

Independent survey confirms strong trend for security consolidation among mid to large enterprises in Europe



In June 2009, Fortinet sponsored a survey conducted by independent market research company Vanson Bourne to assess the adoption of security consolidation among a total of 600 mid to large enterprises in major European economies.

Vanson Bourne survey - Key points

Strong trend for consolidation:

- 90% of respondents are likely to undertake a network security consolidation project in the next 12 months, two-thirds of them driven by the benefits of simplified management and reduced operating costs.
- Across the entire sample, only 6% of financial services businesses said “no” to a security consolidation project, compared to 15% in the manufacturing sector and 10% in retail, distribution and transportation.
- The most popular reason for pursuing a network security consolidation project (34%) was given as “simplified network security management.” Thirty-three percent stated “lower total cost of ownership/reduced OpEx” as the reason, while another 17% pointed to “tighter security.”

Lessons learned from the economic recession:

- The main ‘lesson learned’ (44%) by senior IT decision makers from their recessionary budget squeezes was their future wariness to rigid ‘per-user’ licensing models
- Manufacturing businesses were the most wary of rigid licensing models (52% stating it as the most important lesson) while financial services businesses were the strongest advocates (27%) for knowing they could “get more for less in future.”

Positive trend to virtualizing security:

- Eighty-one percent of the sample responded “yes,” based upon 94.5% in France, 88.5% in Germany, and 59.5% in the UK are currently considering virtualizing any of their individual IT security functions
- The financial services industry was the most positive sector, with a figure of 87% across the sample.

IDC validation on the trend for security consolidation

In its July 28, 2009 report, IDC confirmed that “with tighter IT budgets and greater uncertainty, unified security is the way forward for the majority of European organizations”.

Key points from the recent IDC report:

- Unified threat management (UTM) products are poised to overtake firewall/VPN solutions
- In recent months, IDC has seen a higher penetration of UTM appliances in enterprise environments. An evolution that can be attributed to technology advancements such as virtualization, the benefits these multifunction solutions offer, and the current economic climate.
- The main benefits of unified security are 1) reduced complexity, 2) combined protection against threats, 3) flexibility and scalability, 4) reduced costs.
- European organizations will now look at IT security from a financial point of view, paying for flexible services that can be turned on and off as necessary and looking for future scalability
- IDC has seen stronger interest in the European market for virtualization-based security in the past few quarters.

The complete report is available on IDC’s website: <http://www.idc.com/getdoc.jsp?containerId=lcUK21947109>

Vanson Bourne survey - Detailed results

A total of 600 senior IT-decision makers - 200 each from enterprises in the UK, France and Germany - were questioned by Vanson Bourne. For each of the three markets interviewed, all enterprises questioned have a national market presence of between 250 and 1,000 employees within each country of research.

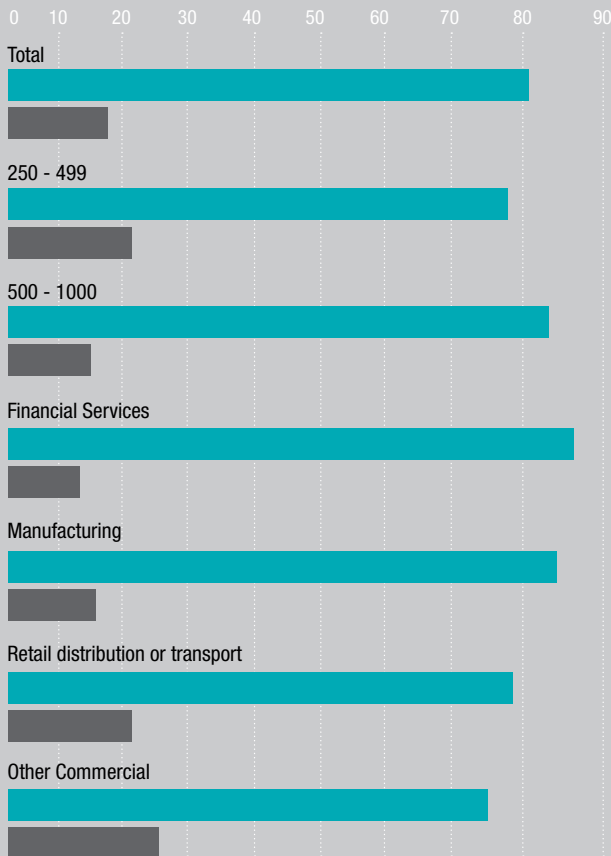
Q.1

Have you considered, or are you considering, virtualising any of your individual IT security functions (e.g. anti-virus, firewall, IPS, web content filtering, anti-spam etc.)?

KEY

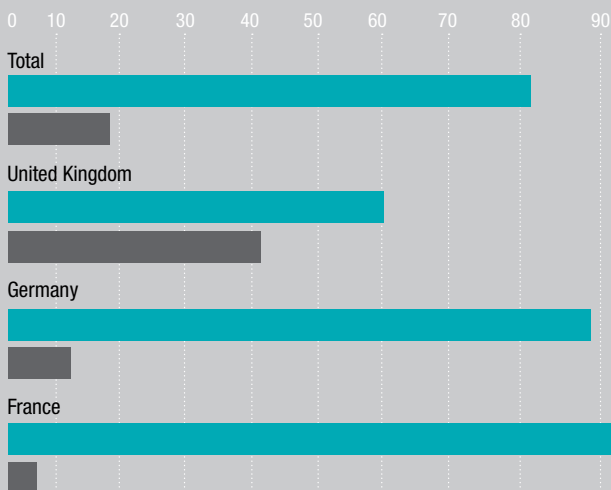
- Yes
- No

Results by company size and sector



	Yes	No	Base
Total	81%	19%	600
250 - 499	78%	22%	314
500 - 1000	84%	16%	286
Financial Services	87%	13%	143
Manufacturing	83%	17%	150
Retail distribution or transport	79%	21%	146
Other Commercial	75%	25%	161

Results by country



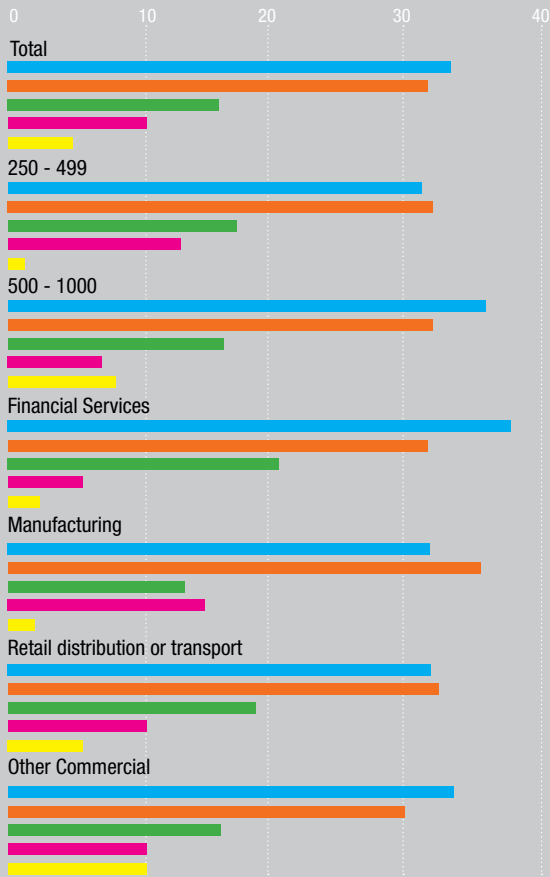
	Yes	No	Base
Total	81%	19%	600
United Kingdom	60%	41%	200
Germany	89%	12%	200
France	95%	6%	200

*Please note: some figures are rounded-up and resulting total might not be equal to exactly 100%.

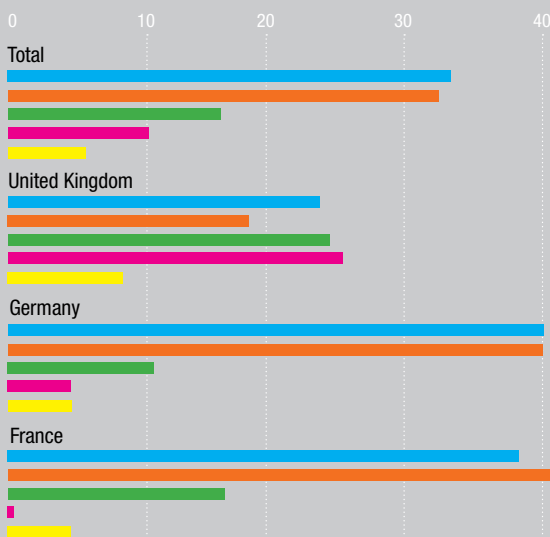
Q.2

Less cost, simplified management, and tighter security are all benefits of a network security consolidation project. And regardless of whether you seek to consolidate just two security functions into one appliance – or hypothetically - several security functions (e.g. anti-virus, firewall, IPS, web content filtering, anti-spam etc.), you can do so without impinging network performance. Given this context, is your organization likely to undertake some form of network security consolidation project in the next 12 months and, if so, what would be the main reason?

Results by company size and sector



Results by country



KEY

- Yes because simplified network security management is really important
- Yes because a lower total cost of ownership (reduced OPEX) is really important
- Yes because tighter network security is really important
- No
- Yes because I believe network security consolidation is now enterprise-ready

	Blue	Orange	Green	Pink	Yellow
Total	34%	33%	17%	10%	6%

250 - 499	32%	33%	18%	13%	4%
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500 - 1000	36%	33%	17%	7%	8%
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Financial Services	37%	32%	21%	6%	3%
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Manufacturing	33%	36%	13%	15%	3%
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Retail distribution or transport	32%	33%	19%	10%	6%
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Other Commercial	34%	30%	16%	10%	10%
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	Blue	Orange	Green	Pink	Yellow
Total	34%	33%	17%	10%	6%

United Kingdom	24%	18%	25%	27%	8%
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Germany	40%	40%	11%	4%	6%
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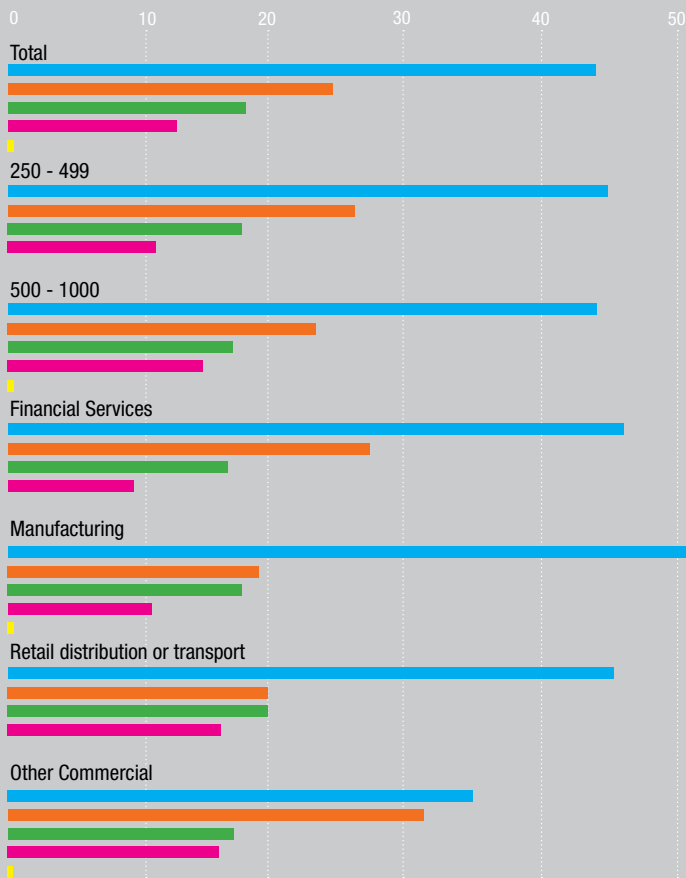
France	38%	41%	17%	1%	4%
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*Please note: some figures are rounded-up and resulting total might not be equal to exactly 100%.

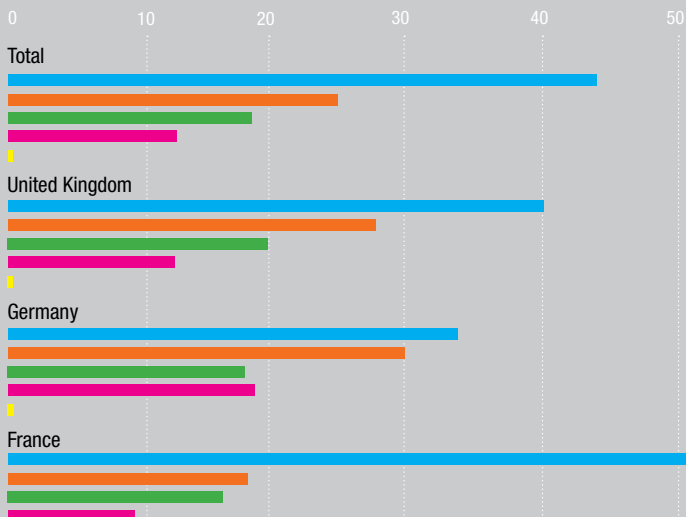
Q.3

If the recession ended tomorrow, which of the following would be the most important lesson you will have learned in terms of your IT security?

Results by company size and sector



Results by country



KEY

- I will be extremely wary of expensive and rigid (e.g. per user) licensing models in future procurement decisions
- I know that I can get 'more for less' from future procurement decisions
- The critical relationship between the strength of my network security infrastructure and the integrity of my organization's public brand reputation will affect future procurement decisions
- Considering the ongoing Opex impact of future procurement decisions will be at least as important as Capex impact
- Other

	Blue	Orange	Green	Pink	Yellow
Total	44%	25%	18%	13%	1%

250 - 499	45%	26%	18%	11%	0%
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500 - 1000	44%	23%	17%	15%	1%
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Financial Services	46%	27%	17%	9%	0%
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Manufacturing	52%	19%	17%	11%	1%
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Retail distribution or transport	45%	20%	20%	16%	0%
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Other Commercial	35%	32%	17%	16%	1%
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	Blue	Orange	Green	Pink	Yellow
Total	44%	25%	18%	13%	1%

United Kingdom	40%	27%	20%	13%	1%
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Germany	34%	30%	18%	19%	1%
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France	59%	18%	16%	8%	0%
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*Please note: some figures are rounded-up and resulting total might not be equal to exactly 100%.