

IDC MARKET ANALYSIS: INFORMATION ASSURANCE IN THE UK (APRIL 2006)

SUMMARY REPORT

Introduction

We commissioned IDC, a leading industry analysis and market research firm, to write a report on the UK information assurance (IA) market. The report was written in April 2006 by Lionel Lamy. This summarises the main findings.

Some Good Quotes

- "Information assurance goes beyond security services...information assurance is putting more emphasis on the strategic level of information security within the enterprise."
- "The market is moving away from point solutions and in the long term will be dominated by the more complex strategic solutions corresponding to information assurance."
- "(Vistorm's) portfolio of information assurance business solutions addresses the market's requirement for information assurance...Vistorm has the right blend of skill sets that allows it to deliver these complex solutions."

How Does IDC Define Information Assurance?

Information assurance is closely linked to the IT security services market and both terms are used interchangeably. However, IA goes beyond security services. IA takes a top-down approach to IT security and puts more emphasis on the strategic level of information within the enterprise. As such, it encompasses both the technical elements of IT security (e.g. firewall, anti-virus) and the risk management aspects.

Main Points

IT security is now viewed as a business issue, not purely a technical problem. This is why we're seeing IA starting to emerge.

IA is different from traditional IT security services. It offers a more holistic, enterprise-wide solution to the issue of IT security.

The UK IA market is substantial. It is forecast to grow from \$1.28bn in 2005, to \$2.46bn in 2010 (CAGR of 13.9%).

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This healthy growth is being fuelled by several main factors:

- Buyers are thinking more strategically. They have tried and tested the point solution first and found its limitations. As the market matures, UK buyers are increasingly thinking about security in a more holistic way.
- Security has been top of the CIO's agenda since 2004 according to IDC surveys in the UK and Europe. This is confirmed by numerous conversations with UK CIOs.
- Actual security threats as well as the fear of such threats are pushing the requirement for information security and IA services.
- Regulation compliance. Increasingly complex regulations are pushing the market towards service providers for help. Companies are seeking external help to ensure they understand and meet the demands of regulatory compliance.

The main inhibitor to the development of IA is the current lack of knowledge within the market. Many enterprises don't have sufficient information on which to make a decision. A secondary inhibitor is the reluctance of companies to seek external help because it means admitting they have a problem.

What IDC Says About Vistorm

Vistorm is a UK company focused on IT security matters. The company provides technology as well as services within the broader IA market.

The company is a business-issue led security and IA niche player. Vistorm has invested a lot in a specific IA platform - developing intellectual property that allows them to deliver insights and guidance to their clients.

Vistorm's vision is to be the "first choice provider of Business Information Assurance Services to the UK Market." The company wants to become "renowned for delivering cost-effective, high integrity information architectures and service platforms to our clients."

Vistorm's portfolio has been strengthened within the past 24 months, to reflect the changes that the company has witnessed within the market.

Vistorm's goal is to not only recommend the best possible IA roadmap to their clients but also to deliver on this roadmap – from implementation to on going management of the client's information security issues. Their portfolio of IA business solutions addresses the market's requirement for IA and enables them to offer relevant project services. Vistorm has the right blend of skill sets that allows them to deliver these complex solutions.

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