



Information Security a Priority at Fortune® 1000 Organizations

The need to secure data is more important than ever, according to the Information Security Study of Fortune® 1000 organizations conducted by TheInfoPro, Inc, an independent research network.

TheInfoPro interviewed nearly 150 IT end users in Fortune® 1000 companies, gathering data on their current technology implementations and their spending plans for information security technologies.

They discovered that most IT security budgets increased in 2007, primarily to address issues in regulatory and audit compliance and enterprise data protection. On average, companies devoted between \$1-\$5 million to Information Security (IS) in 2006 and 2007, and more than half expect to spend more compared to 2005.

The quest to secure data, especially on laptops, network servers and mobile devices, remains a top priority in enterprise data protection. Data encryption was ranked second among the top ten security infrastructure technologies currently in use and first among those evaluated. Nearly one-third of surveyed organizations plan to spend more money in this crucial endeavor, and most cited PGP Corporation as their chosen vendor.

Securing email is another important consideration, and once again PGP was chosen as the leading securing email messaging vendor.

Aurora Enterprises has led the crusade to raise corporate awareness of the importance of IT security. The company's expertise in messaging security and encryption solutions has increasingly been in demand amongst security vendors and corporate clients. Aurora helps companies secure their information, both from external attacks and from internal theft or carelessness.

For more information on how Aurora can help your company secure its data, or for a security audit, call us at (310) 530-8260 or email us at info@auroraent.com.

The Information Security Study of Fortune 1000® companies is attached.

TheInfoPro Information Security Study

Wave 8, Winter 2007

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Executive Summary

According to the most recent *Information Security Study* of Fortune® 1000 organizations conducted by TheInfoPro, Inc., the need to secure data is more important than ever. Driven primarily by the need to achieve regulatory and audit compliance, enterprise data protection is a high priority for surveyed organizations, which reported an increase in IT security budgets for 2007. Compliance projects tend to be fully funded, with encryption and mobile device security at the top of IT's list of initiatives for the year.

Aurora Enterprises, a leading IT solution provider specializing in data security and compliance solutions, has led the crusade to raise corporate awareness of the importance of IT security. The company's expertise in messaging security and encryption solutions has increasingly been in demand amongst security vendors and corporate clients. In the high-priority data encryption market, Aurora Enterprises partner PGP Corporation retained its position as lead vendor, both in use and in plan projects for 2007, while a set of focused vendors such as Pointsec and platform/operating system providers such as Microsoft and IBM continued to make a strong showing. IBM, Microsoft, and PGP Corporation (all Aurora partners) together account for the largest share of the secure messaging market, while focused messaging security vendors compete for smaller shares.

About TheInfoPro

TheInfoPro (TIP) is an independent research network and leading supplier of market intelligence for the Information Technology (IT) industry. Created by alumni of Gartner, EMC, Giga, and Bell Labs, TIP produces fundamental, objective, "grass roots" research on markets, vendors, issues, future adoption plans, and investor confidence. TIP uses experts to interview experts, thereby creating peer-level discussions delivering insight not found in a Web-based survey or call center approach. TIP interviews practitioners at Fortune 1000 end-user organizations and technology-savvy investors, pre-screening to ensure specific knowledge of a sector, its competitive landscape, products, and services.

Introduction

TheInfoPro's goal is to provide unbiased, unaided research results about IT trends, technology adoption, and vendor use by leading organizations. The *Information Security Study, Wave 8* (Winter 2007) is part of an ongoing series designed to elicit feedback from IT end users on key issues, budget priorities, and preferred vendors across a range of information security solutions to develop a detailed snapshot of the IT industry and an understanding of where IT managers are driving the market.

Methodology

For Wave 8, TheInfoPro (TIP) interviewed 147 IT end users in Fortune® 1000 companies regarding their current technology implementations and spending plans for 39 Information Security technologies, tools, products, and services. Current and planned adoption of each technology (based on reported implementation plans) is adjusted by the organization's IS spending, resulting in a measurement of the technology's usage. Each TIP study uses the same format: Participants receive a questionnaire in advance, followed by an hour-long telephone interview that focuses on decisions and reasons for actions. Multi-wave research conducted every six months checks data accuracy and changes over time.

Industry Trends

Wave 8 highlighted several key industry trends in Information Security (IS):

- The need to secure data is more important than ever, driven by the need to achieve regulatory and audit compliance.
- Encryption and mobile device security are at the top of IT's 2007 project list.
- IT security budgets are set to increase in 2007, especially for compliance projects.

Compliance Driving Information Security

Participating organizations identified the biggest IS "pain point" as everything they needed to do "to remain in compliance with privacy laws and with all the security requirements that come out of privacy laws". Concerns about data privacy and user awareness of the need for information security also ranked among the top five pain points cited.

Data Protection Contributes to Growth in Information Security

Participants also reported that data protection – specifically regulatory and legal compliance, crime prevention, and data privacy issues – topped the list of dynamics driving information security growth.

Information Security Priorities

When asked to name their highest-priority projects for the coming year, participants not surprisingly ranked the following at the top of their lists:

- Regulations & compliance – ranked #1
- Encryption (data security) – ranked #4
- Mobile device security – ranked #7

Top Budget Priority: Compliance

To support these high-priority IS projects, participants reported a median annual IS budget of \$1–\$5 million. More than half of these organizations expect to spend more on information security in 2006 and 2007 compared to 2005. IS budget expenditures in most participating companies are controlled by the Chief Information Security Officer (CISO) or Chief Security Officer (CSO). In keeping with the priorities described earlier, their focus on regulatory projects is reflected in the budget allocated to compliance. More than two-thirds of participants report an increase dedicated to addressing compliance requirements.

Data Encryption and Secure Email Messaging Leaders

As noted earlier, encryption and mobile device security top the list of IS priorities for 2007. Ensuring that the data itself is secure—whether in transit via email and on laptops or mobile devices—forms the core of an enterprise data protection strategy.

Data Encryption

Concerns for data privacy and compliance with regulations and audit standards emphasize the adoption of data encryption technology. Data encryption was ranked second among the top ten security infrastructure technologies currently in use and ranked first of those being evaluated. These facts result in data encryption being ranked near the top of TheInfoPro's proprietary Heat Index™ of information security technologies as well as being among the leading technologies in the Adoption Index. The Technology Heat Index™ measures users' reported spending and implementation plans, implementations, or initiatives, while the Adoption Index tends to move inversely with the Heat Index™ as a technology becomes more widely adopted. In the case of data encryption, the high placement on both indices is indicative of a technology that is maturing through adoption beyond its initial application. Nearly one-third of the organizations surveyed reported they planned to spend more money on data encryption in 2007, reflecting the high priority of these projects.

Participants again named PGP Corporation as the lead data encryption vendor in use, in consideration, and in plan. Also included among the most frequently mentioned vendors were encryption point solution providers such as Pointsec (recently acquired by Check Point Software) and Utimaco. Well-known operating system (Microsoft), systems (IBM), and database (Oracle) vendors rounded out the top ten. (Note that Cisco, Microsoft, IBM, and Symantec hold the top four positions overall among vendors most frequently cited for IS products and services in use or under consideration.)

Secure Email Messaging

In addition to securing data transferred and stored on laptops, network servers, or mobile devices, ensuring secure communications remains a priority for leading enterprises. PGP Corporation was again named the leading secure email messaging vendor in use. Other vendors in the top five most often cited included vendors with significant focus on secure messaging (Tumbleweed and Entrust) as well as industry-leading enterprise messaging platform vendors (IBM and Microsoft).

Conclusion

With the need to protect data as it moves throughout the enterprise and IT budgets driven by compelling compliance and audit requirements, TheInfoPro expects data encryption and secure email messaging to remain a high priority for Fortune® 1000 IT groups. Hardware refresh cycles, new operating systems, and updated productivity applications will also provide further opportunity for IT managers to reconsider existing and new endpoint security application deployments. The *Information Security Wave 9* report, available in the second half of 2007, will show how vendors maintained their position and performed in evaluations, especially in categories such as data encryption.

More Information

The full *Information Security Wave 8* report provides a comprehensive set of market and trends analysis, including the proprietary TIP Technology Heat Index™ and bellwether Competitive Landscape and Technology Adoption Indices. To obtain a copy of the complete TIP *Information Security Wave 8* report for the Fortune® 1000 or midsize markets and to learn about other TIP research in areas such as storage, please visit www.theinfopro.net or contact TIP at 212-672-0010, via email at info@theinfopro.net or by completing the form at www.theinfopro.net/infoform.html.