# RSA®C Studio

## IT Security Industry
## Real Trends

**Richard Stiennon**

Chief Research Analyst
IT-Harvest
@cyberwar

- Mature industries consolidate: hotels, auto industry, storage

- Security will "consolidate" when threat actors go home
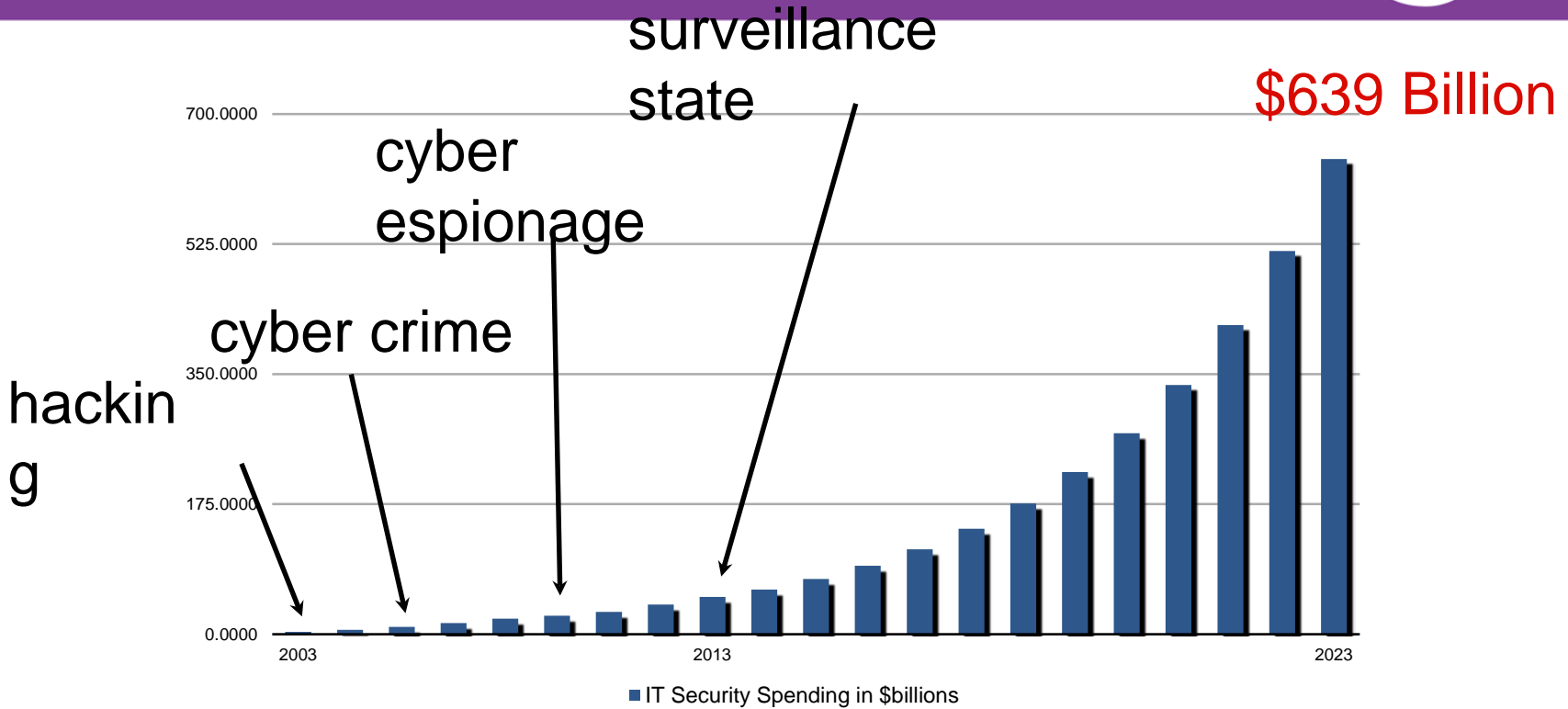
# Growth Is Mis-Stated

- You cannot grow from $2.5 billion in 2003 to $85 billion in 2013 at 9% CAGR

- Current Gartner prediction: 4.7%

- Reality: 24%+

# Ten-Fold Increase In Spending

surveillance state

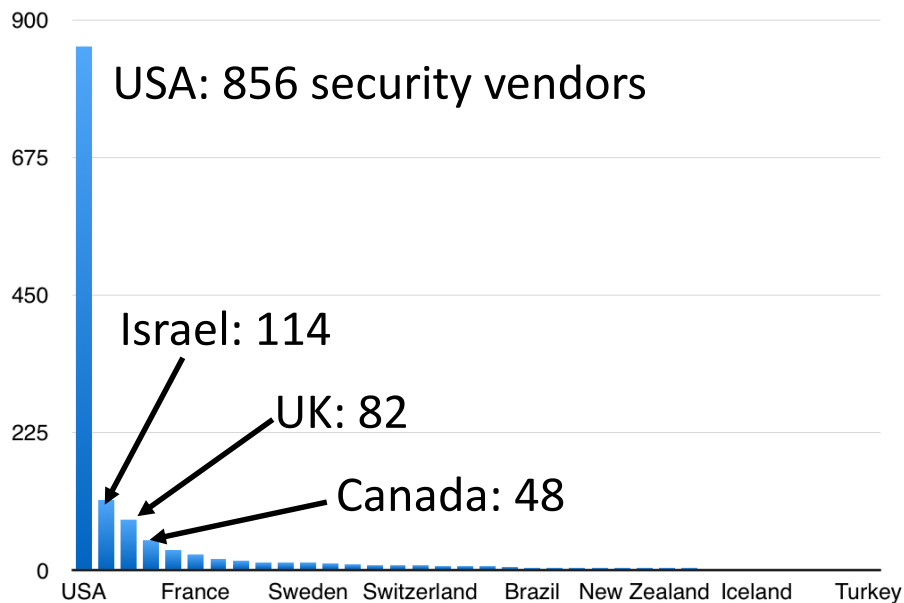$639 Billion

cyber espionage

cyber crime

hacking

Real Growth

IT Security Spending in $billions

700.0000
525.0000
350.0000
175.0000
0.0000

2003     2013     2023

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# 1,325 Vendors

- 80 Categories

- 35 Countries

- 37 States

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# By Country



USA: 856 security vendors

Israel: 114

UK: 82

Canada: 48

| Germany | 33 |
| France | 25 |
| India | 18 |
| Australia | 15 |
| Korea | 12 |
| Netherlands | 12 |
| Sweden | 12 |

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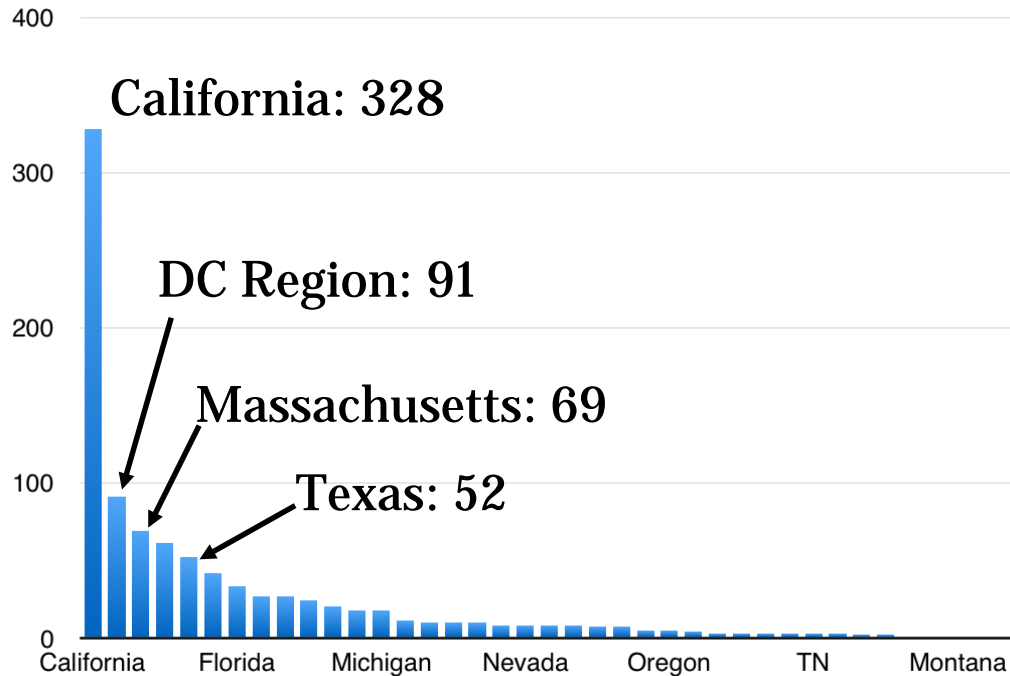
| New York | 42 |
| Florida | 33 |
| Georgia | 27 |
| Maryland | 27 |
| New Jersey | 24 |
| Washington | 20 |
| Colorado | 18 |
| Michigan | 18 |

California: 328

DC Region: 91

Massachusetts: 69

Texas: 52

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# Names, Names, Names



154 C's

172 S's

**I**dentity
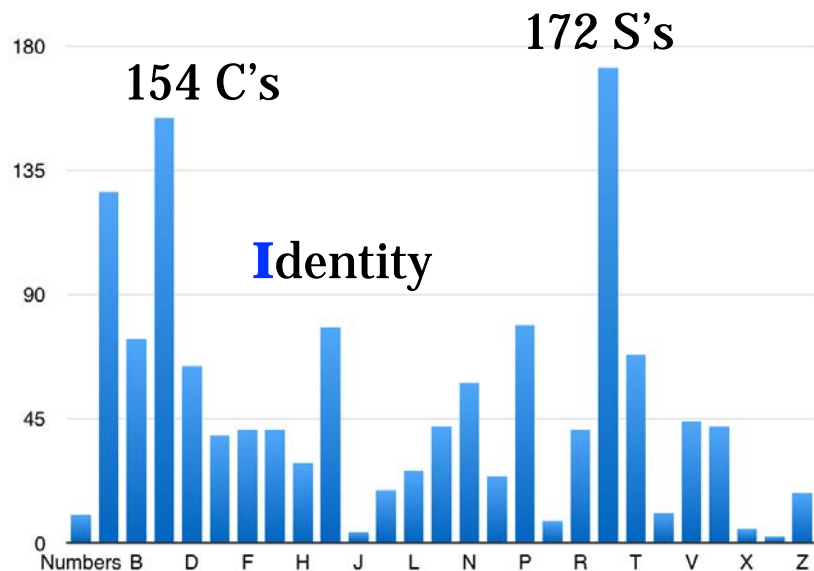
| 22 Cybers | |
|---|---|
| Cyber 20/20 | Cyberint |
| Cyber Driveware | Cyberlytic |
| Cyber Observer Ltd. | Cybernet |
| Cyber Operations LLC | Cyberoam (Sophos) |
| Cyber-SIGN | CyberObserver |
| Cybera | Cyberpen |
| CyberArk Software | CyperPoint International |
| Cyber CPR | CyberSafe Ltd. |
| Cyberready | Cyberseer |
| Cybereason | CyberSponse |
| Cyberfend | CyberX |
| Cyberflow | |

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# The Major Buckets

Network
230 vendors
$29.3 B

End point
134 vendors
$20.9 B

Data
169 vendors
$15.7 B

IAM
211 vendors
$14.6 B

GRC
190 vendors
$9.4 B

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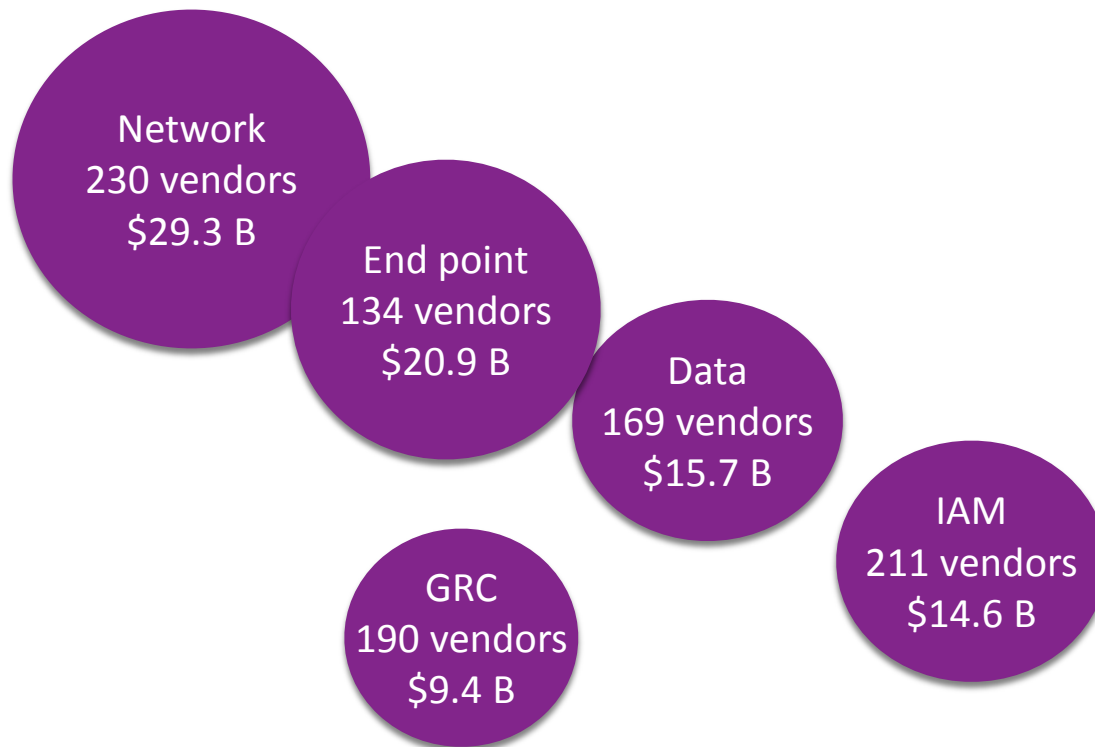
# How Will You Change Your Plans for 2016 and Beyond?

- Knowing that the number of vendors is increasing?

- Global spending is increasing at 24%?

- Security will be a $640 billion industry in 7 years?

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# Seven Software Security Myths:
## Myth Busting Security and the
## Dev Cycle

**Gary McGraw, Ph.D.**
Chief Technology Officer
Cigital
@cigitalgem

# Seven Myths of Software Security

- **Building security in** is essential for modern security

- What actually holds software security back?

- Seven myths drawn from real field data gathered @cigital

**Myth #1: Perimeter Security Works**

An outstanding defense...in 1535

**Myth #2: A Tool Will Do It ALL**

When your tool finds ten bugs, who fixes them?

**7 Myths**
of Software Security



**Myth #3: Penetration Testing is Perfect**

Economics shows that fixing things after they are done is dumb.
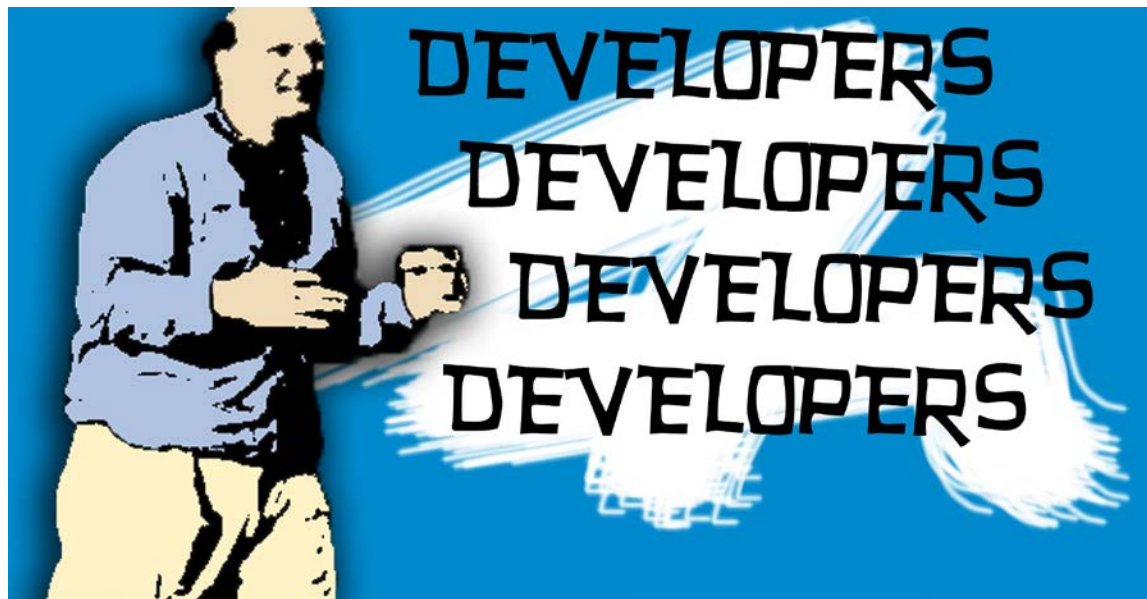
Cigital
BUILDING SECURITY IN

**Myth #4: Cryptography is Magic**

The liberal application of "magic crypto fairy dust" does not address defects.

**Myth #5: Eradicate the Bug Parade**

Defects come in two categories: bugs and flaws.

**Myth #6: Developers Should Solve the Problem**

A Software Security Group unifies security and development.

**Myth #7: Focus Only on High Risk Applications**

Risk management has well understood failure conditions.

# What now?



- Debunk the myths in YOUR organization

- Read the original article: http://bit.ly/swsec-myths

- Get a #BSIMM measurement