so, since making a notification of divorce to the municipal office on behalf of their clients is included in *gyōsei shoshi*'s certified scope of practice.⁴⁵ The Japan Federation of Bar Associations (JFBA) regards this as illegal but, so far, there has been no decisive precedent on this issue by the court,⁴⁶ meaning that it is still in the grey zone of what is legally permitted. However, even though *bengoshi* are obviously competent to deal with divorce matters, they seem unable to dominate in this service market.

3.5 Tentative Result of the Discussion

So far, there have not been much detailed empirical data on the competition between *bengoshi* and other certified law-related practitioners. But, as confirmed above, the developing fields of certified law-related practitioners are overlapping with the *bengoshi*'s areas of practice. Inevitably, in some fields of practice, the competition between *bengoshi* and other certified law-related practitioners has been observed. However, as the population of *bengoshi* and other certified law-related practitioners is increasing, and ICT and AI developments are rapidly progressing, full-scale competition between them seems unavoidable in the near future.

The most competitive areas of practice are presumed to be legal consulting, corporate compliance, and dispute resolution. Most of the certified law-related practitioners have entered into these service markets and began to compete with *bengoshi*. Even now, *bengoshi* do not always dominate the competition in these fields, and the competition map of these fields could change greatly in the near future.

There is only indirect evidence that the annual income (average and median value) of *bengoshi* is decreasing (Table 1). This decrease seems to correlate with their competition

44. Art. 763 of the Japanese Civil Code (Act No. 89 of 1896) simply provides that a husband and wife may divorce by agreement. A husband and wife can divorce by making an agreement and submit the notification of divorce to the municipal office.

45. Art. 72 of the *Bengoshi Act* provides as follows: "No person other than an attorney or a Legal Professional Corporation may, for the purpose of obtaining compensation, engage in the business of providing legal advice or representation, handling arbitration matters, aiding in conciliation, or providing other legal services in connection with any lawsuits, non-contentious cases, or objections, requesting for re-examination, appeals and other petitions against administrative agencies, etc., or other general legal services, or acting as an intermediary in such matters; provided, however, that the foregoing shall not apply if otherwise specified in this Act or other laws." JFBA claims that this article prohibits all non-*bengoshi*'s legal practices in general, if it is not permitted by the *Bengoshi Act* and other laws. But certified law-related practitioners tend to believe that, if the matter brought by their client includes no explicit dispute and is relating to their certified field of law, they can give advice on this matter.

46. For the JFBA's current stance on the prohibition of the provision of legal services by non-*bengoshi*, please see the JFBA website available at <https://www.nichibenren.or.jp/activity/improvement/gyosai.html> (in Japanese) (accessed 17 January 2020).

Table 1. The average and median revenue and income of *bengoshi*, 2006–14

Average of revenue and income				
	2006	2008	2010	2014
Revenue	JPY36.20 mil	JPY33.89 mil	JPY33.04 mil	JPY24.02 mil
Answerers	4,025	4,021	1,354	3,199
Income	JPY17.48 mil	JPY16.67 mil	JPY14.71 mil	JPY9.07 mil
Answerers	3,978	3,977	1,280	3,128
	Median of revenue and income			
	2006	2008	2010	2014
Revenue	JPY24.00 mil	JPY22.00 mil	JPY21.12 mil	JPY14.30 mil
Answerers	4,025	4,021	1,354	3,199
Income	JPY12.00 mil	JPY11.00 mil	JPY9.59 mil	JPY6.00 mil
Answerers	3,978	3,977	1,280	3,128

Source: Japan Federation of Bar Associations (2015).

in the service market, even though it can be thought of both as a cause and as a result of their competition.

4. CONCLUSION

Bengoshi and certified law-related practitioners still seem to enjoy a relationship that is mostly symbiotic, sharing the legal- and law-related-services market, but competition among them is increasing, and full-scale competition will be unavoidable in the near future. The number of *bengoshi* and other certified law-related practitioners is still increasing, and the development of ICT and AI will not stop; both place heavy pressures on the legal- and law-related-services market, fuelling the above-discussed transformation. The main overlapping practical fields, such as legal consulting, corporate compliance, and dispute resolution, are becoming battlegrounds.

From the point of view of the desirable future of the legal and law-related practices, quality competition is welcome, but price competition might cause harmful side effects on the quality of the practices, overall. In the current situation, quality control of legal and law-related practice is essential.

Discussion in this paper still remains provisional analysis, as it is based on past surveys and somewhat dated official statistics. It is necessary to conduct a new survey that properly focuses on this issue to enable a more detailed empirical exploration.

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