

IT Security Market Overview

Gabriel Coimbra
Research & Consulting Director
IDC Portugal

Porto, 29 de Maio 2008

www.idc.com

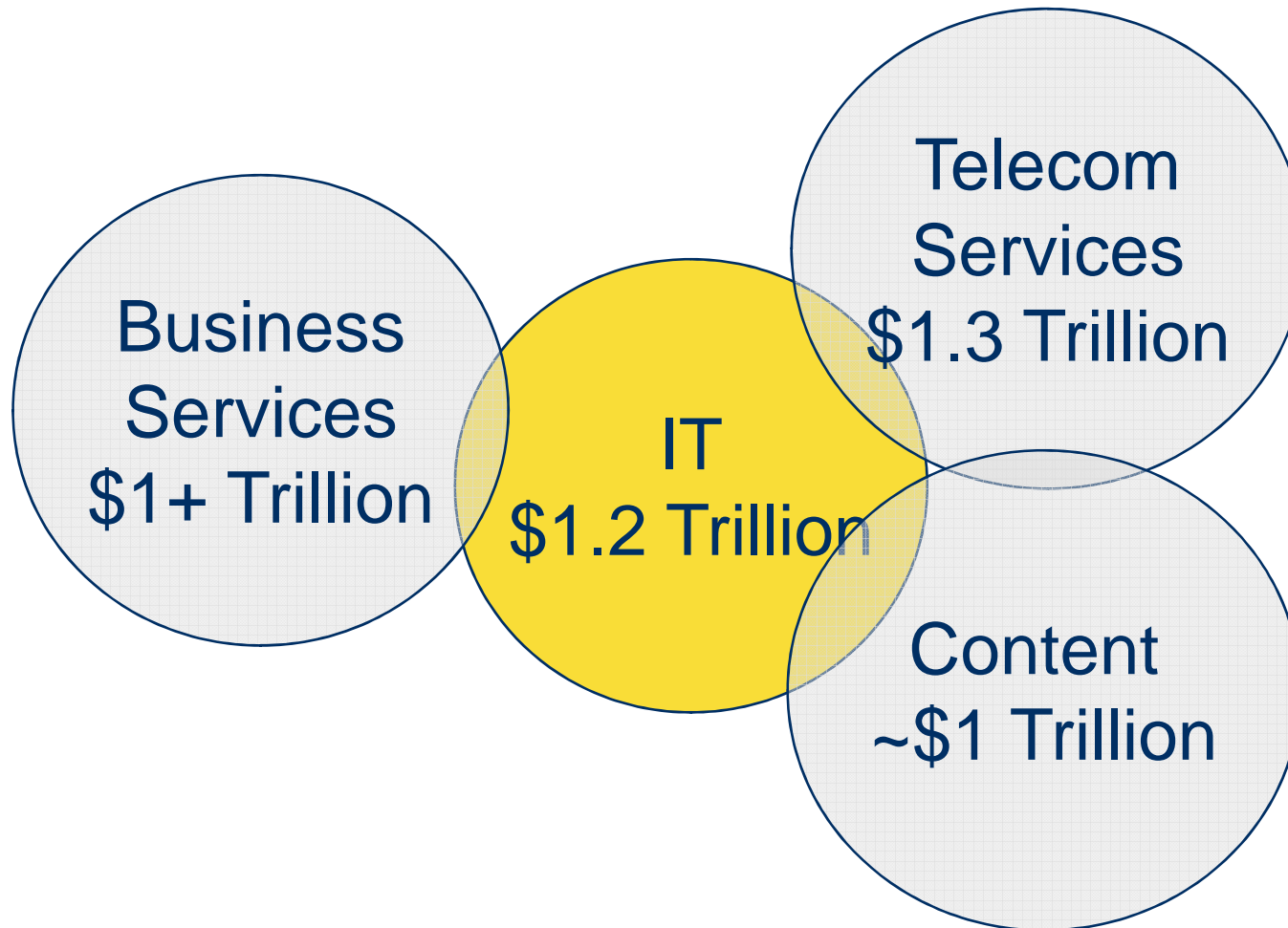
Agenda

- Market context
- IT Security context
- CSO Agenda
- IT Security market
- Conclusion

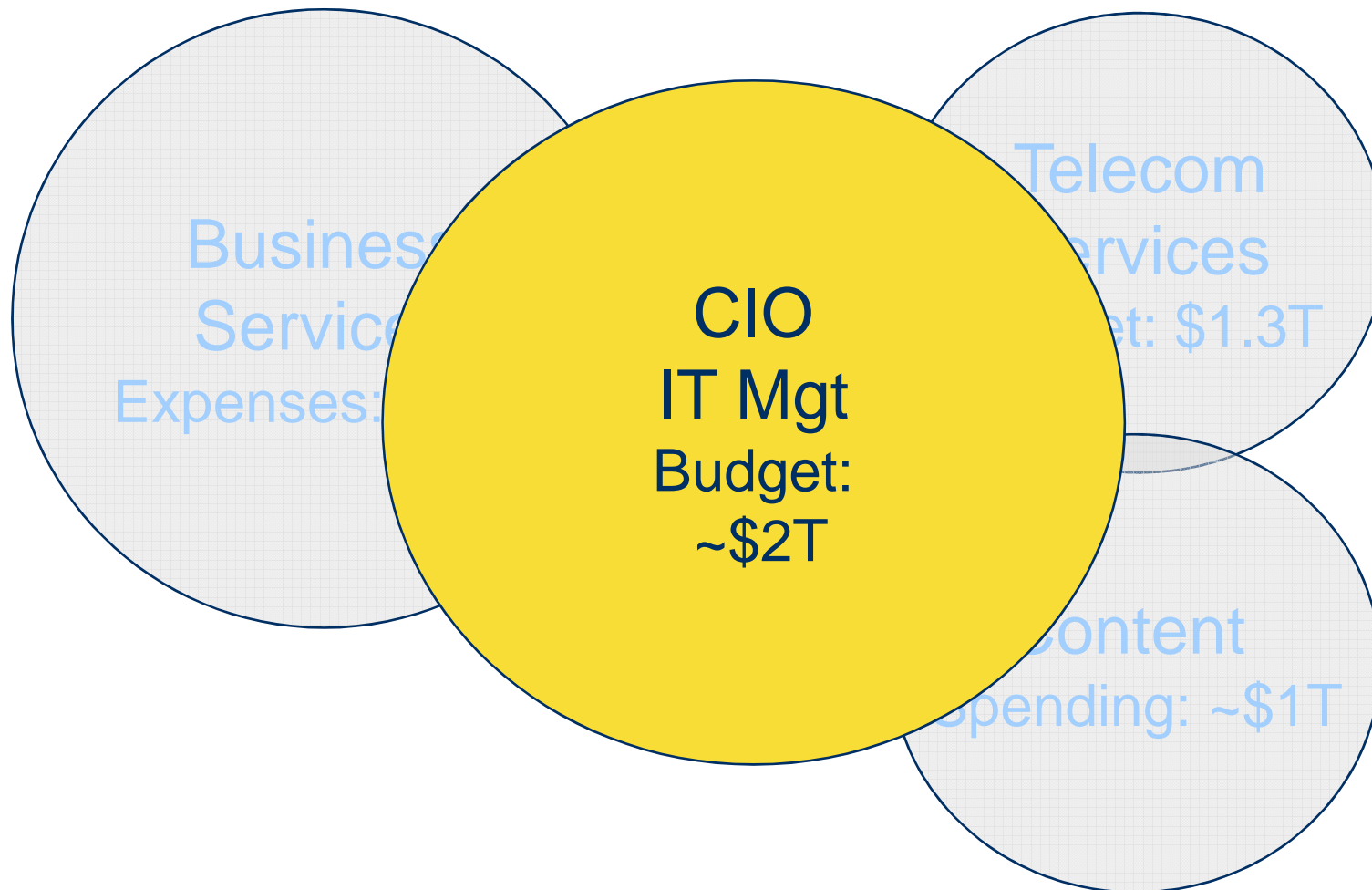
The Expanding IT Realm

IT
\$1.2 Trillion

The Expanding IT Realm

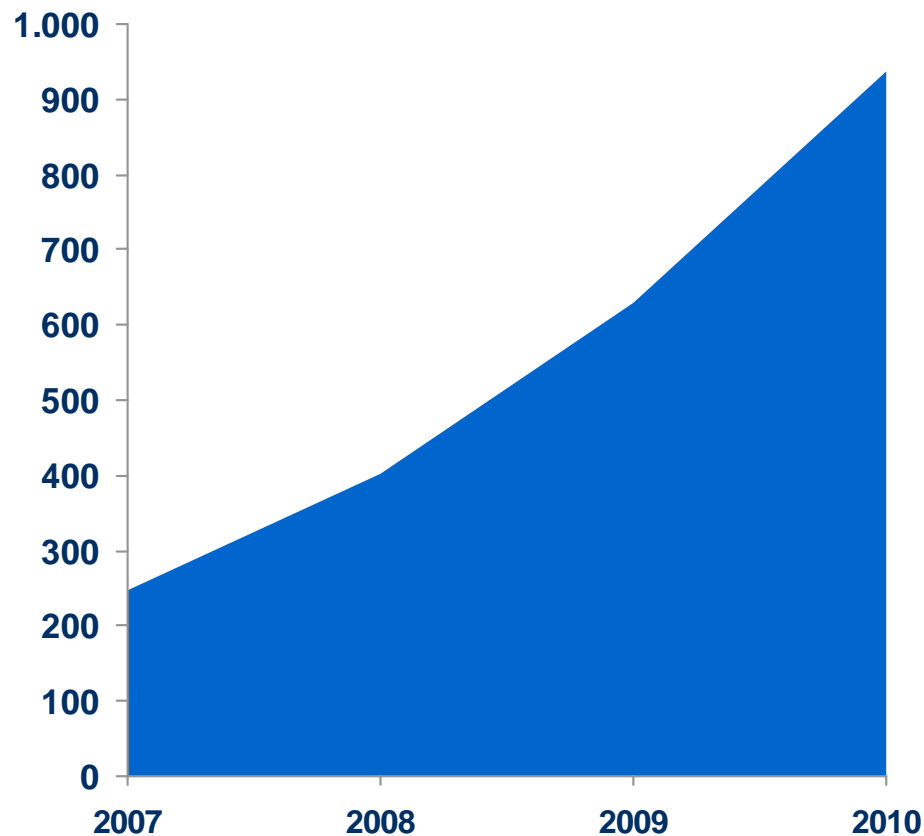


The Expanding IT Realm



The Information Explosion

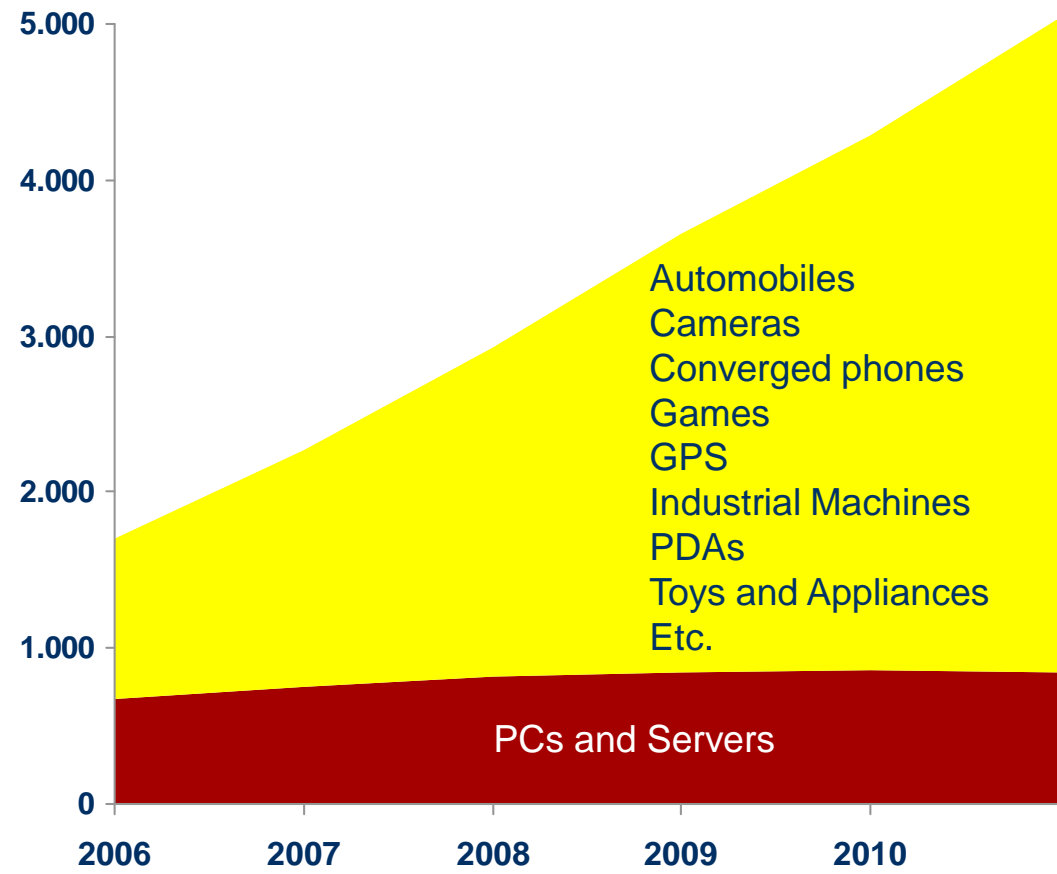
Exabytes of Information Created WW



- 90% Unstructured
- 10X File Diversity
- 70% User Created
- 85% Corporate Liability
- 30% Outside Data Center

The CIO Domain Explosion

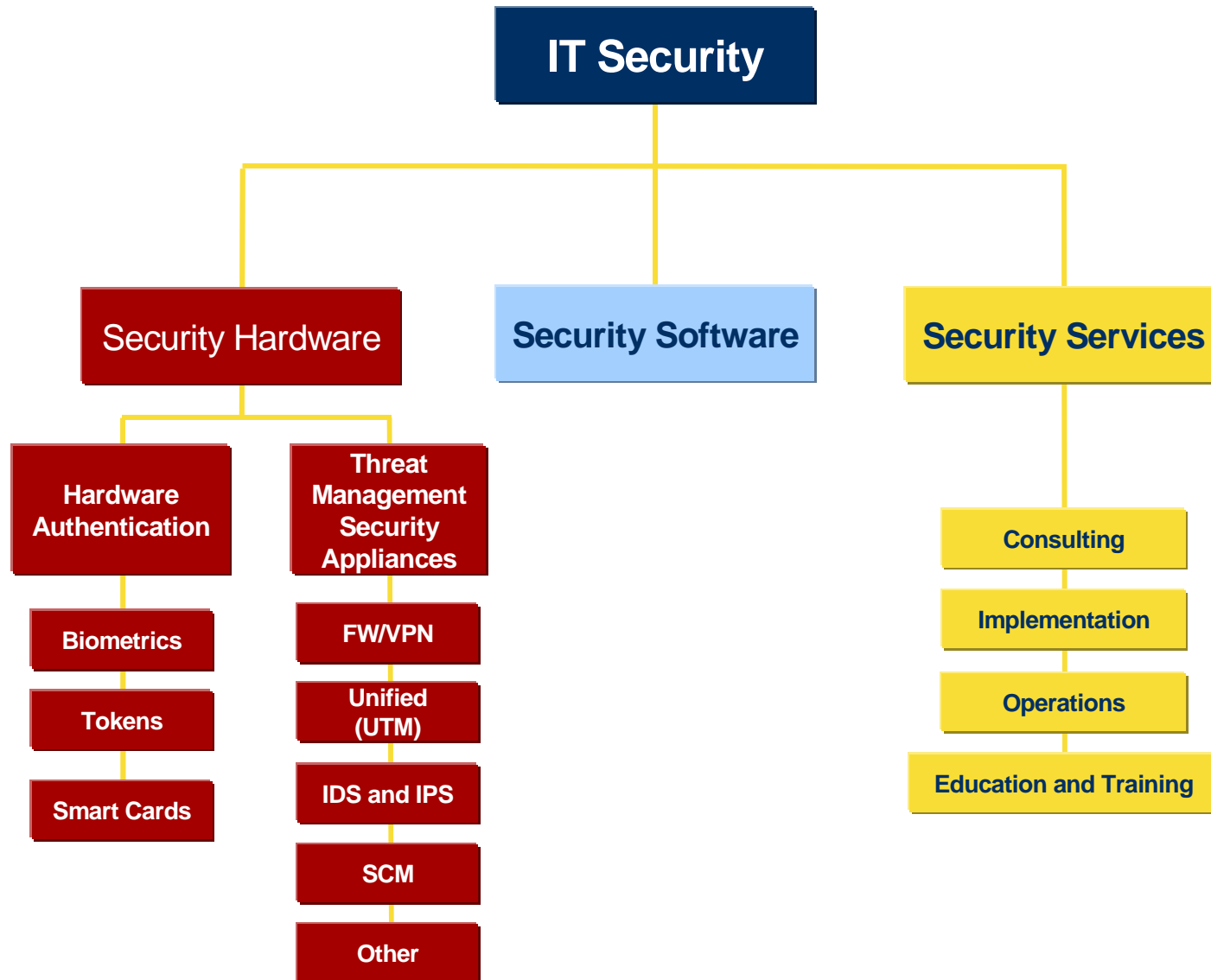
Communicating Devices* WW (Millions)



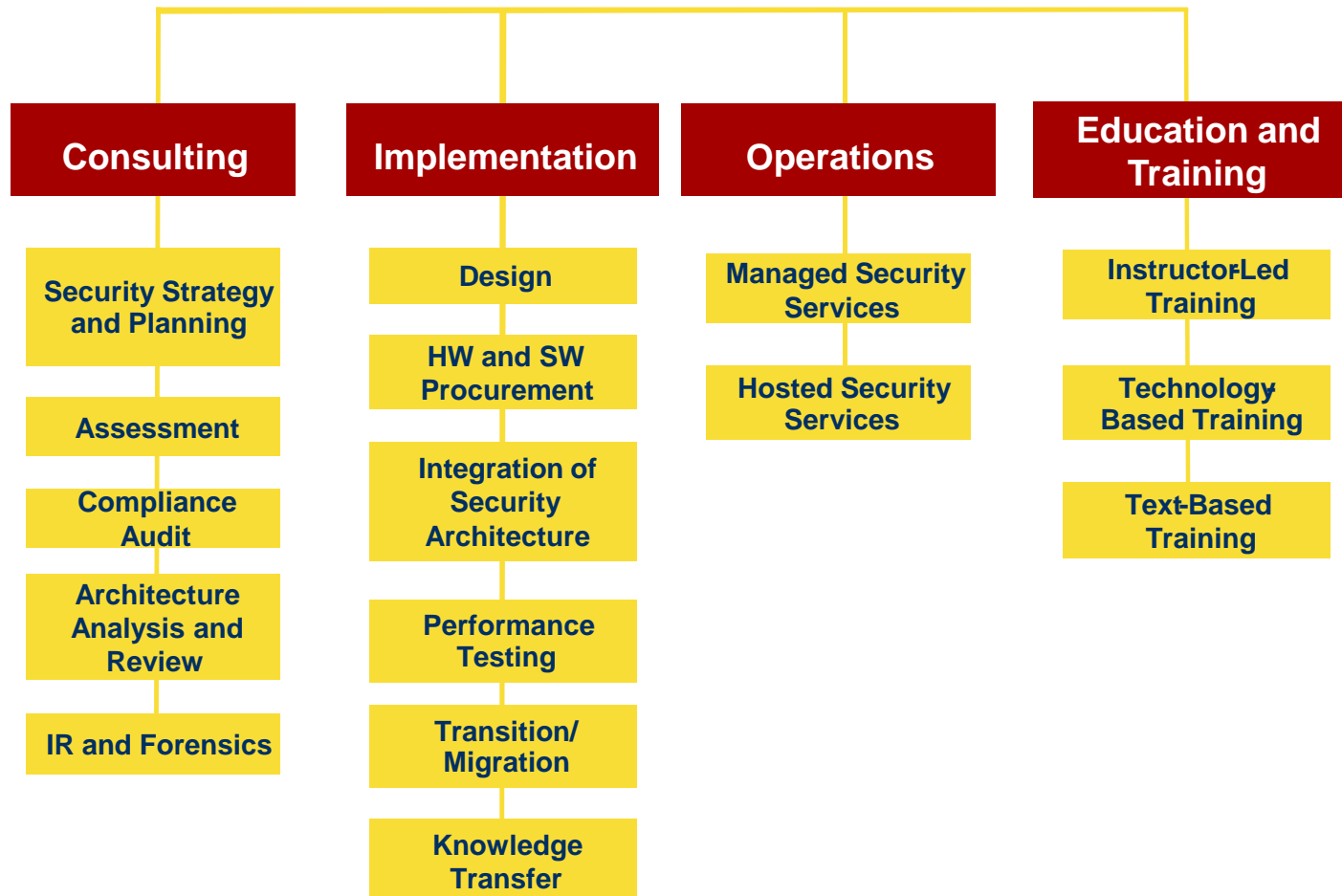
* Excludes RFID and sensors

Security Context

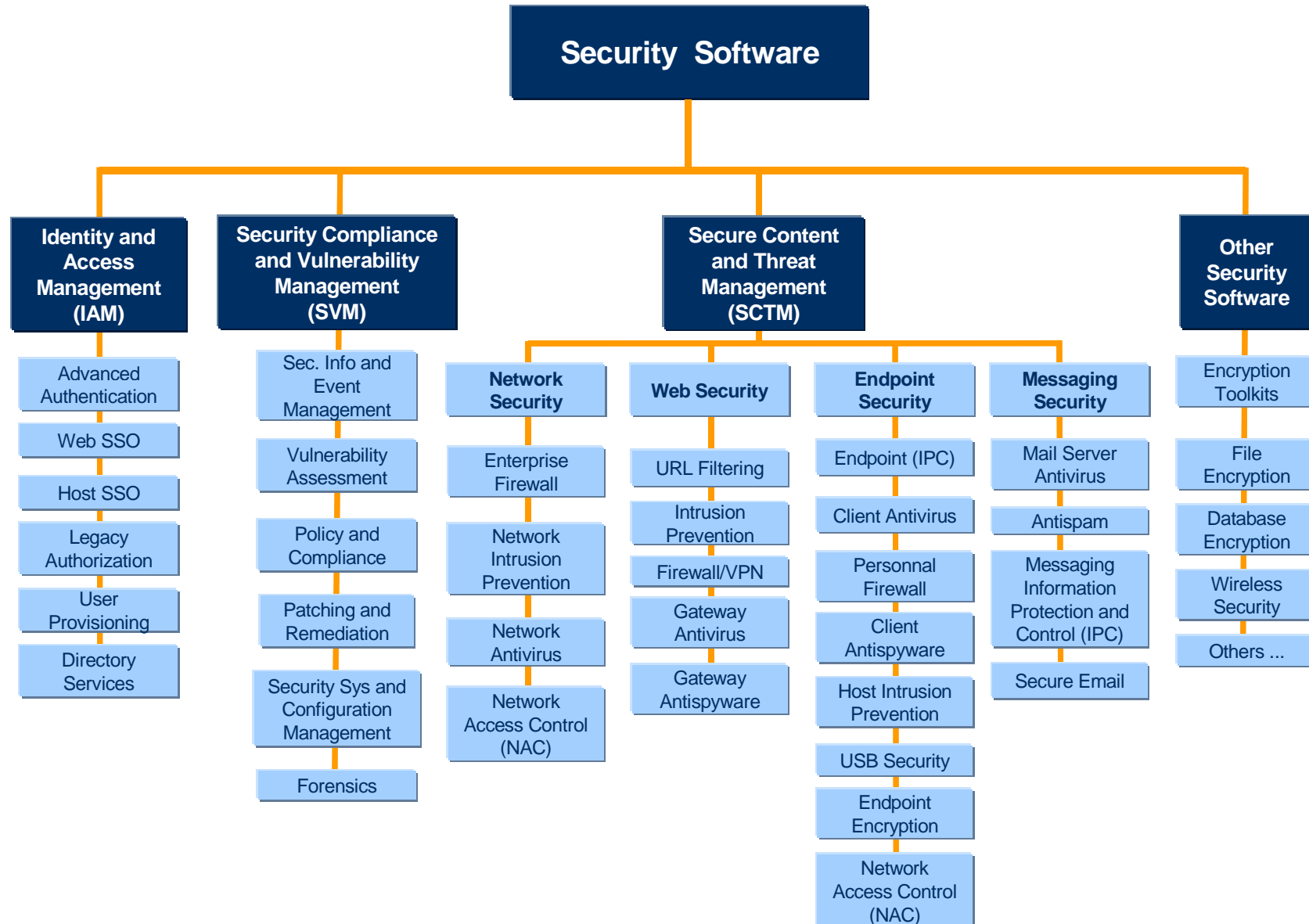
IT Security context



Security Services



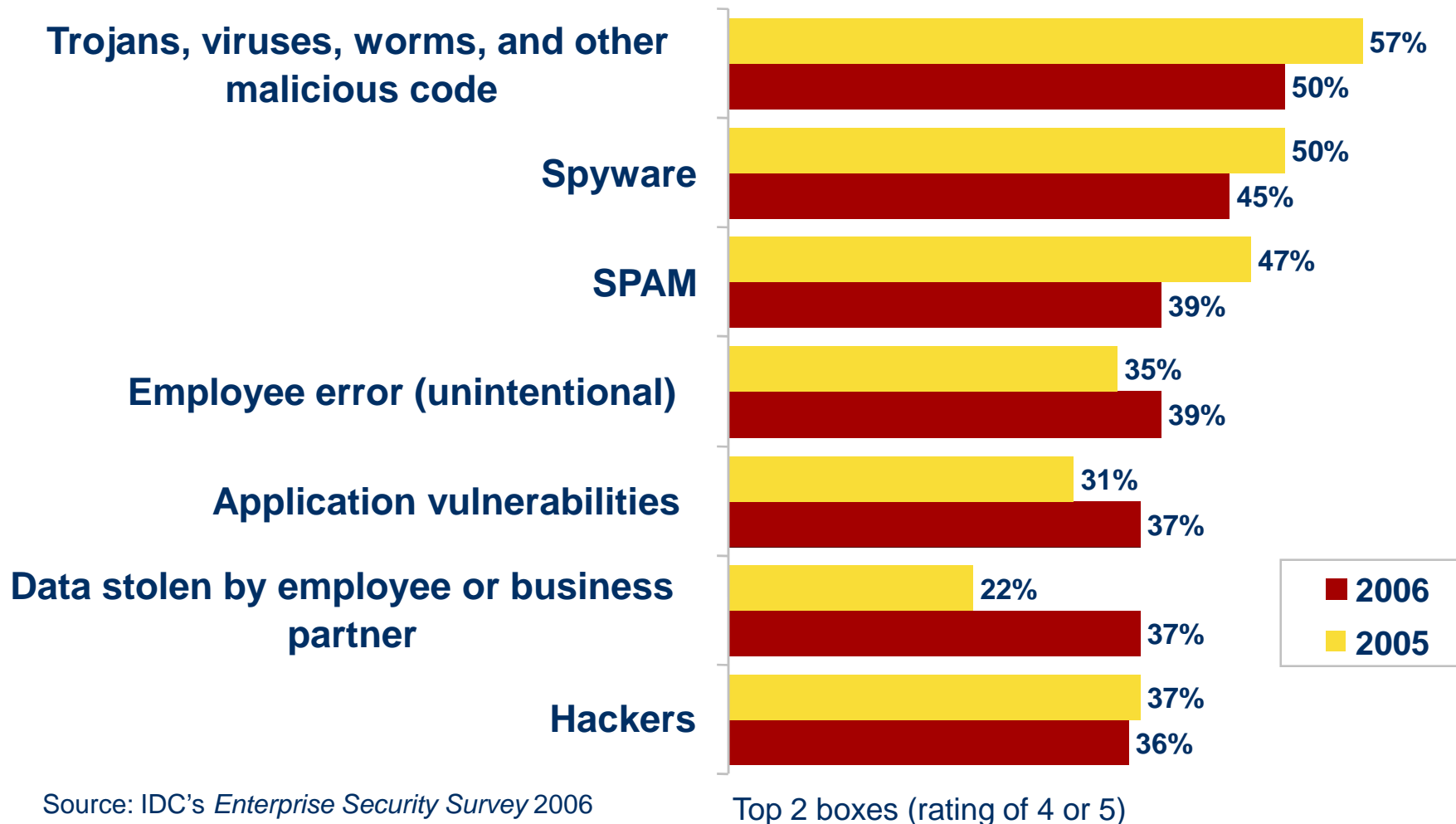
IT Security context



Today: Current Situation

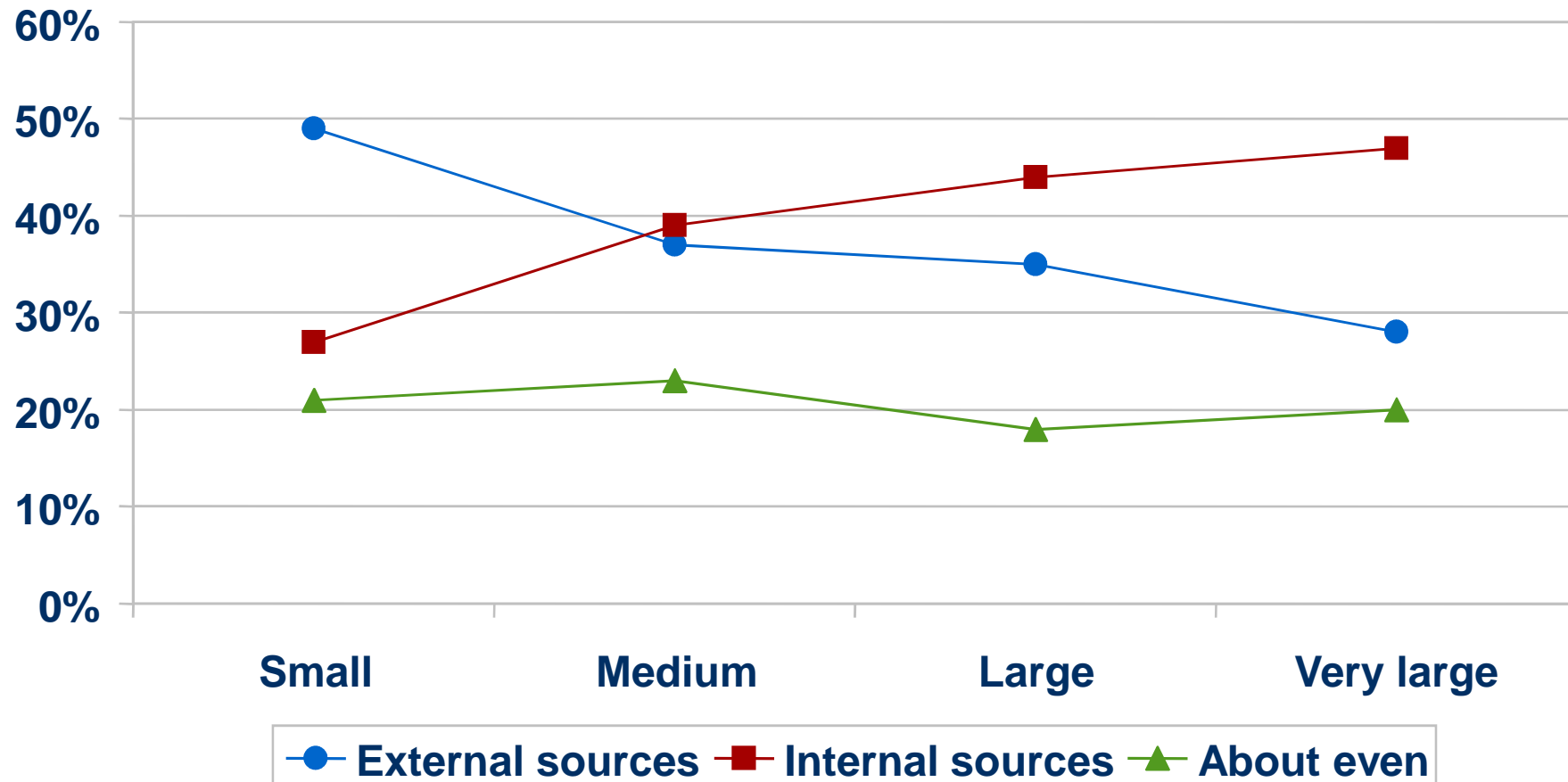
Current Threat Environment

How would you rate the items below on the threat each poses to your company's enterprise network security? (Scale: 5 = significant threat; 1 = no threat)



Current Internal v. External Threats

Q: Do you believe that the most serious threats to your company's enterprise IT infrastructure originate from internal or external sources?

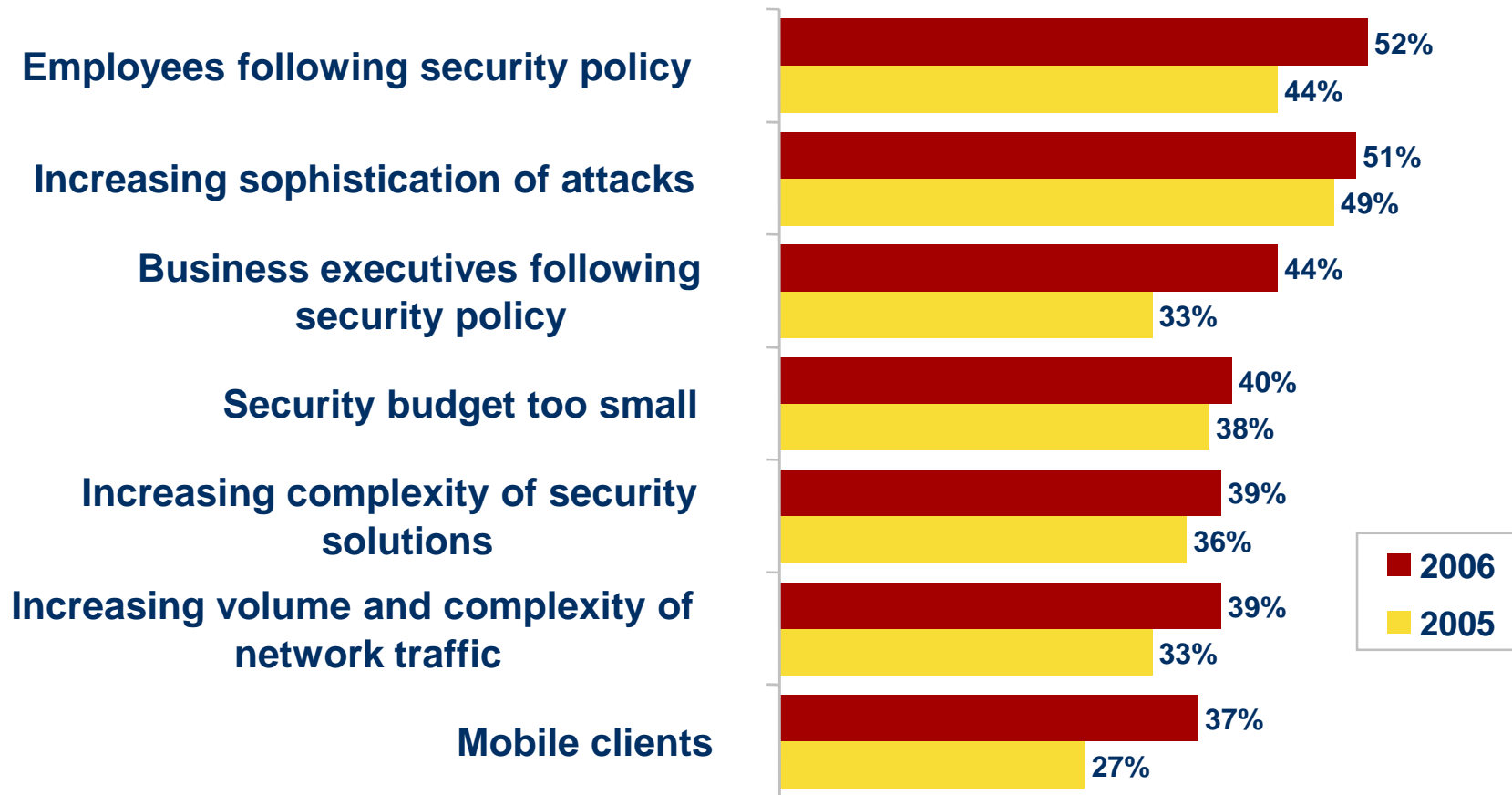


Source: IDC's *Enterprise Security Survey 2006*

Tomorrow's Situation

Future Security Challenges

How would you rate the items below on the threat each poses to your company's enterprise network security? (Scale: 5 = significant threat; 1 = no threat)



Source: IDC's *Enterprise Security Survey 2006*

Top 2 boxes (rating of 4 or 5)

What's on the Agenda for CSOs?

(And What Will Drive the Market for the Next Three Years)

www.idc.com

1 - Process

- Compliance and risk assessment/management
- Information protection and control
- Security process (incident reaction)

2- People

- User escort
- Endpoint protection
- IAM

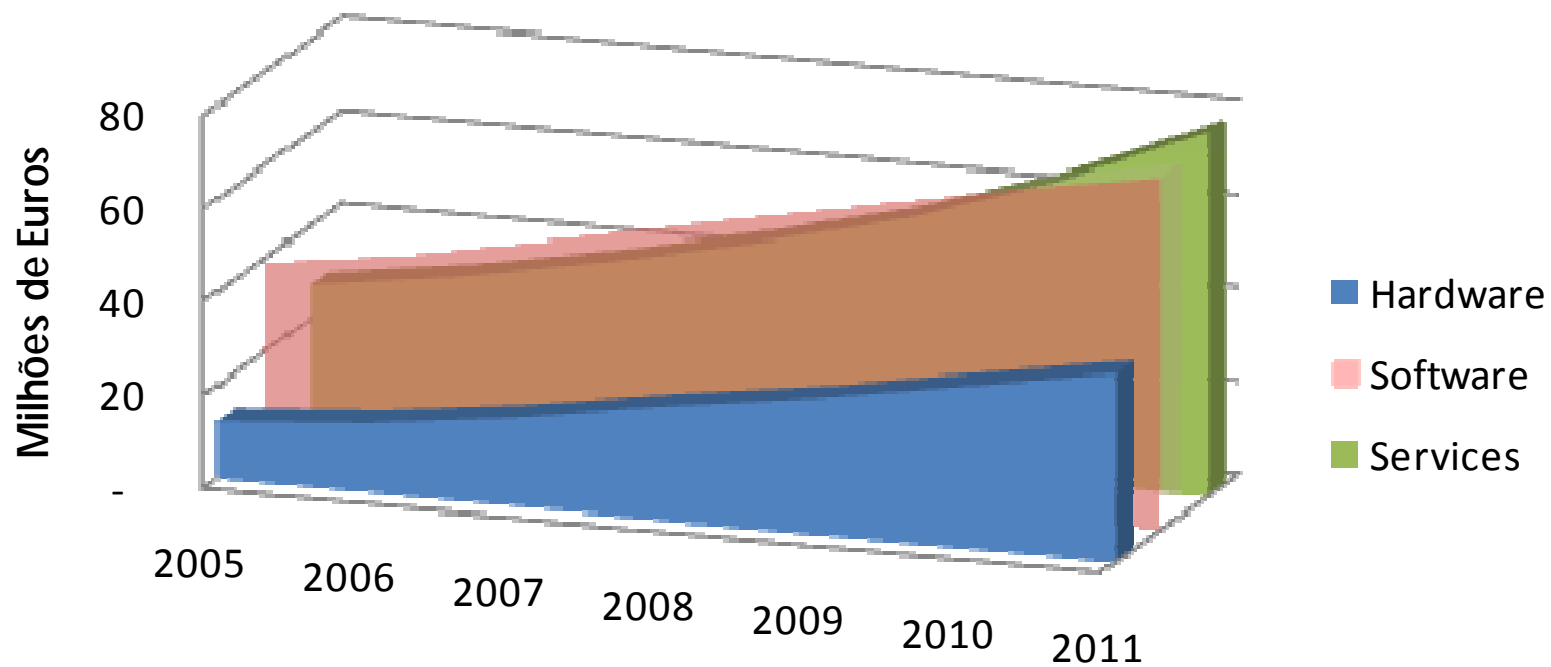
3 - Technology

- Best of breed
- Mixing vendors
- Refocus on real security

IT Security Market

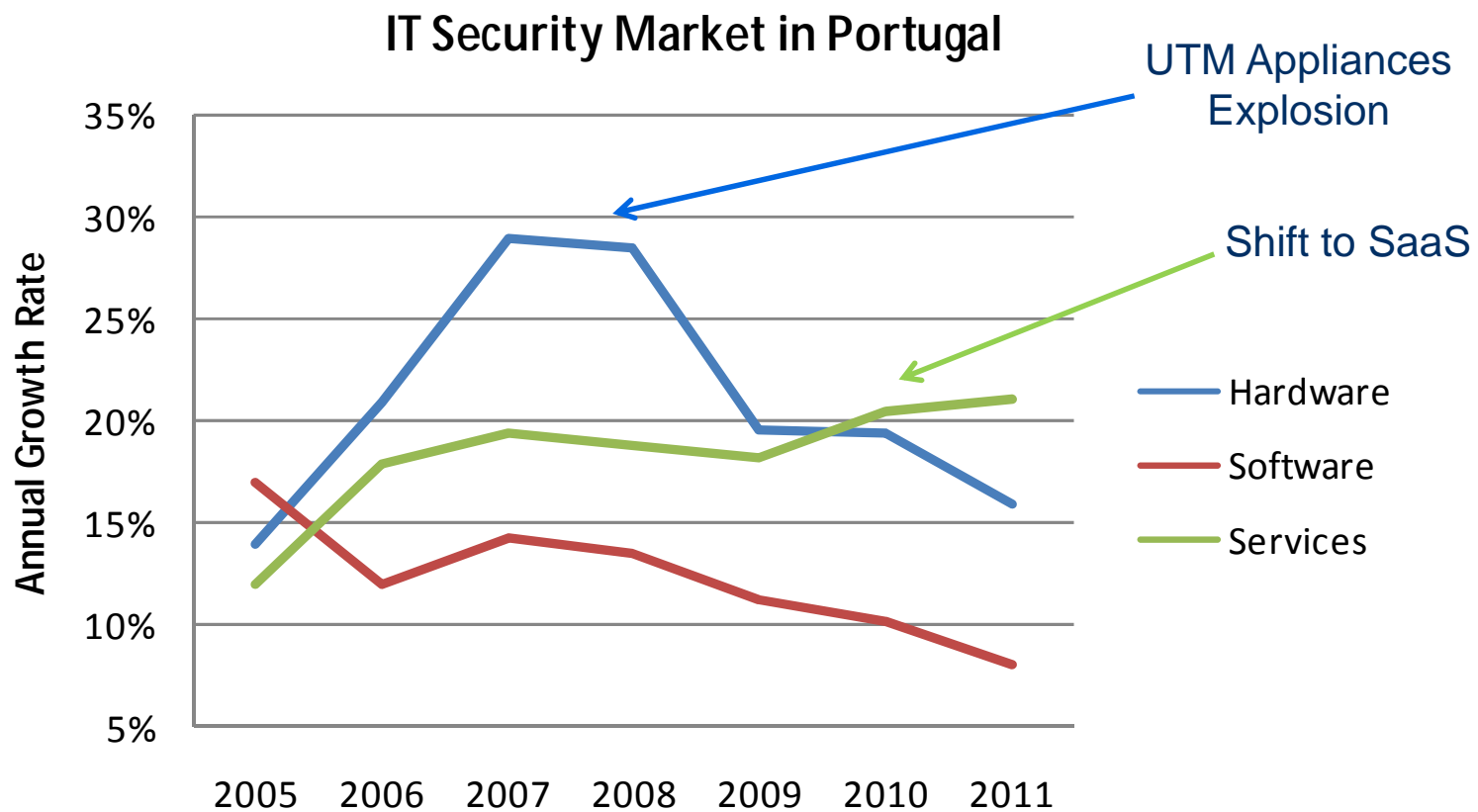
www.idc.com

IT Security Market in Portugal



Source: IDC, 2007

Security Revenues Growth



Source: IDC, 2007

Conclusion

www.idc.com

Conclusion

Traditional IT security over-protects the wrong assets, over-reacts to the unexpected and over-spends on almost everything.

IDC believes the **risk management that applies security resources appropriately** while maximizing business agility is the **correct approach to the IT Security.**

Instead looking to IT security as a reflection, it **should integrate compliance, risk assessment and business continuity dynamics** into every process and application.

In IDC vision, **It's the only way to contain security spending** while managing the risks of doing business in a connected world and mobility environment.

Questões?

Gabriel Coimbra
Research & Consulting Director

IDC Portugal
Av. António Serpa, 36 9º andar
1050-027 Lisboa Portugal
Tel: +351 21 796-5487
Mob: +351 91 985-4722
Fax: +351 21 796-5476

gcoimbra@idc.com

www.idc.pt

www.idc.com

