



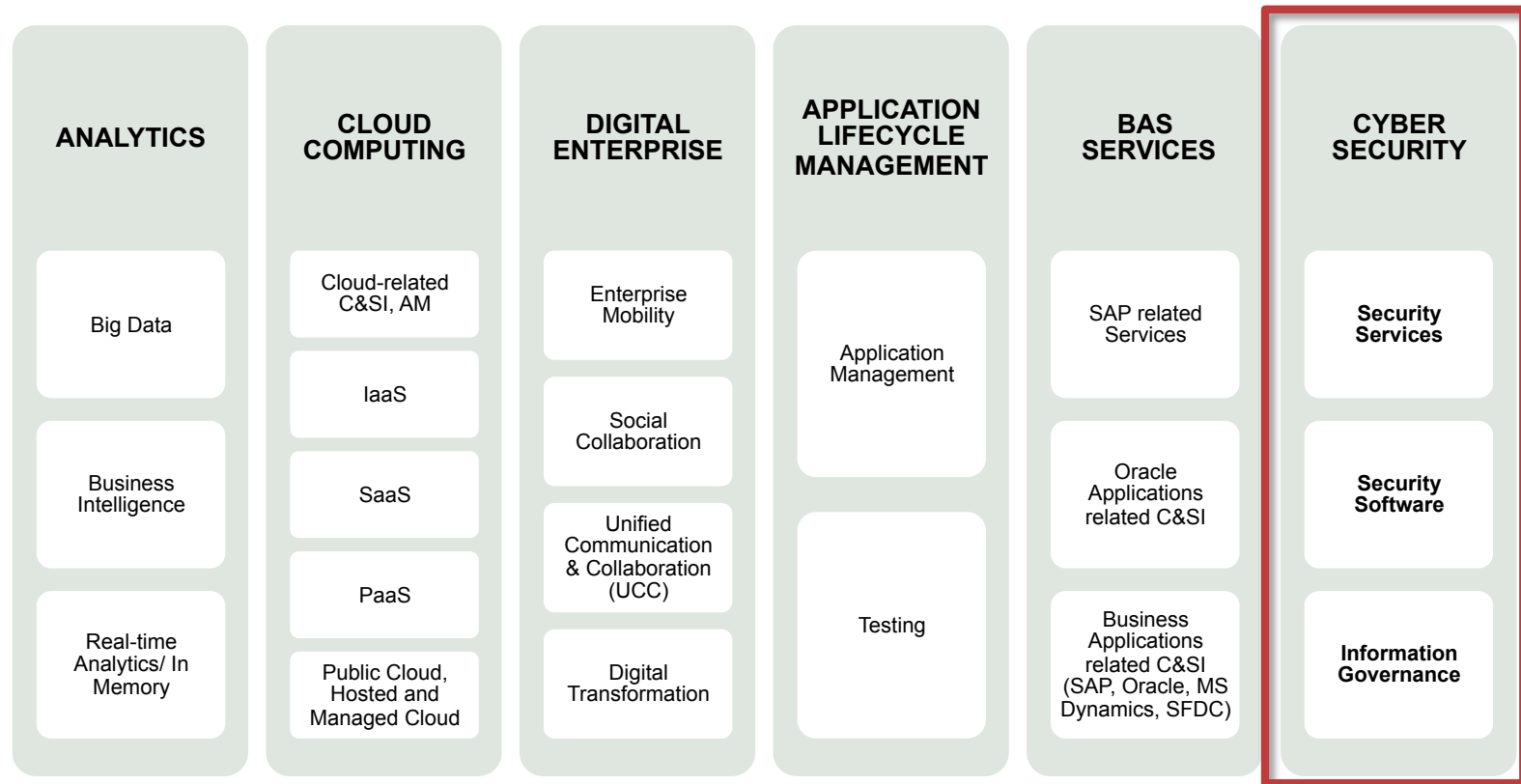
Pierre Audoin Consultants

PAC Research Cluster “Cyber Security”

www.pac-online.com/cyber-security

PAC's research on game-changing topics

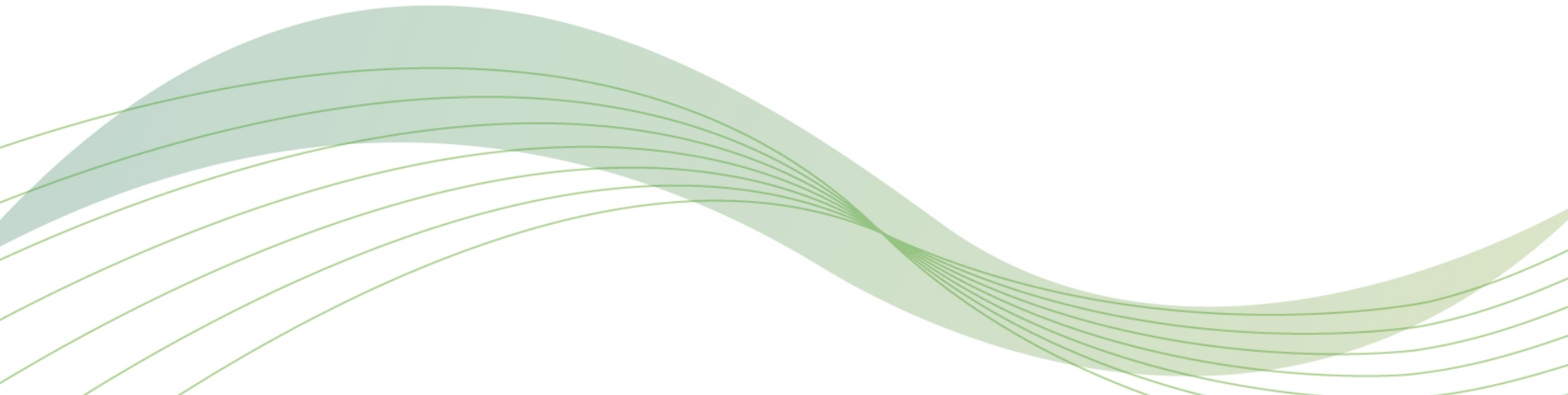
PAC's analyses of selected fast-growing software & IT services market segments and game-changing hot topics provide a multi-local view on key growth markets and current trends.



For each of our core research clusters, we publish comprehensive reports on the market and its players as well as detailed market figures and vendor rankings – covering 31 countries, six regions and the global market.

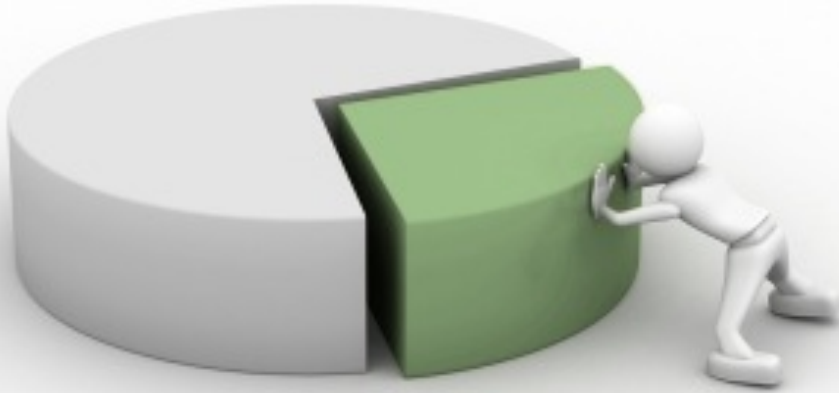


Cyber Security: SITSI[®] Research Cluster



SITSI® cluster “Cyber Security”

Market volumes & growth rates (2 years back, 4-year forecast)	MARKET FIGURES & FORECASTS*	MARKET REPORTS	Local & global insight reports (20-50 pages) based on PAC's opinion-driven analysis & 5-year trend outlook
	IT security by segments <ul style="list-style-type: none"> ▪ Software & IT services <ul style="list-style-type: none"> • Infrastructure • Systems • Content • Governance ▪ Software ▪ Project services ▪ Outsourcing 	GLOBAL MARKET INSIGHT REPORTS <ul style="list-style-type: none"> ▪ Application and Content Security (2014) ▪ Asset Protection, Monitoring & Auditing (2014) ▪ IT Security Operation Centers (SOCs) (2013) ▪ IT Security & Mobility (2013) ▪ Cyber Security in the Public Sector (2013) ▪ IT Security (2012) 	
		LOCAL MARKET INSIGHT REPORTS <ul style="list-style-type: none"> ▪ IT Security C&SI (2014: France, Germany, UK) ▪ IT Security (2013: France) 	
Top 10-20 vendor rankings (based on global, regional or local revenue estimates)	VENDOR RANKINGS	VENDOR REPORTS	
	IT security (software & IT services) <ul style="list-style-type: none"> ▪ Worldwide ▪ EMEA ▪ France, Germany, UK 	<ul style="list-style-type: none"> ▪ IT Security C&SI Vendor Positioning in Europe (2014) 	
		* available for 31 countries, 6 regions and world	



IT Security: Custom-specific Projects (Extract)

Public sector projects

CUSTOMER	PROJECT
Alliance pour la Confiance Numérique - France	User survey, analysis and recommendations on the Digital Trust market
KfW - German government-owned development bank	Market analysis security operation centers in Europe
Department for Business, Innovation & Skills (BIS) - UK	Cyber security sector competitive analysis to tailor the future Cyber Security strategy of the British Government

Client-specific projects

CUSTOMER	PROJECT
Leading European IT services company	Competitive Analysis on “IT Security Services”
Multinational IT services provider	UK Public Sector Security. Research on market size, opportunities and competitive landscape.
Leading European IT services company	Study on cyber security consulting needs, knowledge and understanding of C-level executives across its core customer community
Multinational IT services company	Large research program in key European territories on IT Security
Multinational IT services provider	Pan-European Cyber Security Market Analysis. Detailed market and competitor analysis of the cyber security market in Western Europe
Global integrator of communications solutions	Custom IT Security study

PAC's Cyber Security team



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Security Definition & Segmentation

Security – definition of scope

PAC's Cyber Security research covers the whole IT Security market, including software, services and appliances.

Our functional segmentation of IT Security is:

- **Infrastructure:** perimeter security, including the network and end-points. Representative technologies include AV, firewalls, IPS, VPN, Secure Web Gateways, disk encryption, white listing & UTM.
- **Systems:** ID & Access Management and other technologies that control access to information and processes.
- **Content:** data-level security, including encryption, DLP, IRM/DRM and application-controlled security.
- **Governance:** auditing & monitoring, including SIEM, IPS/IDS, behaviour analysis, policies, information assurance/governance, Asset & Vulnerability management.

Security – Segmentation

Security Segmentation	Infrastructure	Systems	Content	Governance
IT security strategy	1	1	1	3
Risk management			1	3
Expertise/ architecture	2	2	2	2
Audit, intrusion tests, post-mortem	2	2	2	1
Regulation & certification controls	1	1	1	3
System integration	2	2	2	2
Managed security services	3	3	2	1
Recovery, continuity plans	3	3	2	1
SIEM	1	2	2	3
Asset & vulnerability management	2	2	1	2
End point security	3			2
Cryptology, signatures, PKI	1	1	3	1
DLP, DRM, archiving, filtering			3	2
Secure design/ application security			3	1
ID & access management		3	2	2
Network security	3	2		1
Threat management (anti-virus, firewall etc.)	3	1		1

0: not concerned

3: major concern

About us

From strategy to execution, PAC delivers focused and objective responses to the growth challenges of Information and Communication Technology (ICT) players.

Founded in 1976, PAC is a privately held research & consulting firm for the software and ICT services market.

PAC helps ICT vendors to optimize their strategies by providing quantitative and qualitative market analysis as well as operational and strategic consulting. We advise CIOs and financial investors in evaluating ICT vendors and solutions and support their investment decisions. Public institutions and organizations also rely on our key analyses to develop and shape their ICT policies.

For more information, please visit: www.pac-online.com

PAC's latest news: <http://blog.pac-online.com>

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