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クラウド・ミュトスとシーシュポスの神話 終わらないAI 防衛投資

最近、金融界では、どこにいてもアンソロピック (Anthropic) のクラウド・ミュトス (Claude Mythos) の話題ばかりだ。

ミュトスが示したのは、AI がもはや単なる知識労働の補助ツールに留まらず、サイバー空間における脆弱性の発見や攻撃可能性の探索に深く踏み込み始めたという現実である。もし、AI が未知の脆弱性を高速で発見するのなら、国防のみならず政府・企業、とりわけ金融機関や重要インフラを担う部門は、防御として高度な AI を導入せざるを得ない。エコノミストとしては、既に過熱傾向にあった AI 投資をさらに積み上げるための新しいロジックが生まれたのではないかと、危惧している。

Mythos とは、ギリシャ語に由来する「神話」を意味する言葉だ。アンソロピックがその名を与えた AI モデルは、サイバー防衛のための新しい能力を示すものだが、それは同時に、AI 時代の「新しい神話」の名称となるだろう。これまで AI 投資は、「生産性革命」、「人手不足の解消」、「科学的発見の加速」といった明るい神話によって正当化されていた。だが、ミュトス以降は、そこにもう一つの強力な神話加わる。「AI でなければ、AI による攻撃を防げない」というサイバー防衛の神話である。

2000 年問題との共通点

ミュトス登場のニュースを読んだ際、即座に思い起こされたのは、1990 年代末の 2000 年問題 (Y2K) である。2000 年問題は、当時、放置すれば深刻なシステム障害を引き起こし得る現実のリスクと考えられた。各国の政府や企業は、日付処理の不具合を避けるため、ソフトウェアの改修、ハードウェアの更新、システム点検に巨額の資金を投じた。因果関係はともあれ、懸念されていた深刻な混乱は無事回避されたが、後から振り返れば、その投資の一部は IT 投資の巨額の前倒しであり、1990 年代末の IT ブームを助長したと思われる。危機対応として必要な投資と、恐怖に駆動された過剰投資の境界は、事前には見極めることができなかった。

ミュトス型の AI サイバーリスクにも、これと似た性格があるのだろう。AI による脆弱性発見能力が高まるのなら、防衛投資は不可欠となる。とくに金融機関にとって、サイバー事故は単なる業務の滞りでは済ませられない。決済システムの停止、不正送金、顧客情報の漏洩、ネットバンキングへの不信は、預金者や取引先の不安を招き、場合によってはデジタル銀行取付に発展し得る。レガシーシス

テム問題や限られたサイバー投資能力の制約を抱える中小金融機関には、大きな負担となるのだろう。

2000年問題との決定的な違い

しかし、2000年問題とミュトス型のAIサイバーリスクの間には、決定的な違いがある。2000年問題には、2000年1月1日という明確な期限が存在した。そこを無事に通過すれば、危機対応投資は一段落した。これに対し、AIサイバーリスクには終点が存在しない。

攻撃側のAIが進化すれば、防御側のAIも更新されなければならない。クラウド、API（application programming interface）、オープンソース、サプライチェーンなどが複雑化するほど、新たな脆弱性も生まれる。つまり、ミュトスが象徴するのは、一回限りの危機対応投資ではなく、恒久的なAI防衛投資の始まりである。

シーシュポスの神話

ここで思い出されるのは、アルベル・カミュの『シーシュポスの神話』である。元はギリシャ神話であり、狡知に富んだコリントス王のシーシュポスは、神々を欺いた罰として、巨大な岩を山頂まで押し上げることを命じられた。しかし、山頂に達した途端に、岩は再び転がり落ち、シーシュポスは麓からまた岩を押し上げなければならない。その労苦には終点がない。カミュはそこに不条理を自覚しながら、なお生きる人間の姿を見た。

AI防衛投資もまた、現代版のシーシュポスの神話となりはしないか。企業は、AIによって発見された脆弱性をAIによって塞ぐために投資する。だが、岩は山頂に留まってはくれない。モデルが進化すれば、新たな脆弱性が見つかる。脆弱性を塞げば、攻撃側は別の経路を探す。クラウドが強化されれば、APIやサプライチェーンが次の弱点になる。システム検査を終えたと思えば、次のAIモデルの更新が新たなシステム検査を必要とする。こうして企業は、危機の回避という名の下に、終わりなきAI投資の坂を上り続ける。投資の必要性が強迫観念となる時、有用な投資は容易に過剰投資へと転化する。

測定できない費用対効果

これまでのAI投資は、テック企業の経営者が語る未来への楽観によって膨らんできた。生成AIがホワイトカラー労働を変え、人手不足を補い、科学的発見を加速し、新たなビジネスを生むという期待だった。しかし、ミュトス以降、AI投資は安全を守るための恐怖によっても、膨らんでいく。成長期待に基づく投資であれば、いずれは収益性が問われなければならない。AI投資がどれほど売上や利益を増やしたのか、生産性を本当に引き上げたかが検証されなければならない。現実には、そのタイミングが近づいていたはずだ。しかし、防衛投資の性質は異なる。サイバー攻撃を受けなかったこと自体が成果であるから、費用対効果は測定できない。

しかし、同業他社がAI防衛に投資すれば、自社だけが投資をしないというリスクは取れない。監督当局、顧客、株主、取引先から「十分な対応をしていない」と見なされることを恐れ、企業は横並びで投資を拡大する。その過程では、クラウド企業、半導体企業、サイバーセキュリティ企業、コンサルティング会社がさらに売上を拡大する。反発したくても、「AI攻撃にはAI防衛が必要だ」という主張は、それ自体としては一定の正当性を持つから、厄介である。筆者は、AIブー

ムは、過剰投資の臨界に近づいていたと考えていたが、ミュトス登場で、テック業界は今回のブームの大きな延命装置を手に入れたのだろうか。

現代版シーシュポスの神話の誕生

ミュトスとは神話である。だが、もはやAIが人類を解放するという明るい神話だけではなくになった。AIが見出すシステムの脆弱性を、さらにAIで塞ぎ続けなければならないという、シーシュポス的な神話である。AIが脆弱性を発見し、AIがそれを塞ぎ、さらに高度化したAIがまた新たな脆弱性を見つけ、岩は何度も転がり落ちる。AI投資の過剰は、楽観だけでなく恐怖によってこそ生まれる。

2000年問題は期限付きの恐怖だったが、ミュトスは期限なき恐怖である。現代版シーシュポスの神話が始まった。

<参考文献>

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