

3rd Platform Drives Development of Security

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50 Years of Security History

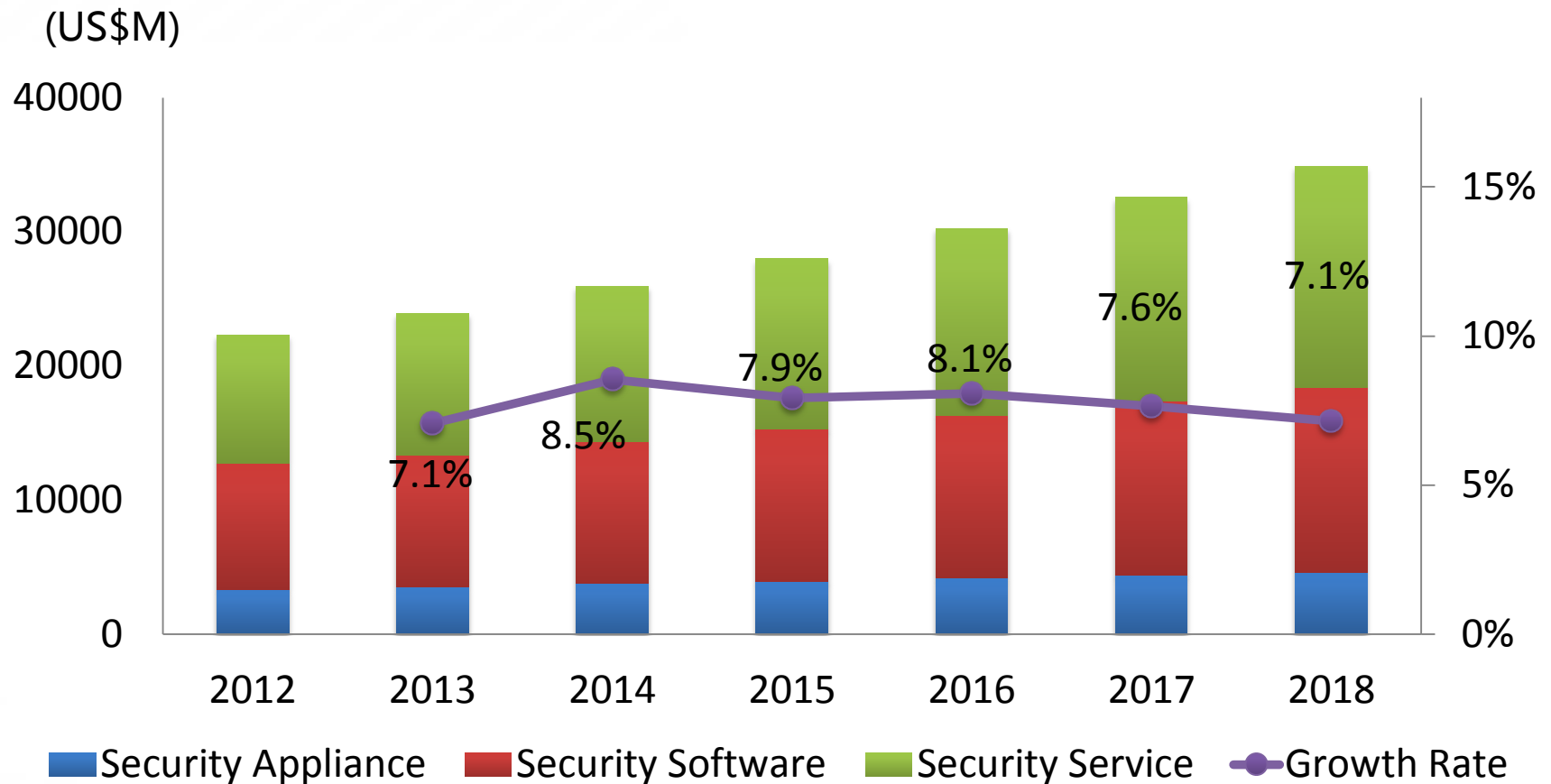


Growth in Security Solutions Shifting from Reactive to Proactive



Source: IDC, 2014

US Security Market Overview



Source: IDC, 2014

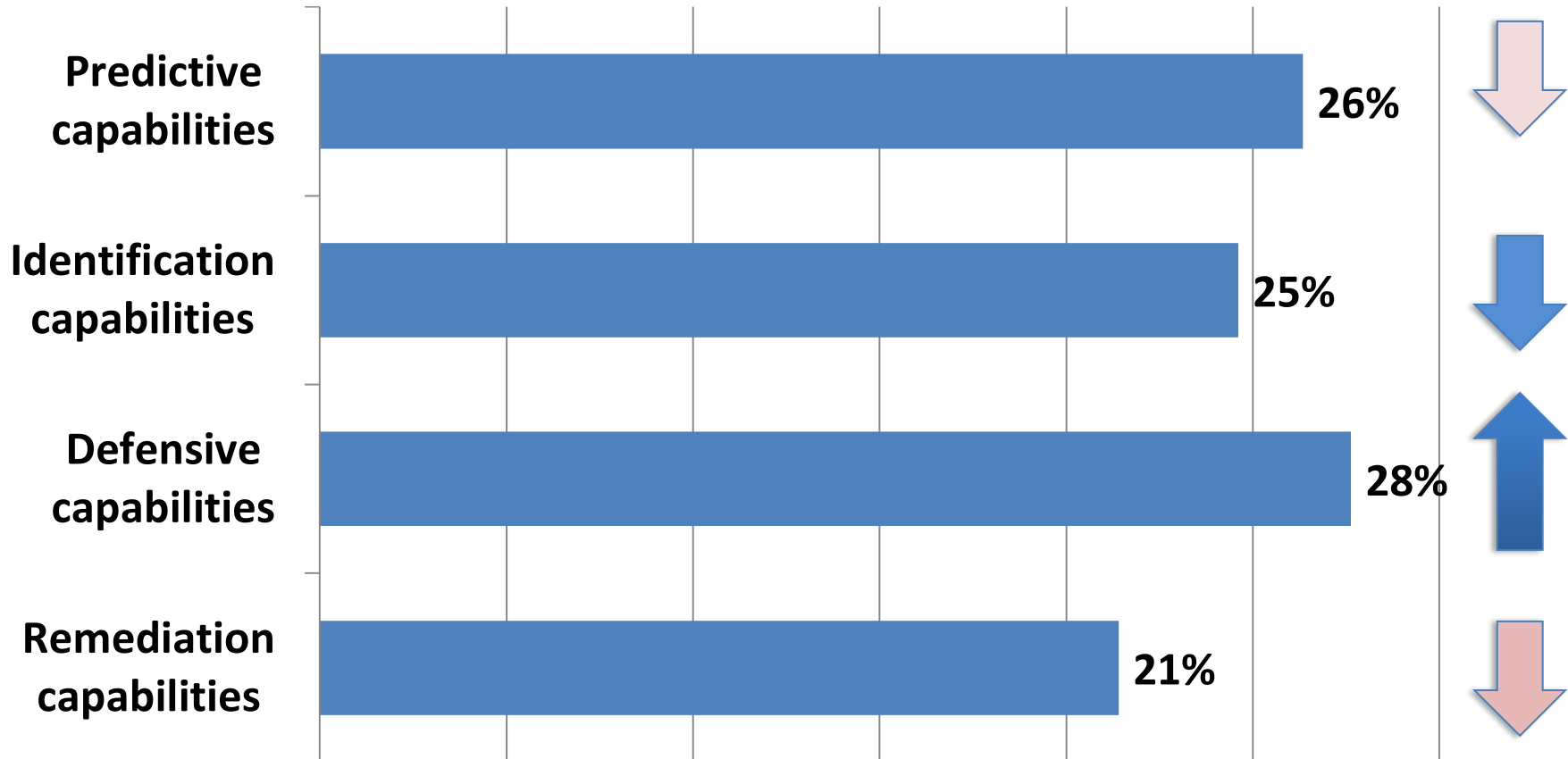
Common 3rd Platform Security Technologies Unify Four Pillars



	Cloud	Mobile	Social Networks	Big Data (Threat Intelligence)
	Early detection & mitigation of targeted, unknown attacks. Granular logging and policy enforcement of internal and external regulations.			
Predictive	Privileged Access Management, Federated Identity, Multi-factor Authentication, Data Protection, & Vulnerability Assessment	Strong Authentication, Data Protection, Web/Messaging SaaS, & SSO	Data Loss prevention with data protection, global regulatory policy monitoring, & real-time policy enforcement & education	Raw & analyzed threat feeds from multiple sources integrated with management consoles
Proactive	VPN, Single Sign-On, Encryption, & Strong Passwords	Mobile Device Management	Keyword-based monitoring & logging	Network monitoring and SIEM
Reactive	Access control	Device Password	Acceptable Use Policy	Signature-based detection

Source: IDC, 2014

Future Security Budget Changes



N = 303

Base=All Respondents

Note: Managed by IDC's Quantitative Research Group.; Data Not Weighted; Use caution when interpreting small sample sizes.

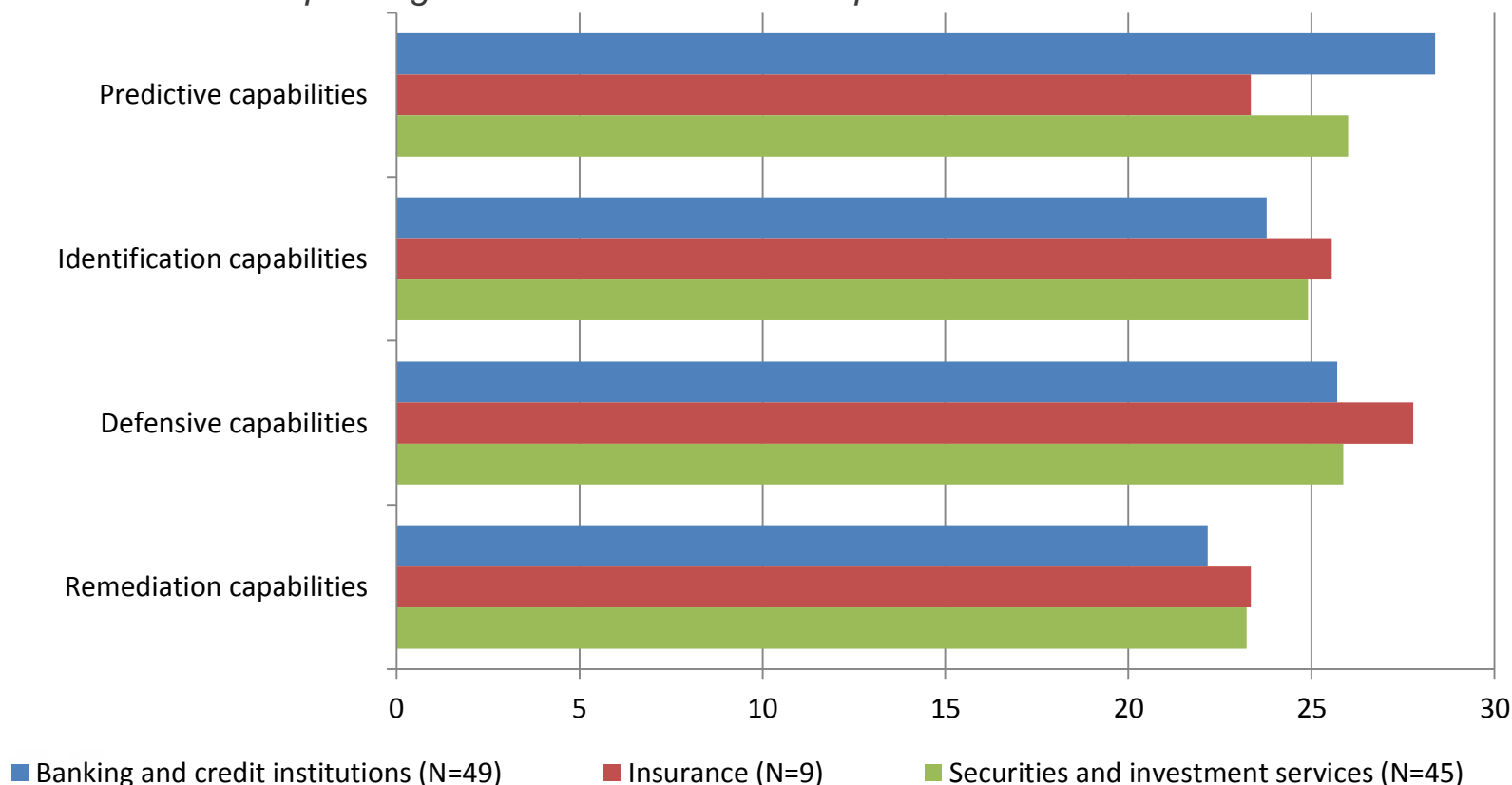
Source: IDC's Cyber Threat Survey, IDC, May, 2014

Financial Services Shifts

Predictive Capabilities Now Exceed Remediation Investments



When thinking about Cyber Threat spending strategies, how has your organization's spending been allocated to these capabilities in the future?



Source: IDC's Cyber Threat Survey, IDC, May, 2014

Threat Intelligence Market



- Focus: Predictive threats detection
- Delivery: Raw data, analysis of raw data raw, distillation of existing data, remediation
- Customers: Internal, Quid pro Quo, External
- Future: Specialized by vertical, geography, platform, and malware.

Source: IDC, 2014

3rd Platform Trends for 2015



Almost 50% of cloud security will be delivered by the cloud to protect the cloud

Big Data-driven threat intelligence security will be 10 times more valuable than traditional technologies

Mobile security includes identity, 2-factor authentication, DLP, encryption, and mobile payments

Cyber weapons becomes a growth business to the detriment of the security community

Social Controls combine security, marketing, and Return on Investment

20% of security markets will shift from protecting people and their devices to “things” that have no users

Privacy moves from casual discussions to black book laws

Analytics becomes the differentiator in threat intelligence excellence

Source: IDC, 2014

Key Attributes for Successful 3rd Platform Security



- Design for common infrastructure, processes, technologies, products, and services that unite all four pillars of the 3rd platform
- Align business & security goals for a common POSTIVE outcome
- Continually run discovery and vulnerability management against all assets
- Regularly, test and update incident response processes
- Monitor all users (e.g., employees, partners, suppliers, resellers, customers, etc.) across all systems for anomalies, threats, and compliance
- Remember that security is a continuous compromise between use cases, shared risk, business requirements, user experience, and financial benefits across a broad spectrum of stakeholders
- Migrate security strategies from reactive to proactive and predictive

Source: IDC, 2014



Thanks!