

# Gartner Security & Risk Management Summit 2017

18 – 19 September / London, UK / [gartner.com/eu/security](http://gartner.com/eu/security)



## Event Summary


To securely enable digital business initiatives in a world of advanced, targeted attacks; security and risk management leaders must adopt a continuous adaptive risk and trust assessment strategic approach. Allowing real-time, risk and trust-based decision making with adaptive responses.

At the Gartner Security & Risk Management Summit 2017 in London, UK, we highlighted discussions of analytics/machine-learning tools, the impact of cloud on security segment dynamics and the firewall space, endpoints, and emerging segments, such as deception.

In the opening keynote, **'Manage Risk, Built Trust and Embrace Change by Becoming Adaptive Everywhere'**, Gartner analysts Mario de Boer, Ramon Krikken and Neil MacDonald introduced a new charter for information security. One that will transform all areas of information security moving forward. Building on Gartner's Adaptive Security Architecture vision, this keynote extended the

ability and need to be continuously adaptive to all disciplines of information security. The strategic **CARTA** (continuous adaptive risk and trust assessment) approach is the only way to balance the rapidly changing requirements of digital business with the need to protect the organization from advanced attacks, while maintaining acceptable levels of risk and compliance. Gartner explored the future vision and using real-world examples on how this mindset applies to your information security and risk organization, processes and infrastructure.

**Gartner predicts by 2020, 25% of new digital business initiatives will adopt a CARTA strategic approach.**



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## Highlights from the event:

- Digital business risk and digital business opportunity are fundamentally intertwined; you can't have one without the other. **The key is continuously assessing and balancing both. We need security that is adaptive everywhere, to embrace the opportunity — and manage the risks.** In short, we need a CARTA strategic approach. CARTA is about preparing all systems and devices for interoperability with digital trust, and extending digital trust toward them.
- The No. 1 response to the question, “In your opinion, which technology will have the most potential to change your organization over the next five years?” was “Advanced Analytics,” with 81% of the respondents providing this response. **By 2020, investment in artificial intelligence/machine-learning-based tools for IT resilience orchestration automation will more than triple.**
- Analytics will be sprinkled across all of security. **By 2020, at least 60% of major CASB vendors and 25% of major SIEM and DLP vendors will incorporate advanced analytics and UEBA functionality into their products.** Also, vendors in the AST space are beginning to add machine-learning-based enhancements to their offerings.
- The firewall space is characterized by competing “platforms” that have been rolled out by the vendors, the additional competitive dynamics caused by workloads moving to the cloud, and the potential for incremental demand for firewalls that will be deployed for outbound Transport Layer Security (TLS) inspection. **Gartner predicts that more firewalls will be deployed to deal with decryption/re-encryption, so this can be a source of near-term incremental demand for firewall vendors.**
- **Cloud-based security services will be worth \$9 billion in 2020, and will grow at a five-year compound annual growth rate (CAGR) of 19.1%.** Other cloud-based security services (where we find services such as web application firewall [WAF] and endpoint detection and response [EDR]) is the fastest-growth segment, with a five-year CAGR through 2020 estimated at 25%. SIEM is a close second, with an estimated growth of 24% through 2020.
- PAM tools should be used to manage privileged, service and application-to-application accounts on IaaS instances and, thus, should see demand from the growth of IaaS.
- Gartner believes that fully featured CASB platforms will continue to be a distinct market. However, **Gartner predicts that, in 2020, 25% of new firewalls sold will include CASB features or integration with cloud-based CASB, up from less than 1% today.**
- In 2020, the \$1.5 billion EDR market value will be additive to the \$3.6 billion EPP market value, bringing **the combined endpoint security market will be an estimated total of \$5.1 billion in 2020.**

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