

The logo features the word "FORRESTER" in a white, serif font, centered within a dark green oval. The oval is set against a dark blue background with faint, light blue wavy lines that create a sense of motion or depth.

FORRESTER®

# State of Information Security

**Khalid Kark**  
Principal Analyst  
Forrester Research

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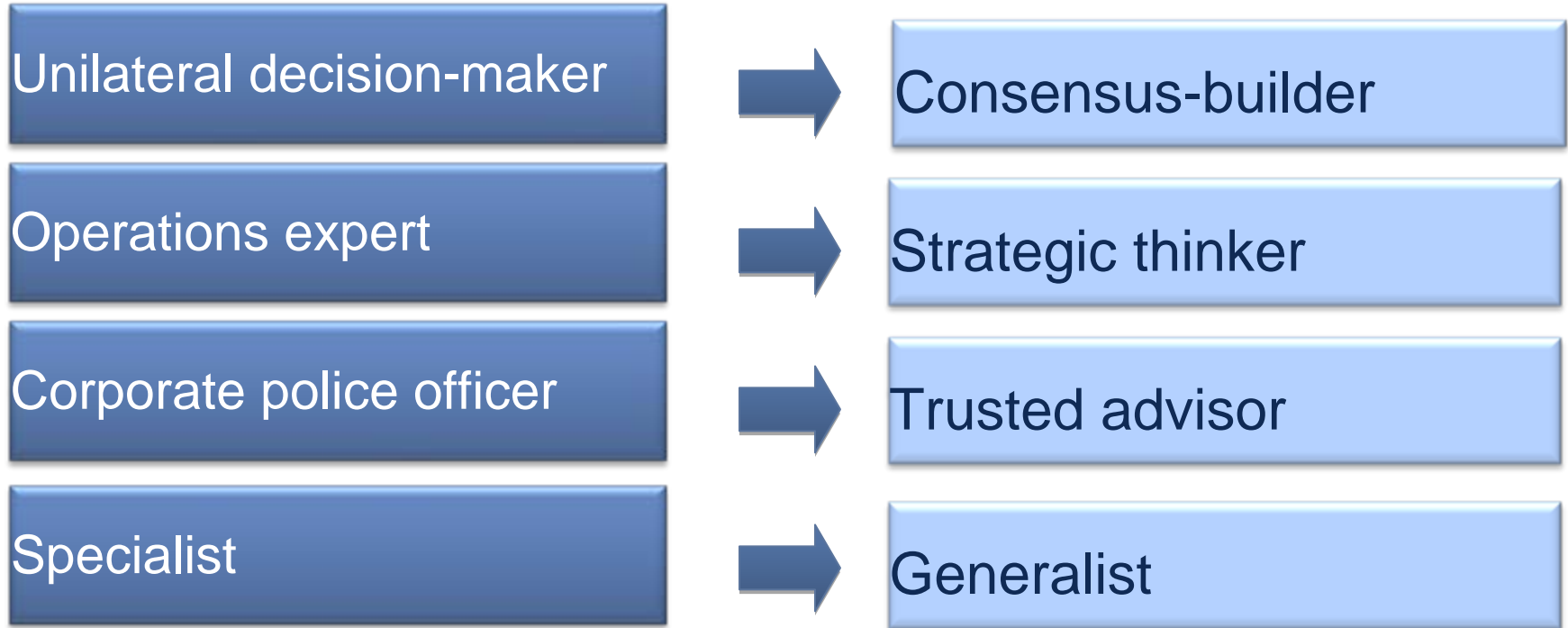
# Agenda

- **Change in the role of information security**
- Current priorities and challenges
- Canadian Market
- Conclusions and recommendations

# Belief system



# Personality traits

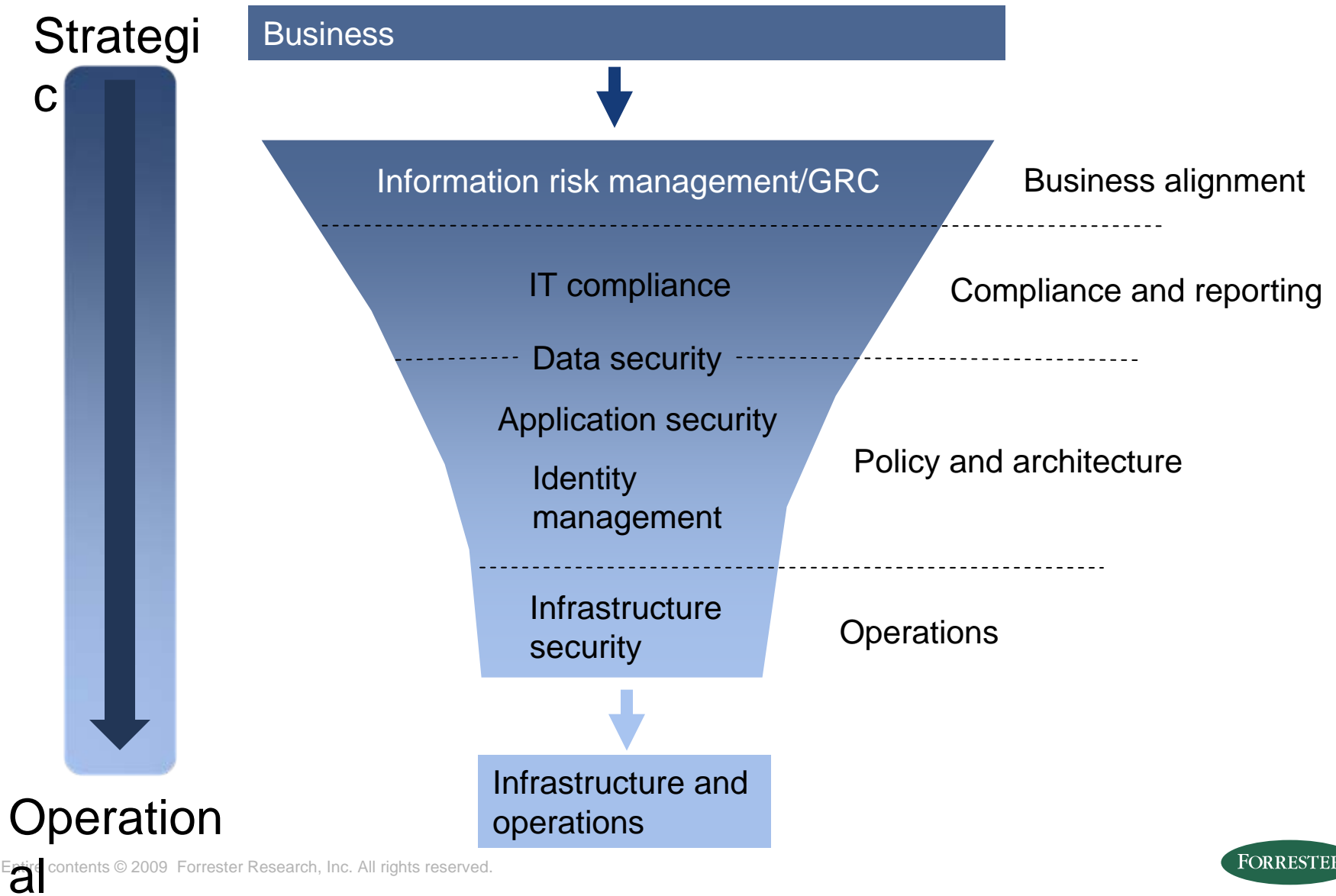


# You're expected to be a jack of all trades

- Business expectations
  - Mobility and access
  - New business models
- Technology changes
  - Web 2.0
  - Virtualization
- Economic conditions
  - Budgets
  - Prioritization and efficiency

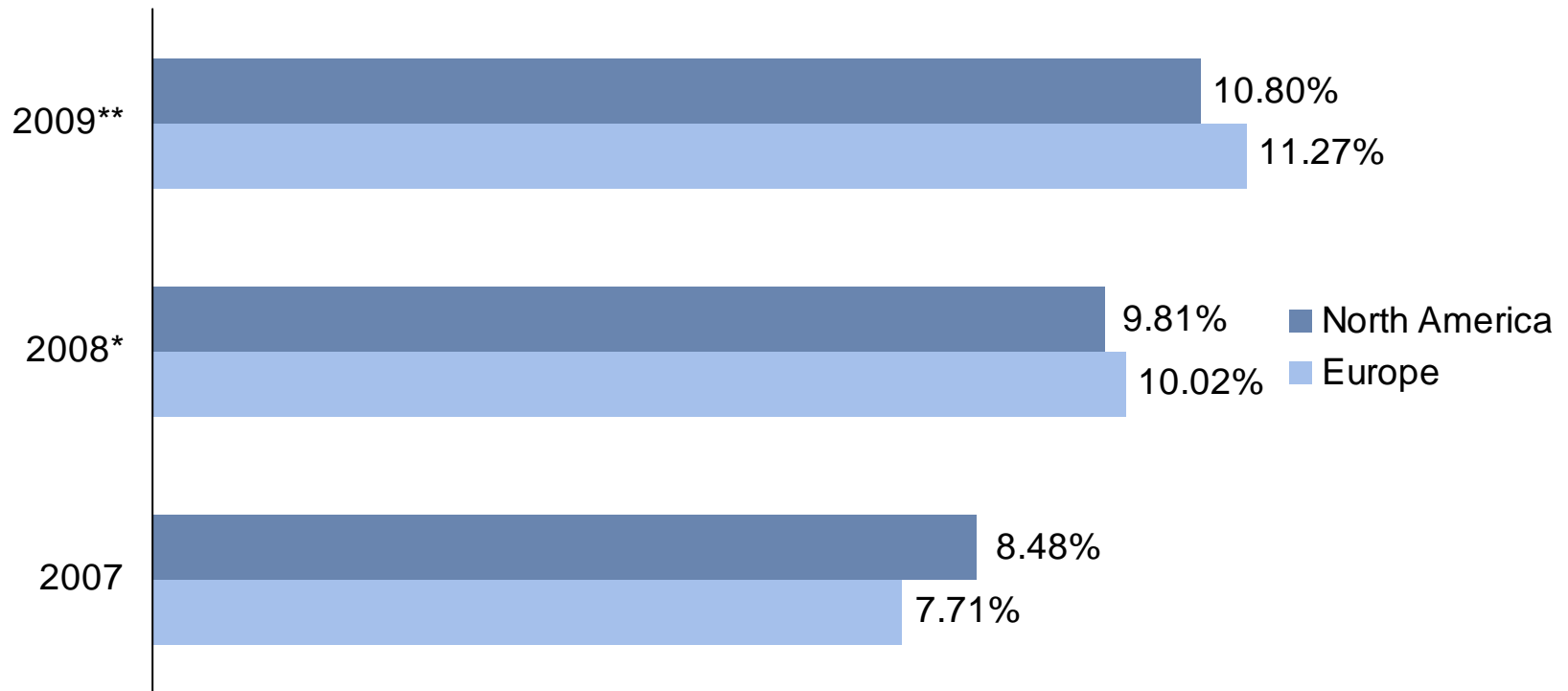


# Operationalize security



# Overall spending on security increasing steadily

“What percent of your company’s IT operating budget will be devoted to IT security?”

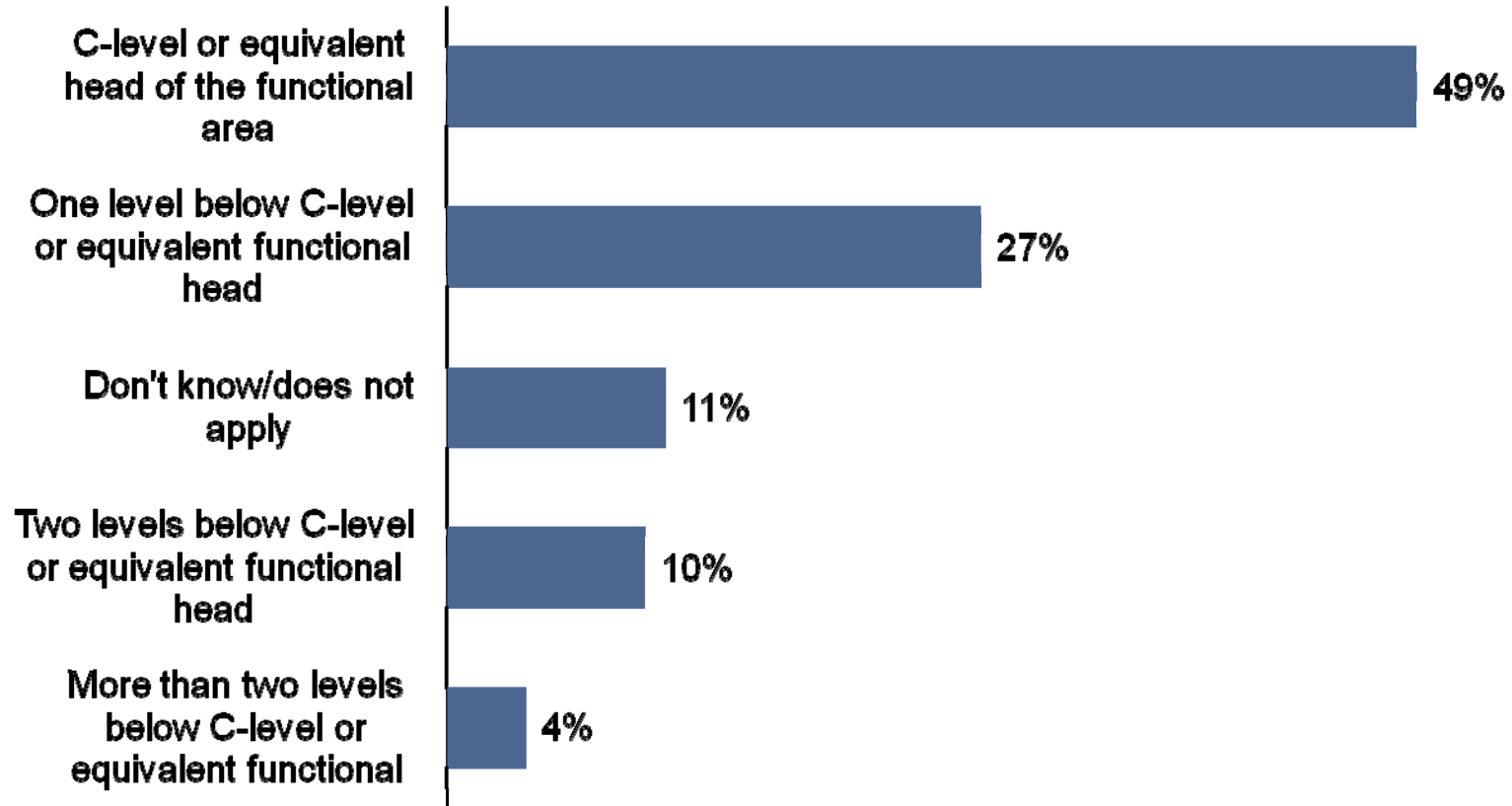


# Security remains top of IT agenda

	2005*	2006†	2007‡	2008
Security	57%	62%	48%	50%
Business continuity	53%	52%	48%	48%
Infrastructure consolidation	53%	56%	48%	48%

# Security is getting the visibility it has long sought

“To which level within the organization does the Chief Information Security Officer (CISO) or equivalent directly report?”



Base: 953 North American and European enterprise decision-makers responsible for IT security

Source: Enterprise And SMB Security Survey, North America And Europe, Q3 2009

# Why security and risk managers are turning to service providers

## Complexity

Protecting increasingly complex environments while taking into account technology changes (virtualization, Web 2.0, etc.)

## Compliance

SOX, PCI, HIPAA, and standards (ISO 27001/27002)

## Competency

Finding the right skill-set to understand and respond to business challenges

## Cost

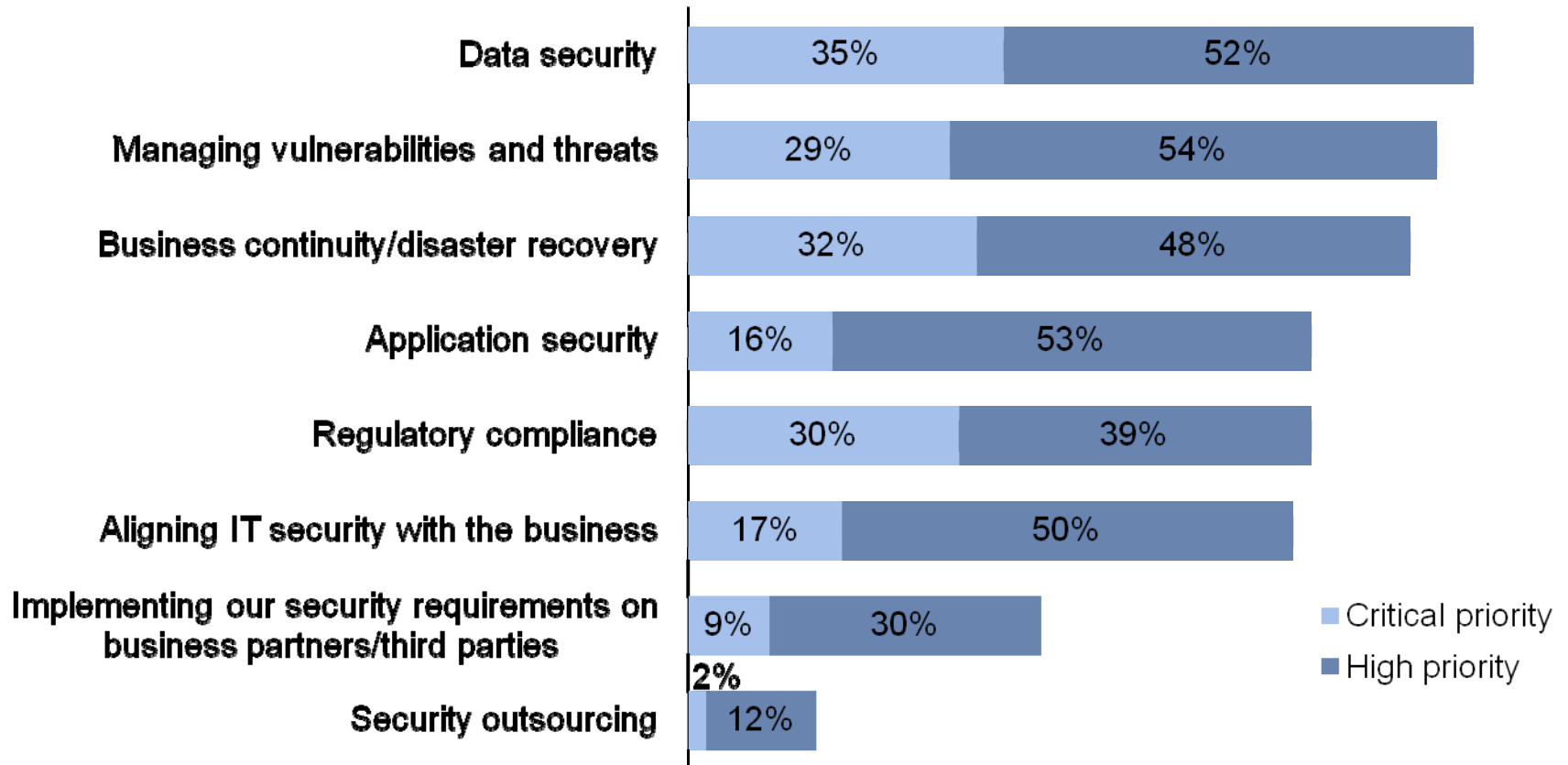
Creating efficiencies by employing existing resources more effectively (people, process, and technology)

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# Data and application security remain top priorities

“Which of the following initiatives are likely to be your firm's/organization's top IT security priorities over the next 12 months?”

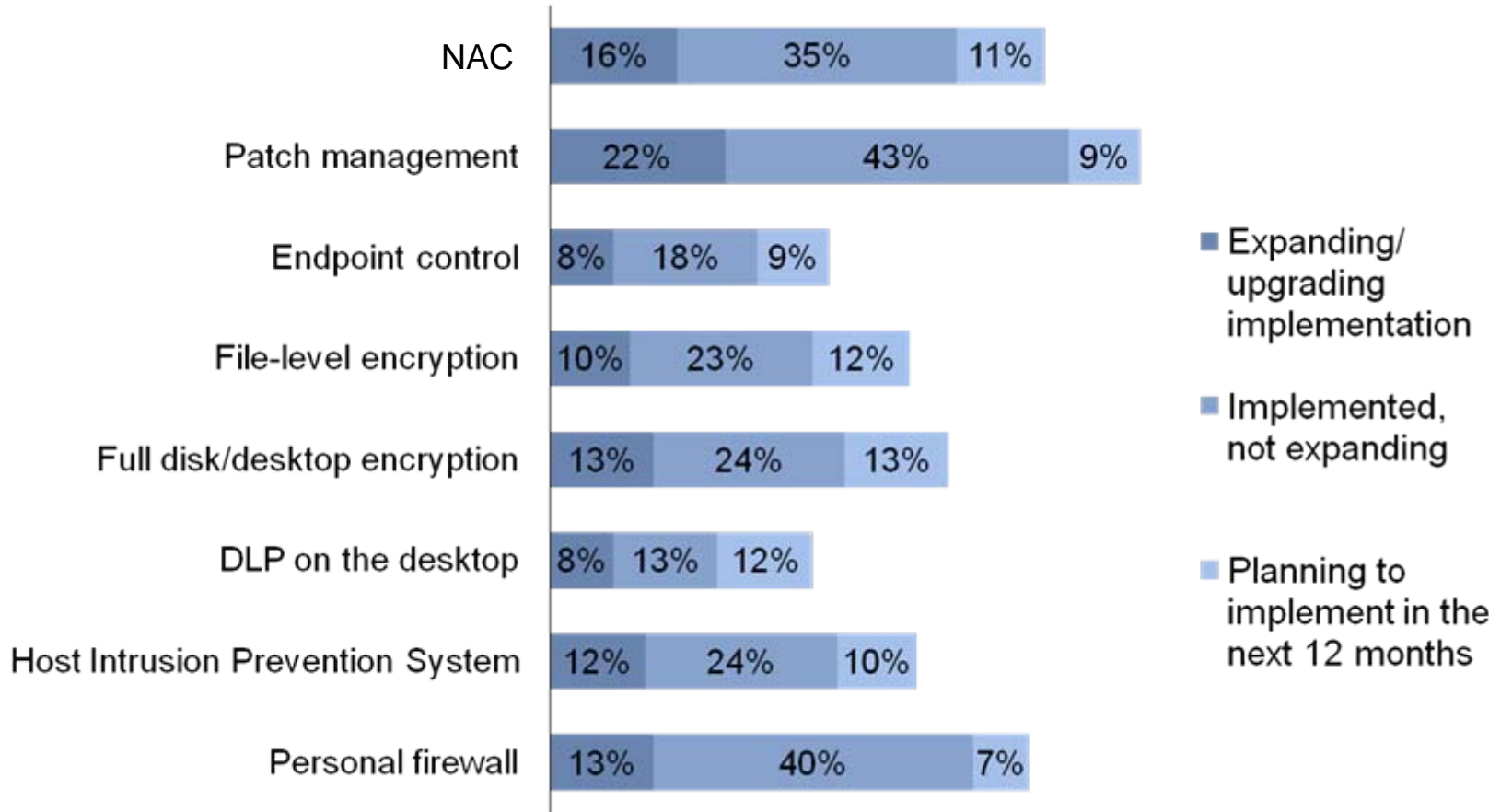


Base: 1,959 North American and European enterprise and SMB decision-makers responsible for IT security

Source: Enterprise And SMB Security Survey, North America And Europe, Q3 2009

# Client security attention also shifting to data security

“What is your organization’s interest in adopting each of the following client security technologies?”

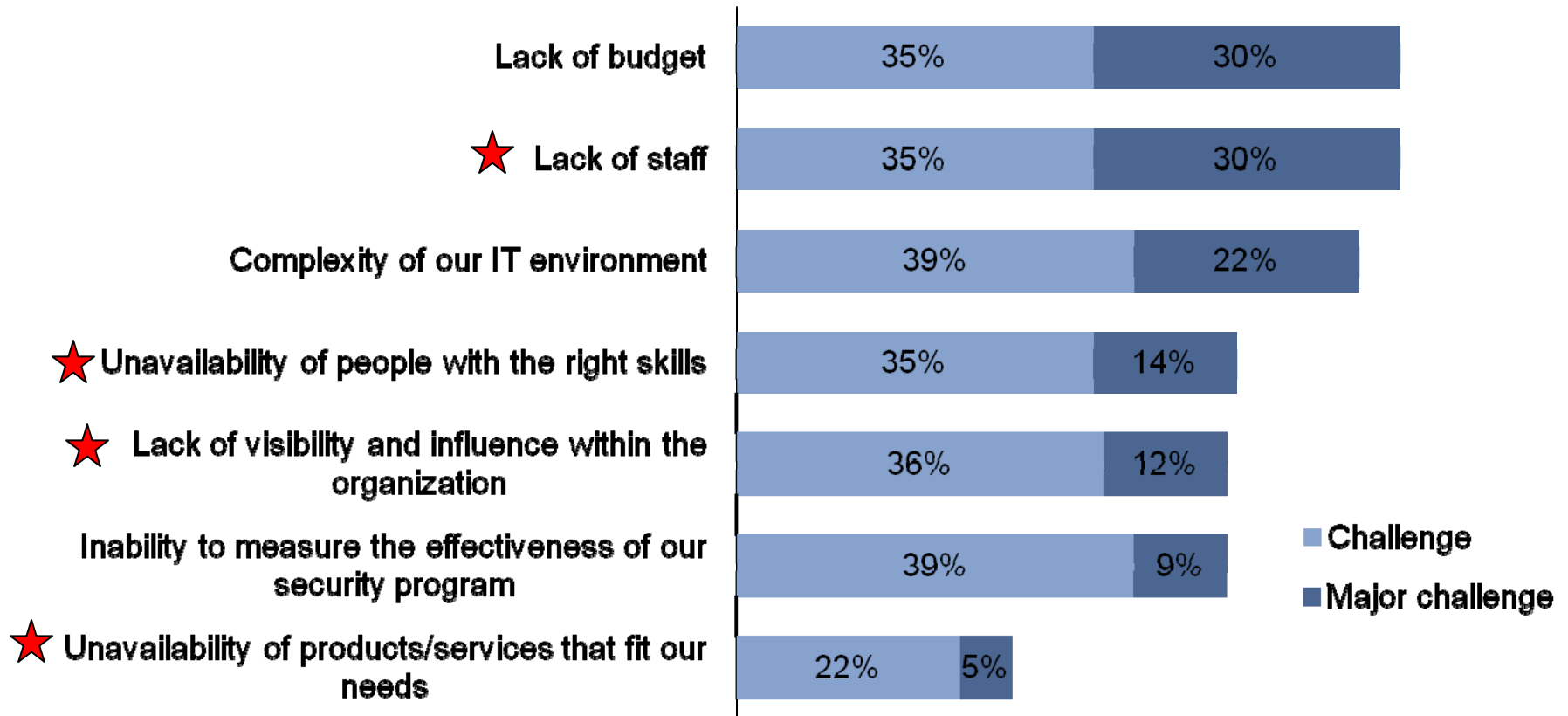


Base: 1,009 North American and European enterprise and SMB decision-makers

Source: Enterprise And SMB Security Survey, North America And Europe, Q3 2009

# Prioritization, people issues dominate challenges

“Please rate the following IT security challenges in your firm.”

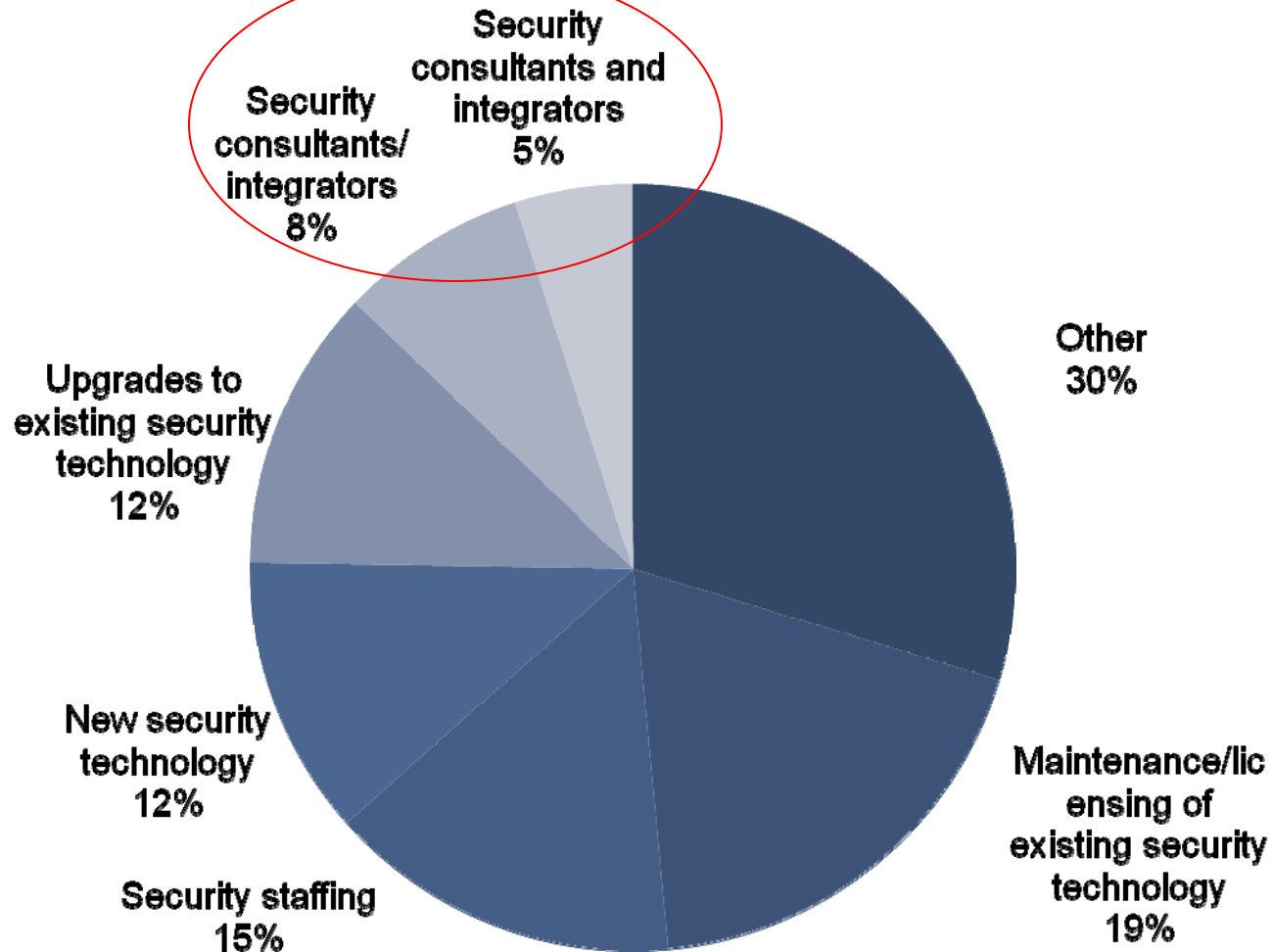


Base: 1,959 North American and European enterprise and SMB decision-makers responsible for IT security

Source: Enterprise And SMB Security Survey, North America And Europe, Q3 2009

# Services spend is significant and increasing

“In 2009, what percentage of your security budget will be spent on the following categories?”

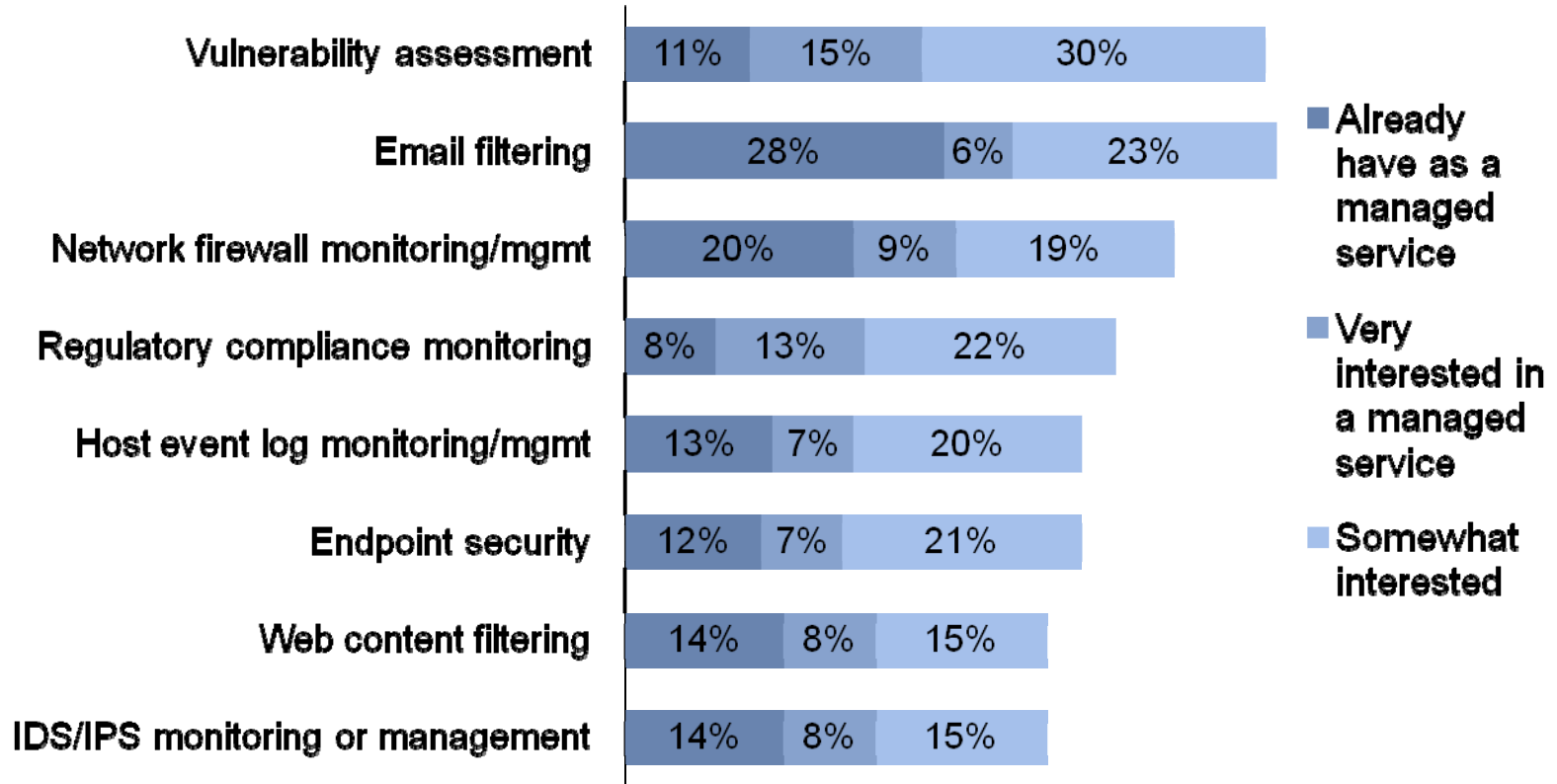


Base: 1,281 North American and European enterprise and SMB decision-makers responsible for IT security

Source: Enterprise And SMB Security Survey, North America And Europe, Q3 2009

# Managed security services become mainstream

How interested is your firm/organization in procuring the following as a managed service in the next 12 months?

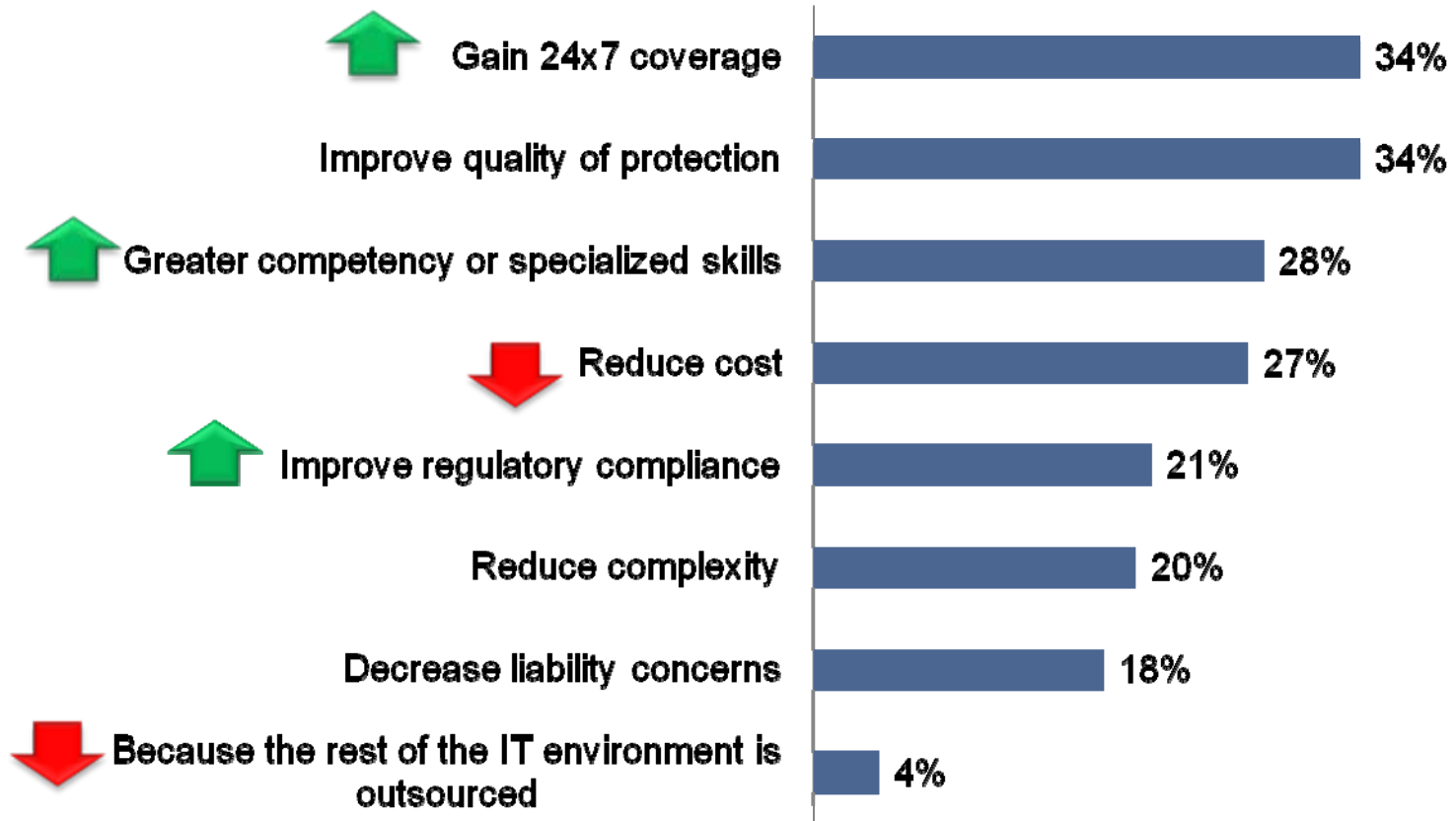


Base: 240 North American and European enterprise and SMB decision-makers

Source: Enterprise And SMB Security Survey, North America And Europe, Q3 2009

# Competency trumps cost for managed services

How important were the following in your firm's decision to adopt managed security services?  
(percentage of respondents who answered "very important")



Base: 1,214 North American and European enterprise and SMB IT security decision-makers

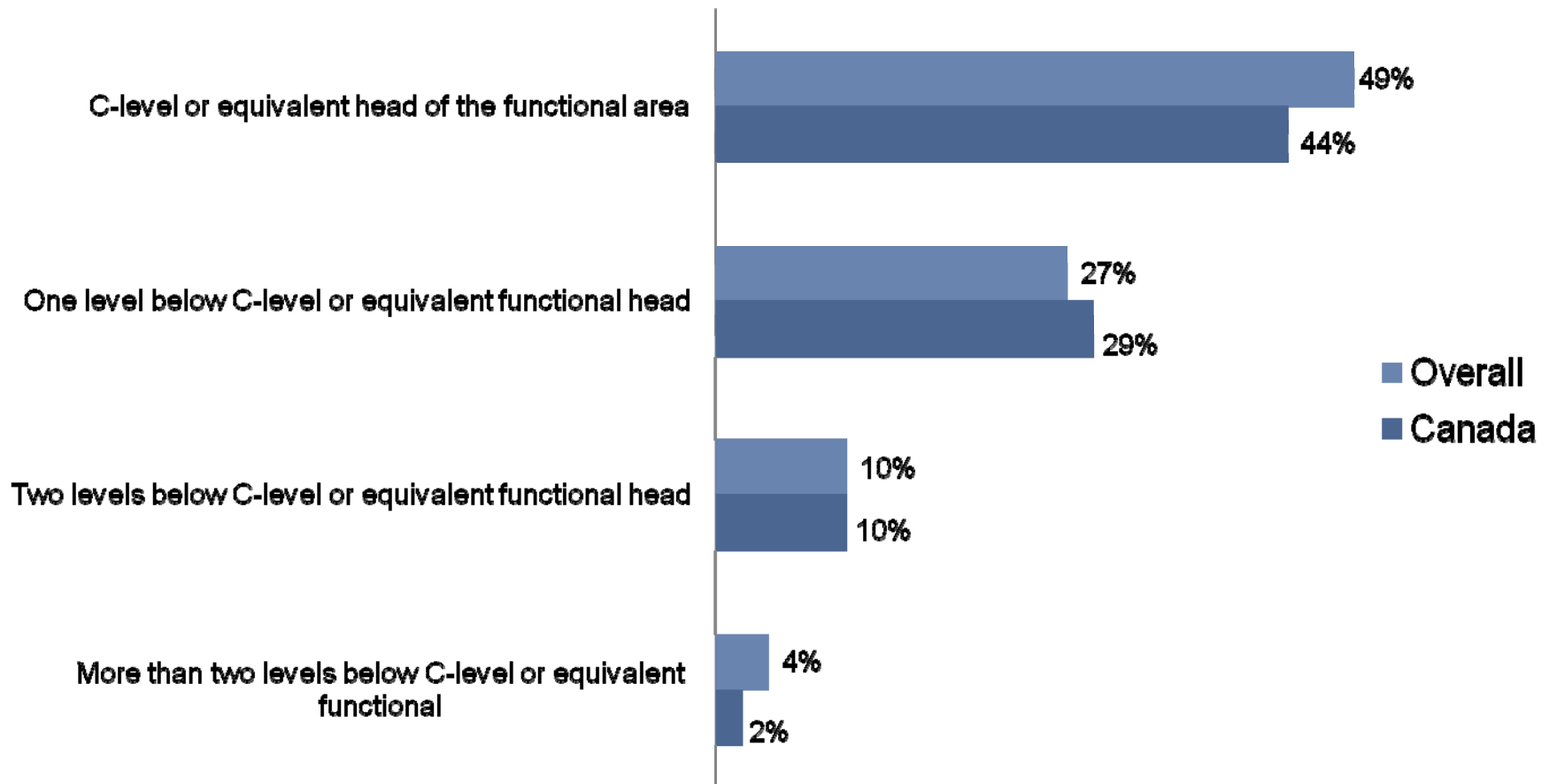
Source: Enterprise And SMB Security Survey, North America And Europe, Q3 2009

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# Canadian CISOs report lower

To which level within the organization does the Chief Information Security Officer (CISO) or equivalent directly report?

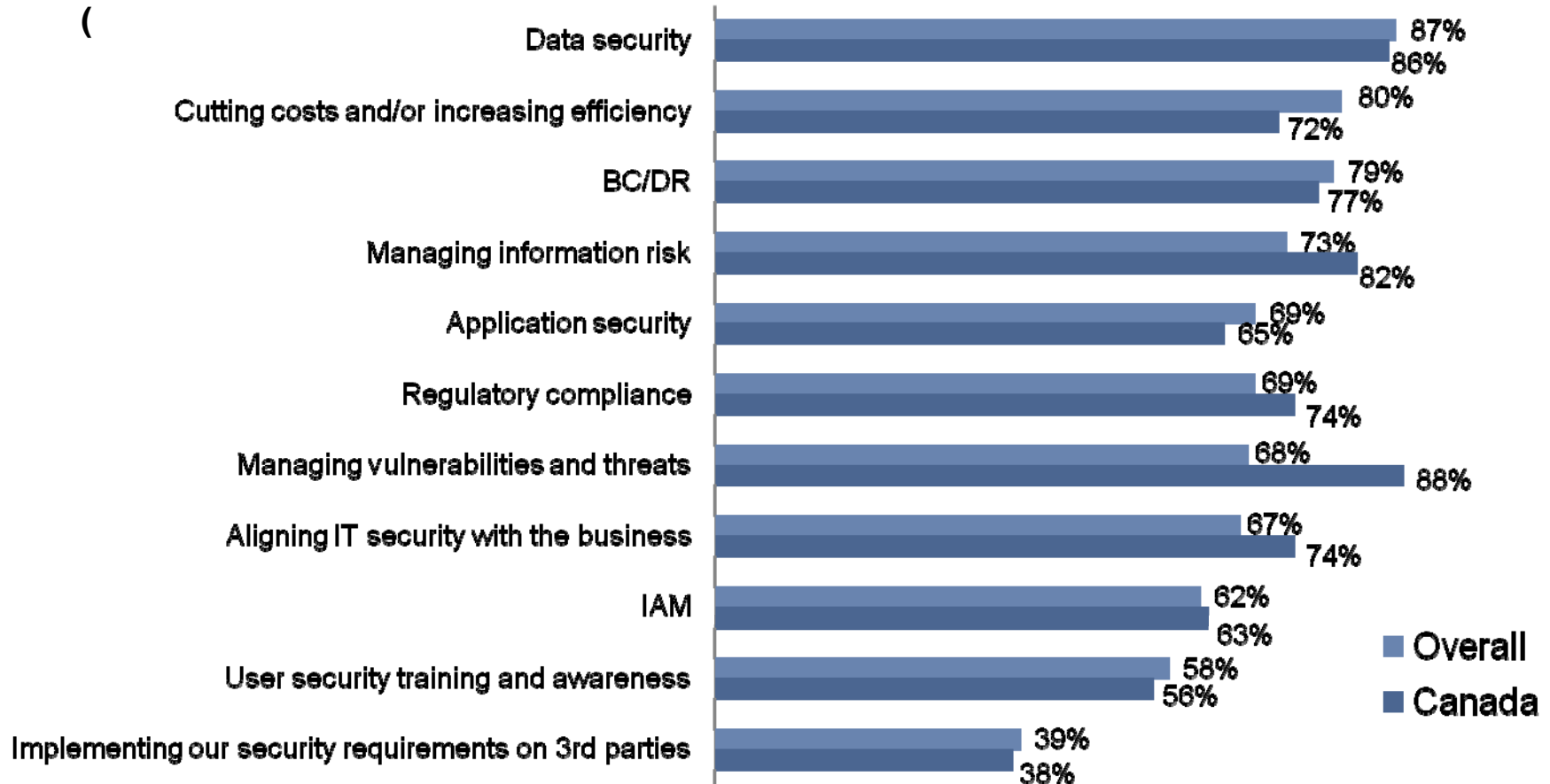


Base: 953 security decision-makers at North American and European enterprises

Source: Enterprise And SMB Security Survey, North America And Europe, Q3 2009

# Canadians focus on risk and vulnerabilities

Which of the following initiatives are likely to be your firm's/organization's top IT security priorities over the next 12 months?

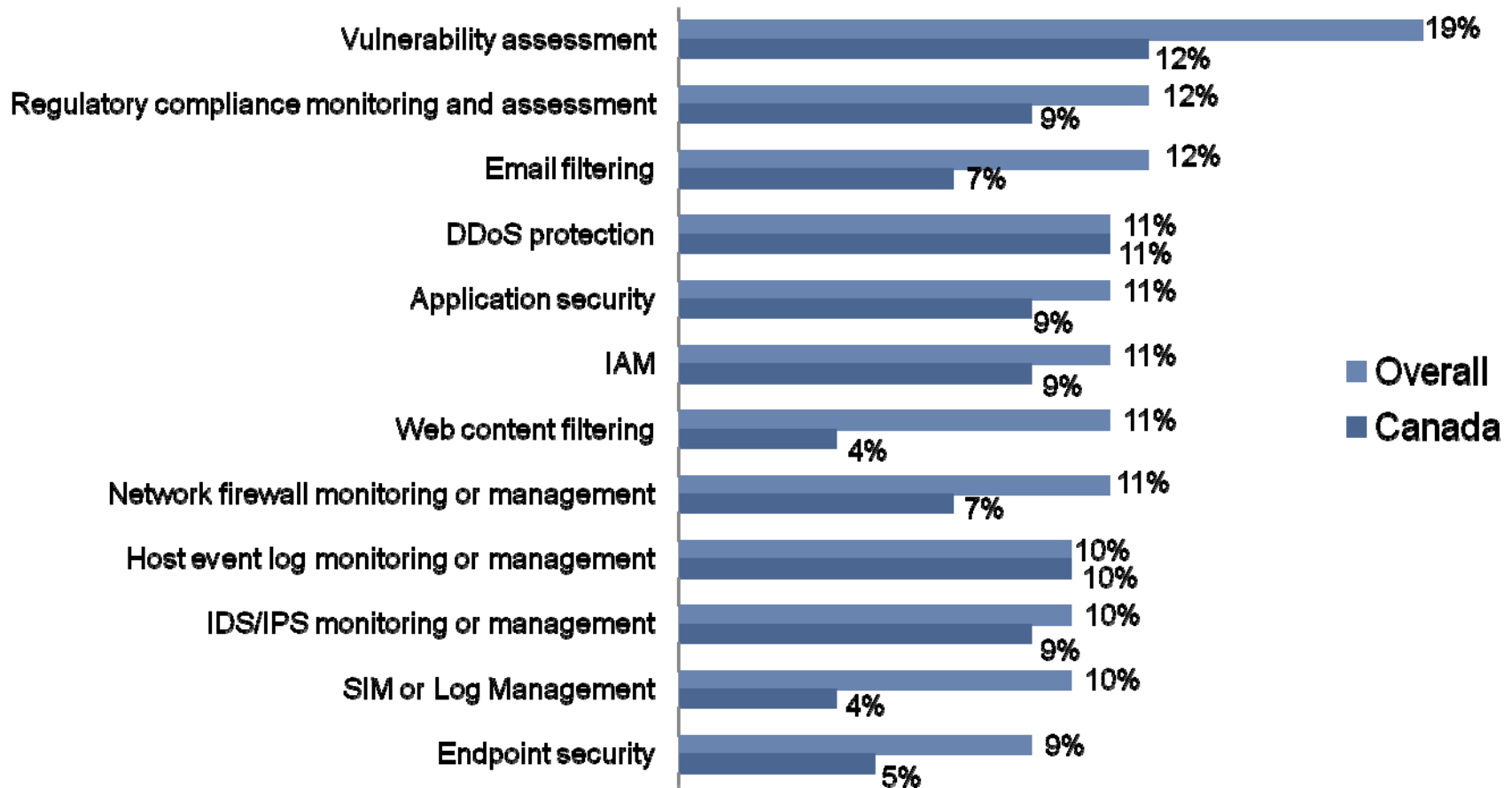


Base: 1,959 security decision-makers at North American and European companies

Source: Enterprise And SMB Security Survey, North America And Europe, Q3 2009

# Canadian orgs. less likely to outsource

How interested is your firm/organization in procuring the following as a **MANAGED SERVICE** in the next 12 months?



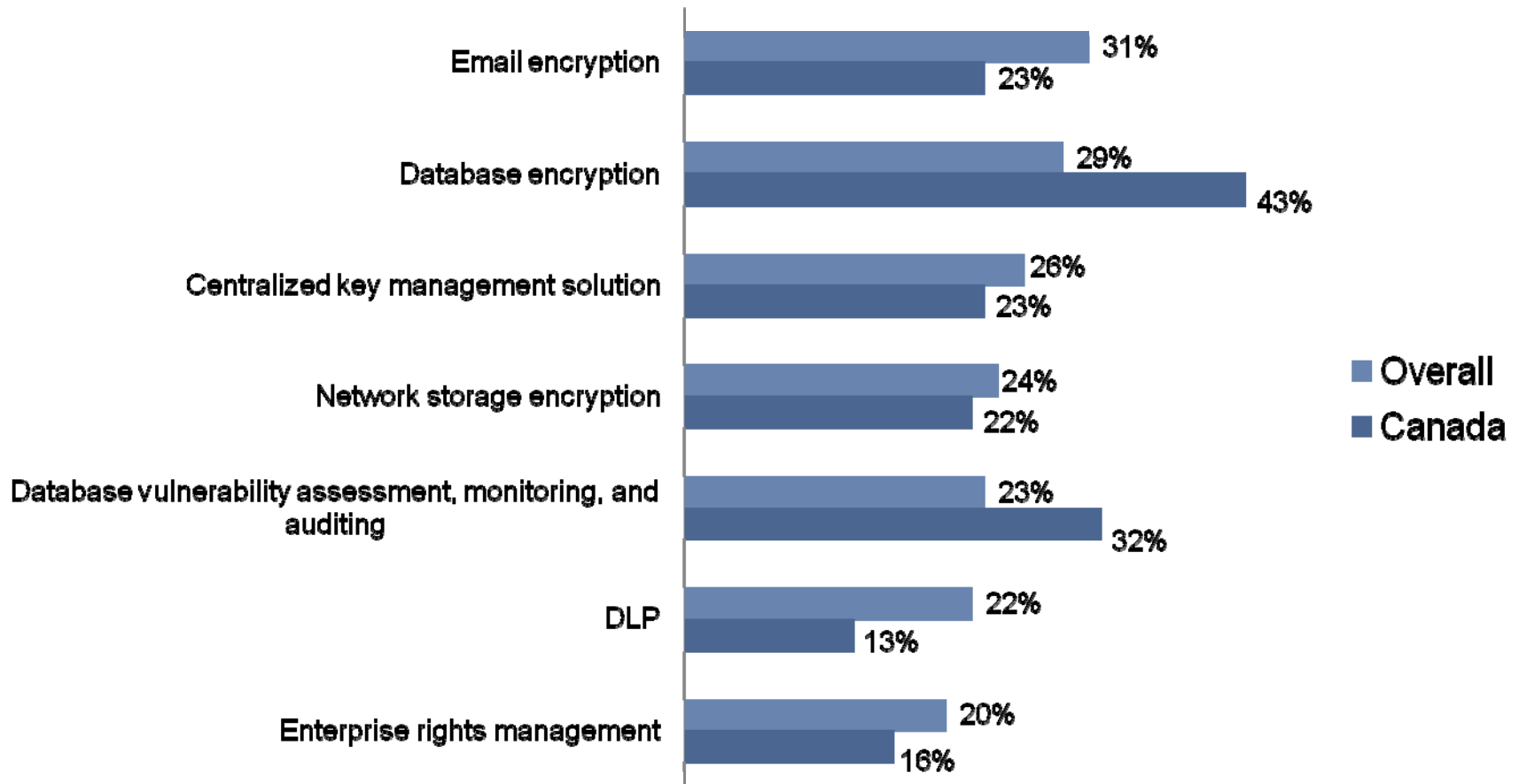
Base: 1,959 security decision-makers at North American and European companies

Source: Enterprise And SMB Security Survey, North America And Europe, Q3 2009

# Canadian enterprises lag behind in DLP

What are your firm's plans to adopt the following data security technologies?

(respondents who have already implemented or are planning to implement in the next 12 months)

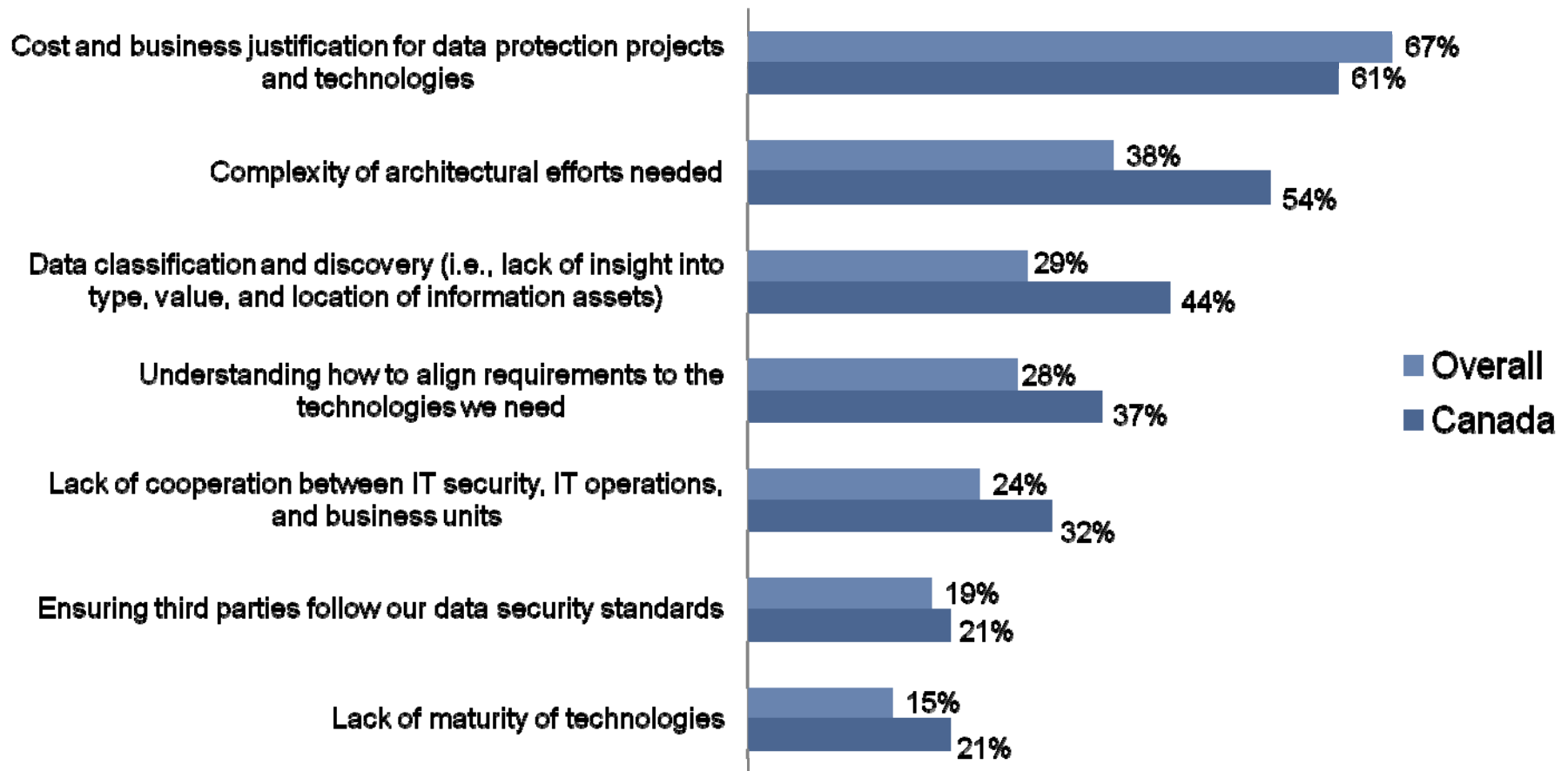


Base: 1,959 security decision-makers at North American and European companies

Source: Enterprise And SMB Security Survey, North America And Europe, Q3 2009

# More Canadian firms face significant challenges

What are your firm's biggest challenges in implementing data security technologies?



Base: 1,959 security decision-makers at North American and European companies

Source: Enterprise And SMB Security Survey, North America And Europe, Q3 2009

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# Conclusions

- The role of the security department has changed significantly and we have to change or we'll be left behind
- Securing applications/data and employing services where appropriate will be the key to your success
- Canadian market is maturing fast but needs to embrace services more.
- Canadian firms must bring their CISOs up in the organization

# Recommendation: Balance the tradeoffs



Operations tasks versus strategic direction

Cost efficiencies versus proactive risk and mgmt.

Best practice versus business value

Quick fix approach versus long winded process

No news is good news versus information overload

# Recommendation: It's all about people

Be creative in influencing the culture.

Create a business security outreach program.

- Identify “security champions.”
- Embed security personnel in business.

Do not underestimate the power of politics & culture.

Ensure accountability and transparency at all levels.

Concentrate on “who” not “how.”

# Recommendation: Use Technology appropriately

Augment technology with people and process

Develop a strategy for application security

Have the top five lists based on risk

DLP and SIM tools can give you visibility

Look for easier integration and ease of use

# Thank you

Khalid Kark

+1 617.613.6433

kkark@forrester.com

www.forrester.com