

CYBERSECURITY

ACCELERATOR

The Cybersecurity Accelerator has been designed to help stakeholders across the cybersecurity landscape understand a complex market in transition. Wherever you play, it will arm you with a comprehensive set of data and research deliverables to help you make the critical decisions necessary to succeed.



MAXINE
HOLT

RESEARCH
DIRECTOR

“ Today’s enterprises face a broad and evolving **cyberthreat landscape** and a highly complex cybersecurity picture. There is no desired end-state in an organization’s quest to address security challenges; instead a **constant need to improve security** posture and remain as protected as possible whilst still doing business. ”

CYBERSECURITY IS IN THE MIDST OF A PERFECT STORM OF DEMAND

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Headlines with some kind of cybersecurity angle appear on an almost daily basis. Security challenges, particularly around cybersecurity in the digital world, are near the top of board-level concerns. Ovum's 2018-19 global ICT decision-maker survey* shows that technology to manage security, identity, and privacy is a top-three focus for organizational security, yet the same survey shows that fewer than 15% of these organizations have a proactive approach to cybersecurity and digital risk.

For enterprises, an increasing recognition that security incidents and breaches cannot always be prevented has resulted in a broadening of focus beyond prevention to detection and response. Their challenge is now in developing a proactive approach, which requires a business-wide – and not just technology-focused – response. The complexity of the cybersecurity environment, along with a skills shortage, makes this shift difficult, as does a legacy of multiple point solutions predominantly focused on prevention. Increasingly, enterprises are looking to simplify by adopting a platform approach, with many larger organizations now seeking managed service solutions to help address the cybersecurity threat from end to end.

For technology vendors, the imperative is to respond to this shift. For many, this will have a twin focus: First, broadening and repositioning their product suite to meet enterprise demand beyond just prevent, to include detect and respond. Second, as the market begins to shift in favor of managed services, it's becoming crucial for many cybersecurity vendors to ensure their products integrate with platform plays.

For managed services providers, the market shift toward cybersecurity platforms is clearly welcome. However, delivering on enterprise expectations requires significant investment in both expertise and best practice. There will be an expectation that the latest security products are incorporated in any platform, and a demand for evidence of a continuous improvement cycle in both technology and service management.

The cybersecurity threat expands as organizations become increasingly reliant on the digital economy. With each new digital offering, supplier relationship, or partner, a new potential vector for attack opens. With the potential for long-term damage growing, the answer for most should be to embrace the shift to risk-driven security, however complex.

Ovum's analyst team has years of experience advising enterprises on cybersecurity best practice, policy, and implementation. This expertise, and our deep understanding of the shift to end-to-end security and its implications, means we are uniquely able to advise technology vendors and service providers on how to profit in this rapidly transitioning market.

The Cybersecurity Accelerator draws together Ovum's cybersecurity market analysis and data into a single subscription service, with regular updates and direct support from our team of expert analysts. This service provides all the market intelligence you need to capitalize on the cybersecurity opportunity.

***Ovum's ICT Enterprise Insights** is the largest annual survey program addressing ICT drivers, priorities, and investment by technology and industry. [Learn more](#)

HOW WE HELP

As organizations struggle to come to terms with **increasingly complex cybersecurity threats** this service identifies best practice for enterprises and the **significant opportunities** available to vendors and managed service providers.

Cybersecurity Accelerator will help you address these key questions:

For Security Technology Vendors

- How do we match our products to the most critical concerns on the enterprise security agenda?
- Which channels in an increasingly complex ecosystem offer the best route to market for our products?
- Where should we play and who should we partner with to ensure we succeed in a dynamic and consolidating security technology market?

For Managed Service Providers

- How should we build comprehensive and robust security products into our service offering?
- How should we position and message the benefits of a managed service approach to enterprise security?
- How do we bridge between onboarding the latest cybersecurity solutions and meeting the wider service needs of our enterprise customers?

For Enterprises

- How do we assess the risk profile of our organization?
- Which products and platforms are most appropriate for securing our systems and information?
- How do we address a shortage in specialist security skills and expertise?

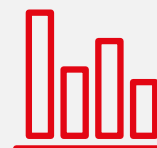
WHY OVUM?

CYBERSECURITY
ACCELERATOR



Our Experience

For more than 30 years our team has been advising enterprises on security policy and practice, and guiding vendors to market success



Our Data and Forecasts

Our market data supports robust data driven decision-making with detailed insight into the enterprise security agenda, and forecast spending for cybersecurity products by segment



Our Connected Approach

We provide fast actionable advice to vendors on market demand, driven by our close connection to the enterprise and developer communities through Informa's BlackHat and DarkReading

CYBERSECURITY AND ITS **SIX** ORGANIZATIONAL LEVERS

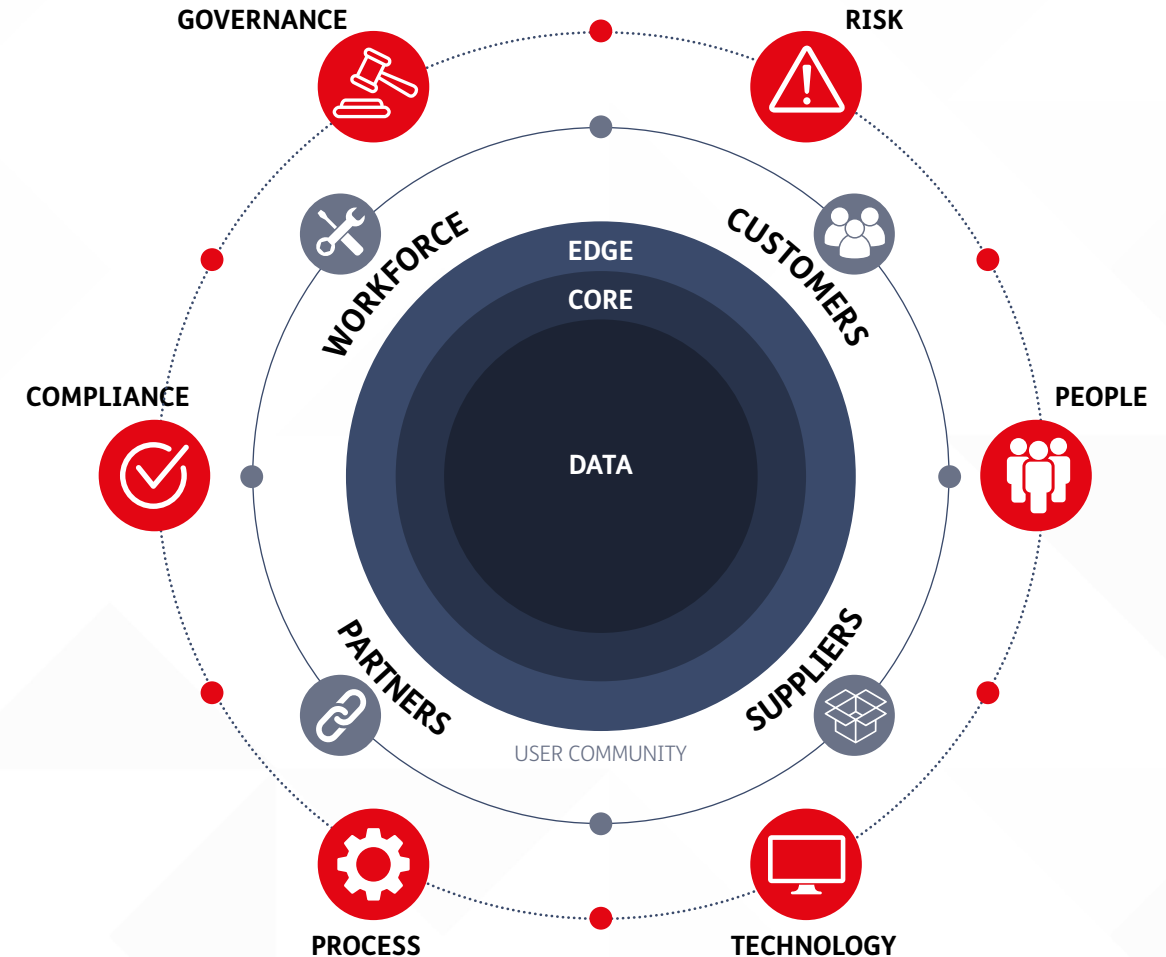
Cybersecurity is the broadly recognized term for digital security – the practice of protecting digital systems, data, and devices from security incidents and breaches. Ovum’s definition of cybersecurity takes into account **how enterprises interact** with their workforce, customers, partners, and suppliers, and also crucially the **impact of six key levers** that define an organization’s approach to security.

Technology topics such as Edge, Core, and Data security are at the center of an enterprise’s defenses. However, Ovum’s cybersecurity analysis also addresses their interplay with the other crucial levers acting on enterprise security:

- **Governance:** organizational governance drives security governance
- **Risk:** organizational risk drives information risk
- **Compliance:** some compliance expectations drive security demands
- **People:** requirement for education, awareness, and behavior change
- **Process:** ensuring that processes are followed, not circumventing security controls
- **Technology:** working within the overall IT estate

This holistic and clearly defined approach enables Ovum to provide the most comprehensive and robust market intelligence available on the impact of cybersecurity – and the opportunities.

Ovum’s definition of cybersecurity and its levers



The banner features a dark blue background with a complex network of glowing blue and yellow dots connected by thin lines, resembling a digital or celestial map. A bright, glowing orange and yellow nebula-like cluster is visible in the upper right. The text is white and positioned on the left side.

CYBERSECURITY ACCELERATOR RESEARCH THEMES FOR 2019

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Cybersecurity complexity demands platform and service provider support

Today's organizations face an ever-evolving cyberthreat landscape, and high-profile security incidents and breaches will remain in the headlines. Driven by compliance demands as well as protecting reputation, significant investment in security products will continue. However, a more holistic view of cybersecurity posture is required, and organizations are evolving to a platform approach to reduce product complexity. Enterprises will continue to shift parts of their security operations to managed service providers.

Security and resilience to protect enterprise assets

Enterprise customers have grown more confident in the security and resilience of public cloud platforms. Security requirements are also expanding, with emerging IoT and 5G applications. However, there's a shortage of talent to architect and manage enterprise IT security. Enterprises need help to protect against, detect, and respond to increasingly sophisticated cyberattacks. As digital transformation and IoT dissolve the enterprise perimeter, enterprises will become increasingly dependent on service providers to deliver actionable threat intelligence and managed responses to attacks that can come from anywhere.

Security posture shifts to the right

To maintain a security posture, enterprises deploy security controls in the broad categories of "prevent," "detect," and "respond." The vast majority of security technology budget has traditionally been focused on prevention products. However, with increasing recognition that not all security incidents and breaches can be prevented, enterprises are spending a greater percentage of budget on detection and response security technology and services – Ovum describes this as the "shift to the right" in building security controls.

Risk-driven security focuses protection where it is needed most

Traditionally, security controls have been based on deploying a security product to mitigate a specific threat, then surrounding the technology with people and process-based security controls. However, not every threat requires the same level of treatment. The move to organizational security posture based on identified risks is gathering momentum, with enterprises increasingly focusing security efforts where they are needed most. The objective of risk-driven security is to prioritize the mitigation of risks that could cause the greatest harm to the organization.

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RESEARCH DELIVERABLES

The Cybersecurity Accelerator portfolio provides a **specially curated selection of cybersecurity research** from across Ovum's portfolio, along with research highlights from our sister company **DarkReading**. With regular updates and direct support from our team of expert analysts, the service is designed to evolve with the market and meet your ongoing intelligence needs.

SIGNATURE RESEARCH

Cybersecurity: Impact and opportunities

This core report explores the impact of cybersecurity for enterprises, service providers, and technology vendors. It assesses the components of cybersecurity and describes how it is about much more than the technology used to protect an organization and how the market is transitioning accordingly. Published – March 2019

Strategy and market trend reports

Understand best-practice approaches to cybersecurity and the strategic and competitive challenges it poses. Our market reports deliver a comprehensive perspective on the market, including critical trends, enterprise decision-maker requirements, and a signature report providing market definition and an assessment of cybersecurity's impact for enterprises, service providers, and vendors.

5-year revenue forecasts: 2017–22

Size the market for enterprise security software across key segments – web content and email protection, endpoint and mobile device protection, identity and access management (IAM), information/data protection, security management, and network security, spanning four regions, 20 countries, and 16 vertical industries.

Evaluation reports

Understand and evaluate the likely impact of cybersecurity technologies and innovations with our Market Radar reports, and identify the leading managed security service providers, with a comparative analysis and ranking using the Ovum Decision Matrix.

Technology assessments

Assess the strength of leading and innovative cybersecurity products and services, with independent assessments of features and capabilities, SWOT analysis, enterprise deployment considerations, and vendor product strategies.

Ongoing market analysis

Stay ahead of the market with regular Research Notes addressing key developments across the cybersecurity marketplace, including vendor announcements, market innovation and trends, industry events, and research highlights from DarkReading.

Analyst support

Gain direct access to Ovum's global analyst team. Our team is already advising many leading enterprises, service providers, and technology vendors on cybersecurity best practice and market opportunities.



RICK
TURNER

PRINCIPAL ANALYST
INFRASTRUCTURE
SOLUTIONS

“ As they move towards a more risk-based view of their security posture, organizations are cutting down on the plethora of point solutions and **moving towards a platform approach** for integrating cybersecurity products operationally. This move demonstrates a clear appreciation that **security is about a great deal more than technology.** ”

CONTACT US

To learn more about
Cybersecurity Accelerator – visit

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ovum.informa.com/cybersecurity-accelerator

ABOUT US

We provide authoritative data & forecasts, market research and analysis, bespoke consulting and end-to-end marketing services to help companies thrive in the connected digital economy.

Ovum helps service providers and their technology partners create business advantage by providing actionable insight to support their business planning, product development and go-to-market initiatives.

Visit ovum.informa.com to learn more.

THE CYBERSECURITY MARKET IS TRANSFORMING

Are you ready to take advantage?

With an increasing recognition that not all security incidents can be prevented, enterprises are spending a greater percentage of their budget on detection and response.

Does the positioning and messaging of your product or service reflect this shift?

An Ovum Security Market Assessment is the perfect marketing asset to help you reframe your offering to match the demands of the quickly evolving enterprise security agenda.

Commission an **Ovum Security Market Assessment** for:



An independent assessment of your product or service portfolio delivered by an experienced team of subject matters experts



A clear product or service summary designed and framed for use by enterprises



A campaign asset ready to be deployed by your go-to-market teams

Contact us now to learn more.