



COVID-19, New Normal, the Next Normal and Cybersecurity

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In 2019, IDC Outlined CEO's New Agenda for Running a Digital Enterprise

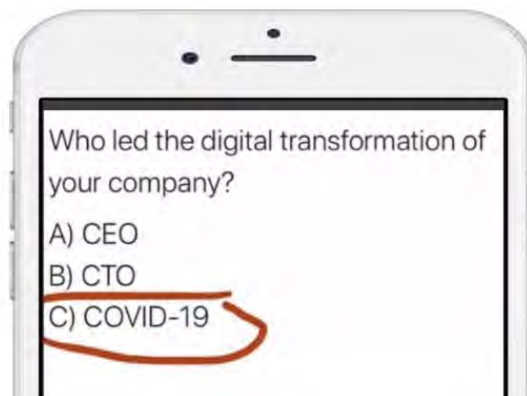


IDC's 2020 Global CEO Survey Confirmed these are Critical Agenda Items

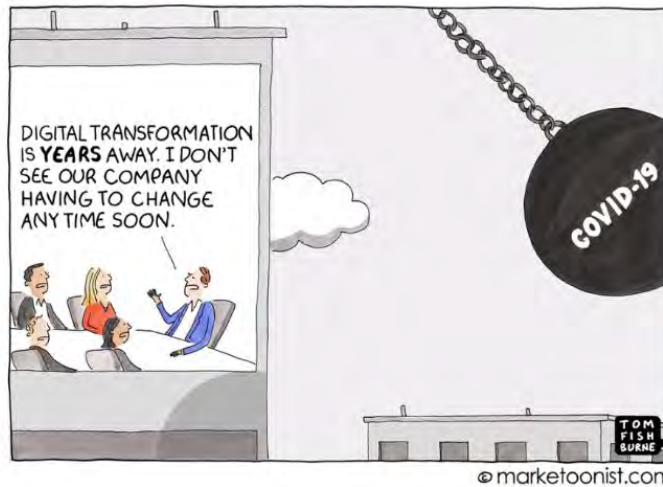
Percentage of CEOs who rate the agenda item as more or significantly more important in next 5 years



Humor or Reality?



The COVID-19 Pandemic Underscored the Criticality of Digital Transformation



The New Normal

“We have a workforce of 300,000 employees. Before the crisis, 50,000 of them could work from home. After 1 week, 250,000 of them could.”

— CIO,
Large German-based Global Manufacturer

Shifting C-Suite Priorities

Q1: As a result of the COVID-19 pandemic, how much will your organization be prioritizing the following initiatives for the rest of 2020 and into 2021? May, 2020

Q2: For each of the 9 items, identify to what extent each area will be important to your organization over the next 5 years as compared to today. Jan, 2020

Post COVID-19 Priorities

Priority Ranking	IDC Nine Future Enterprise Agenda Items
1	Resilient Business Operations
2	Customer Experience Programs
3	Data Programs (to gain insights into our business operations, products and/or ecosystems)
4	Connectivity Programs
5	Software development capabilities to drive product/experience innovation
6	Digital Trust Programs
7	New Industry Ecosystems
8	Digital Infrastructure Resiliency
9	Workplace Transformation

Source: IDC COVID-19 IMPACT ON IT SPENDING Survey (Survey conducted during 7th May to 14th May period). IDC, May, 2020. N=908 global tech decision makers

Pre-COVID-19 Priorities

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4	New Industry Ecosystems
7	Resilient Business Operations
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9	Connectivity Programs

Source: The CxO View of the Future Enterprise in the Digital Economy. Fielded January-February 2020, IDC, N=483 global tech decision makers

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All the architecture is integrated with high availability."

— Julio Pires, IT Manager, Grupo R Carvalho

Shifting C-Suite Priorities

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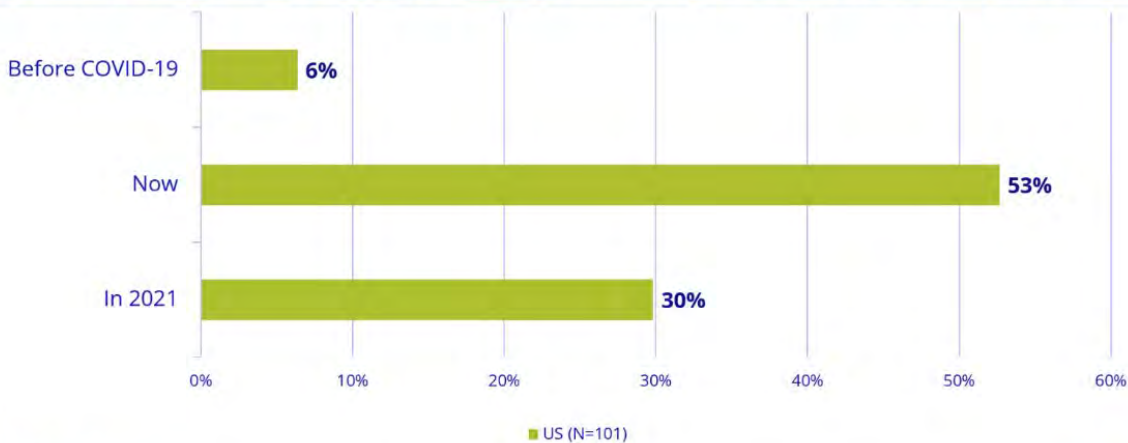
Q2: For each of the 9 items, identify to what extent each area will be important to your organization over the next 5 years as compared to today. Jan, 2020



Source: IDC COVID-19 IMPACT ON IT SPENDING Survey (conducted during 21st May to 28th May period), IDC, May 2020

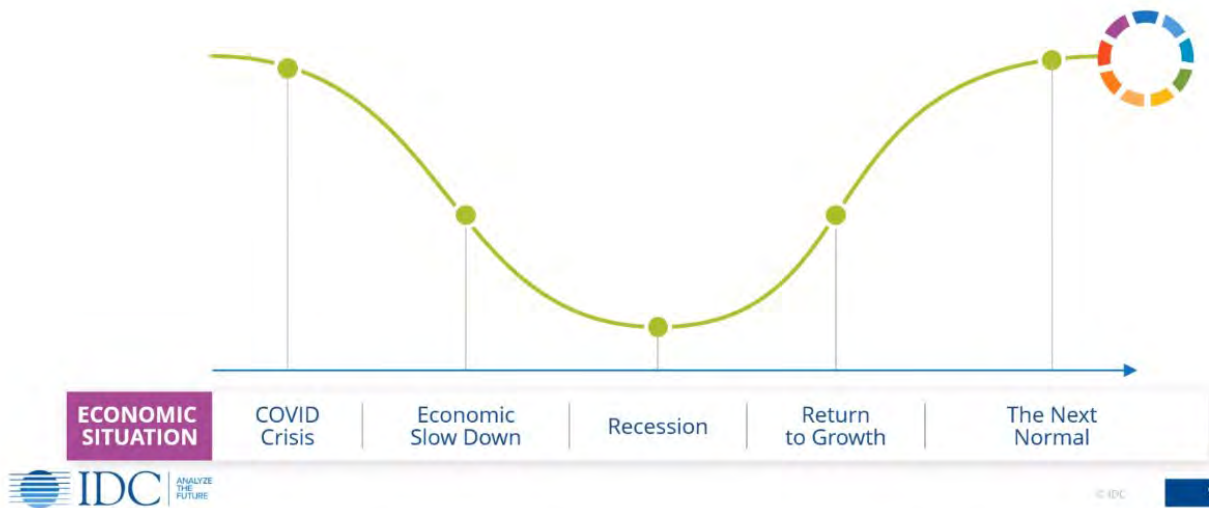
What is the new normal? 5x More Employees will be Working From Home

What percent of your organization's employees were working from home before COVID-19, what percent are working from home now and what percent do you anticipate will be working from home in 2021?



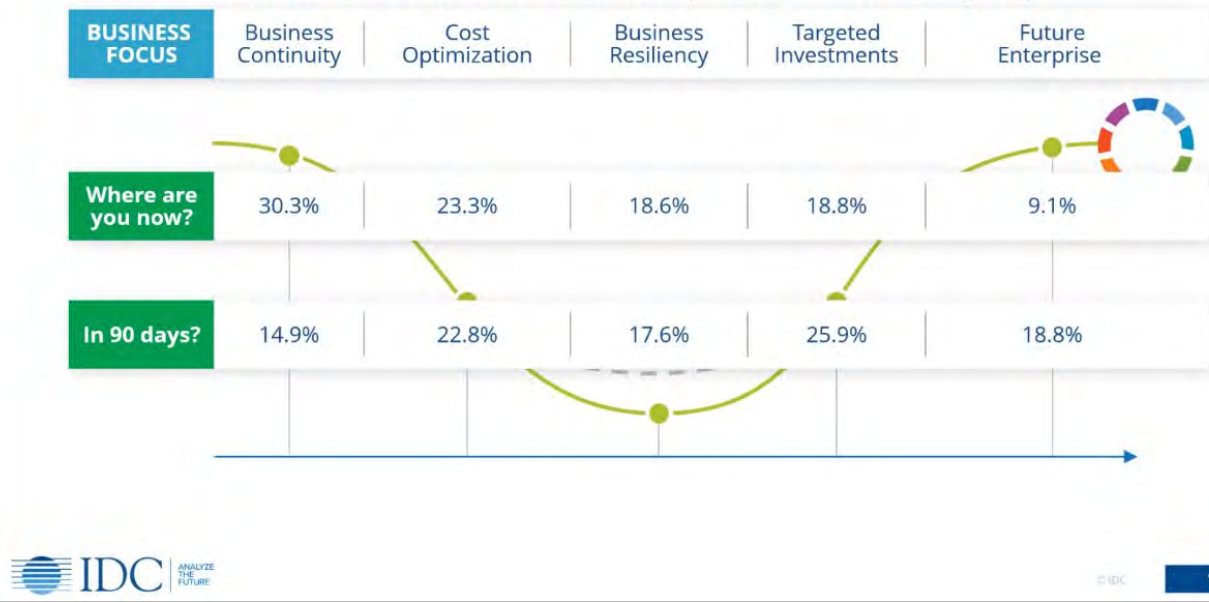
Flattening the Curve

How Tech Builds Business Resiliency and Enables Agility



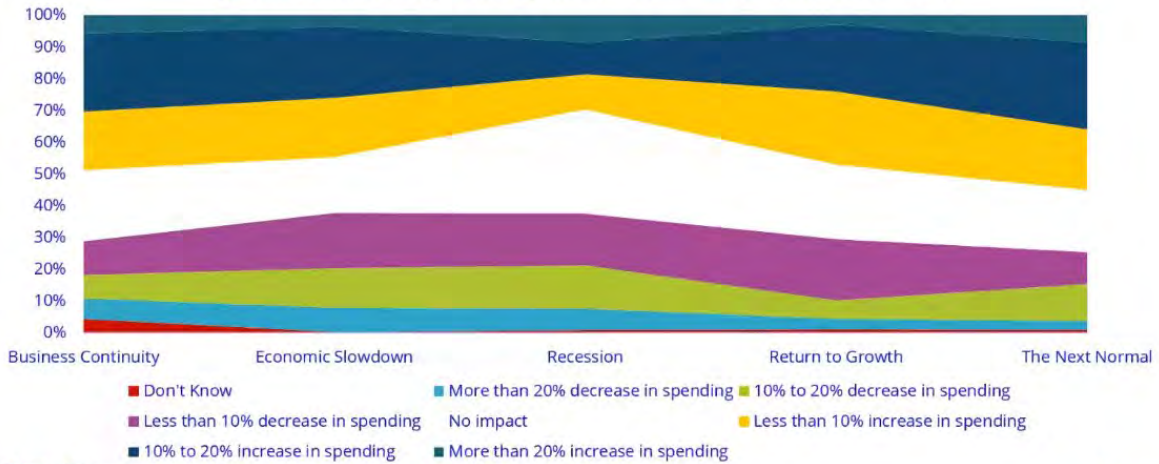
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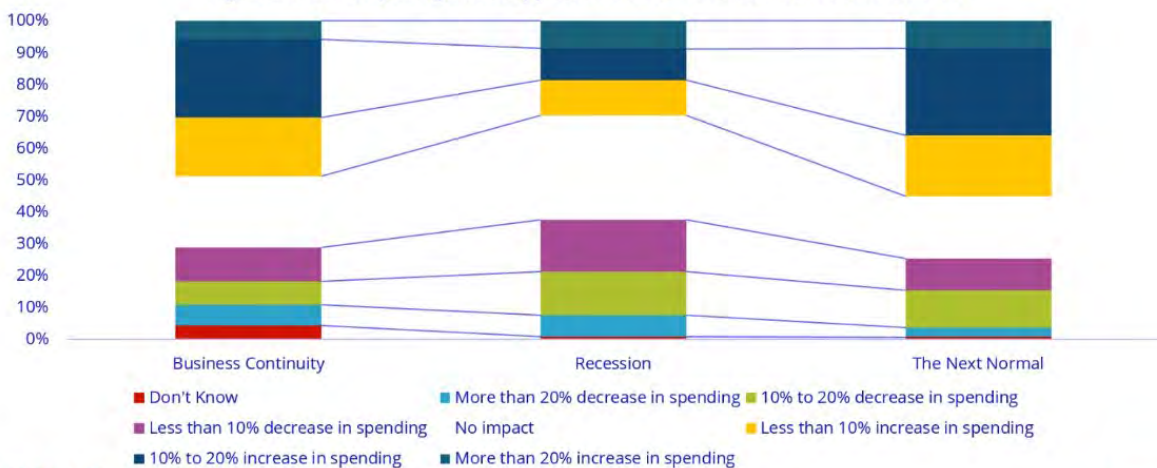
Spend by Projected Spend by Where You will be in 90 Days

Compared to your organization's originally budgeted IT spending plans, in 2020 overall, how do you think your organization's actual spending on security products and services will be affected due to COVID-19?



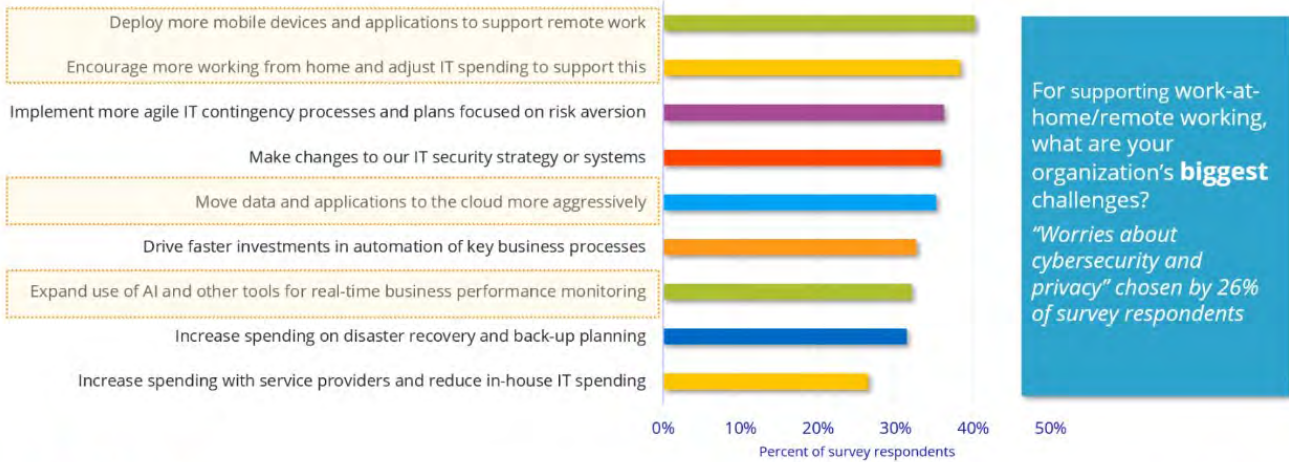
COVID-19 Impact on Expected Security Spend versus 2020 by Where You will be in 90 Days

Compared to your organization's originally budgeted IT spending plans, in 2020 overall, how do you think your organization's actual spending on security products and services will be affected due to COVID-19?



COVID-19 Accelerating Transformations to Third Platform and in Future of Work

How do you think your organization's long-term IT strategy will be affected by the COVID-19 crisis?



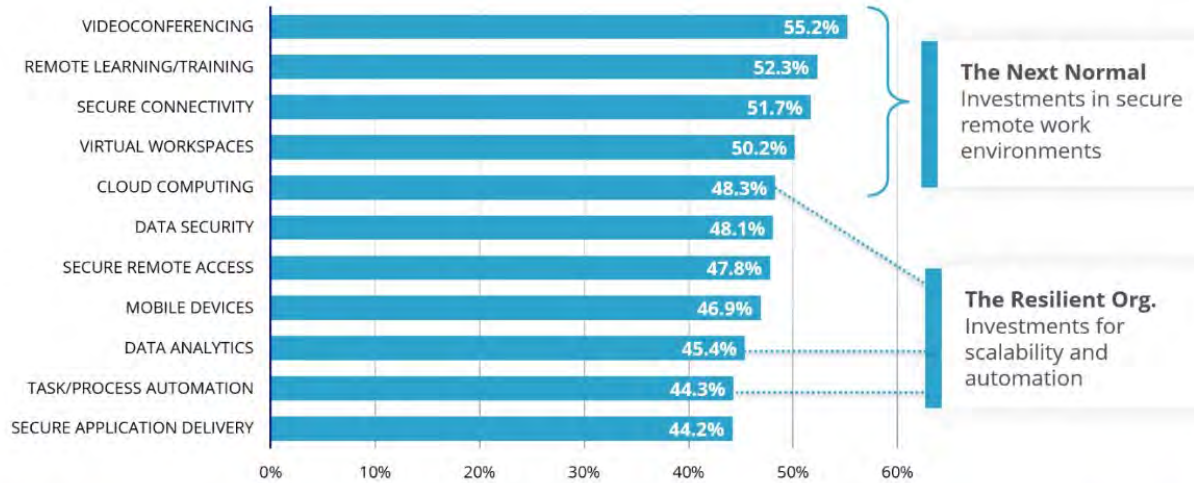
For supporting work-at-home/remote working, what are your organization's **biggest** challenges?
"Worries about cybersecurity and privacy" chosen by 26% of survey respondents



Source: IDC's COVID-19 IMPACT ON IT SPENDING Survey (conducted April 22-April 29, 2020), N=555

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Technologies that Will See Increased Adoption



The Next Normal
Investments in secure remote work environments

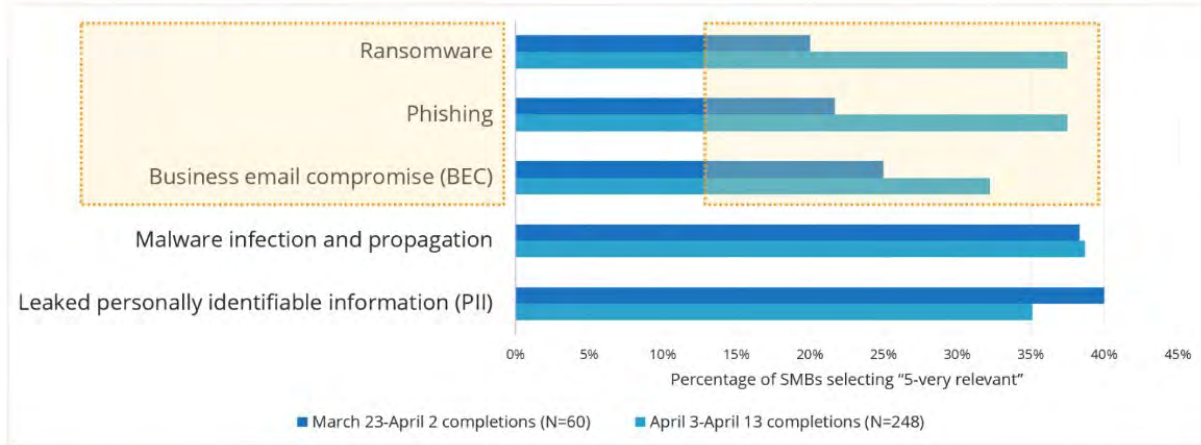
The Resilient Org.
Investments for scalability and automation



Source: COVID-19 IMPACT ON IT SPENDING Survey (Survey conducted during 7th May to 14th May period), IDC, May, 2020
 "Due to COVID-19 and the need for new technology and changes to the working model of some organizations, for which of the following technology investments do you think demand will change, and in which direction?" n=882 global technology leaders

Views on Risk Evolving with the Pandemic; Lean More on Existing Security Products

Please rate the relevance of endpoint security products in mitigating the following risks (1-not relevant to 5-very relevant)



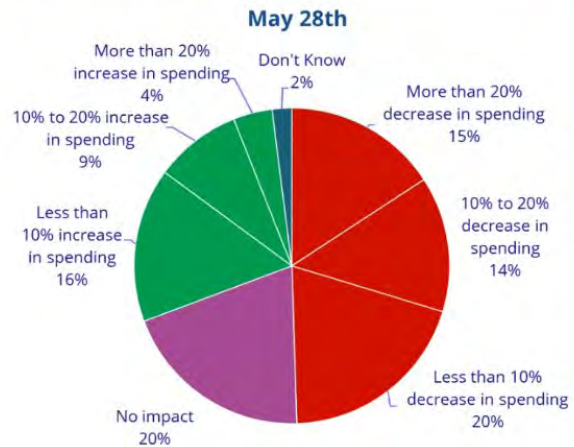
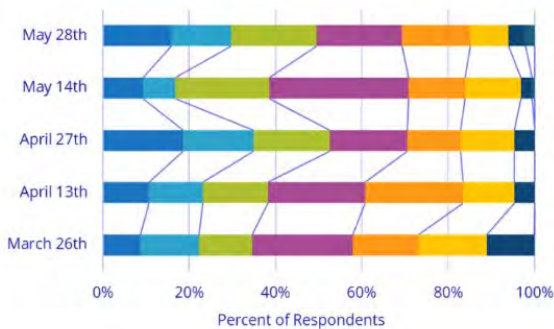
Source: IDC 2020 North America SMB Security Survey, N=308

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IDC Survey Spotlight

How has the expectation security products and services spend changed based on the effects of COVID-19 for North American IT professionals changed over time?

Compared to your organization's originally budgeted IT spending plans, in 2020 overall, how do you think your organization's actual spending security products and services will be affected due to COVID-19?



IDC# US46514120 (June 2020)

Source: COVID-19 IMPACT ON IT SPENDING Survey, IDC, May, 2020, N=167, 160, 160, 161, 101 (North American only)

CEO Priorities Have Changed

“In periods of crisis, financial liquidity is of top priority... We are cutting costs, optimizing working capital and postponing projects and investments that are not urgently required until further notice.”

— Elmar Degenhart,
Chairman of the Board, Continental AG

IDC Survey Spotlight

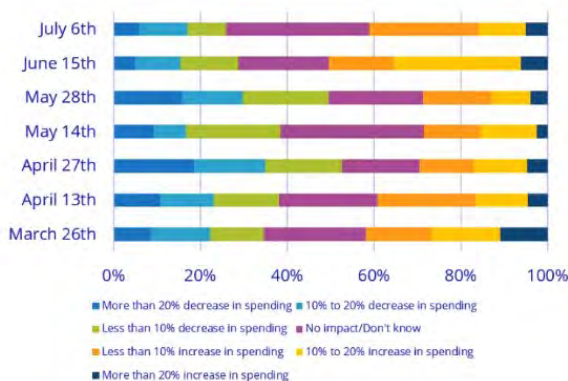
How have North American IT professionals' spending expectations on security products and services evolved since the onset of COVID-19?



Frank Dickson

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North American Respondents



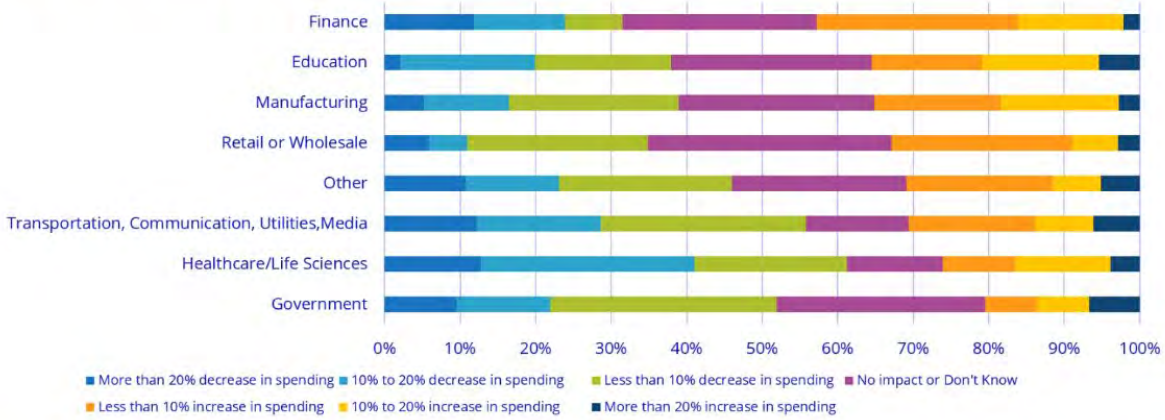
Worldwide C-Suite Respondents



IDC Survey Spotlight

How does the impact of COVID-19 affect the expected spend on security by market vertical and size of business?

Compared to your organization's originally budgeted IT spending plans, in 2020 overall, how do you think your organization's actual spending on security will be affected due to COVID-19?



IDC# (Publication date)
Source: COVID-19 IMPACT ON IT SPENDING Survey (Survey conducted during 21st May to 28th May period). IDC, May, 2020, N=694

CIOs Have an Opportunity to Shine (or Lead)

CIO Operational

Cost Reduction

- Risk Management
- Business Process Optimization

Could potentially be marginalized by Covid-19

CIO Strategic

Orchestrating Digital

- Business Agility and Insight
- New Product/Service Enablement

Have the opportunity to 'shine' in response to Covid-19

CIO Disruptive

Leading Digital

- Business Model Transformation
- Delivering New Revenue Streams

Should be a leading figure in the Covid-19 crisis response team



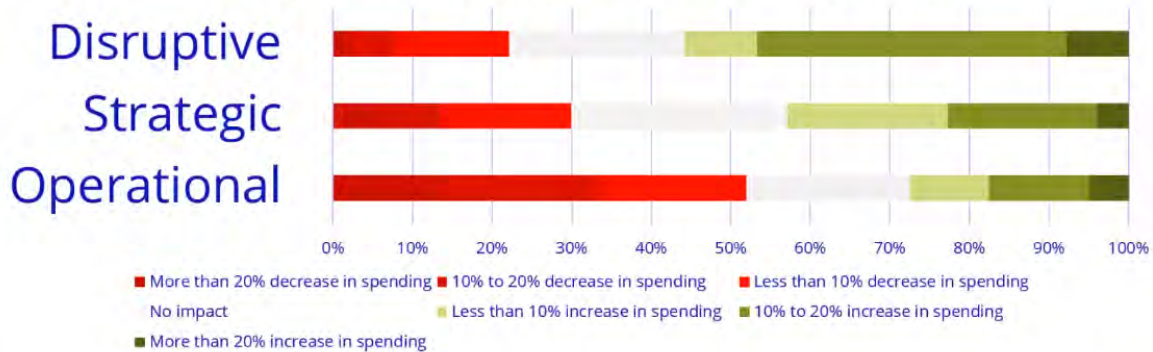
Characterizing CIOs

Before the COVID-19 pandemic, how would you assess where your organization was with respect to its digital transformation?



Security Spend is a "Disruptive" Priority

Compared to your organization's originally budgeted IT spending plans, in 2020 overall, how do you think your organization's actual spending on security products and services will be affected due to COVID-19?



Soft Costs versus Hard Costs. . . And the Lack of Skills

Worldwide Growth in IT Skills (2018-2023) | 10.5M additional FTEs needed over 5 year period

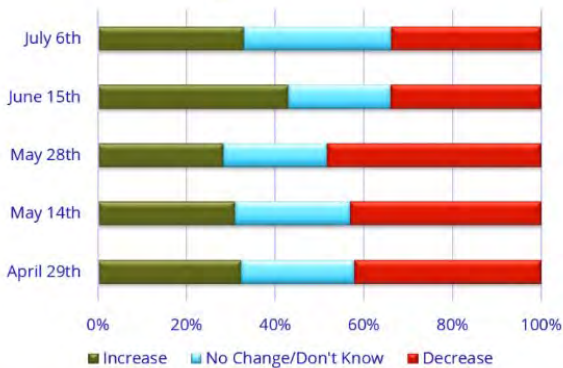


IDC Survey Spotlight

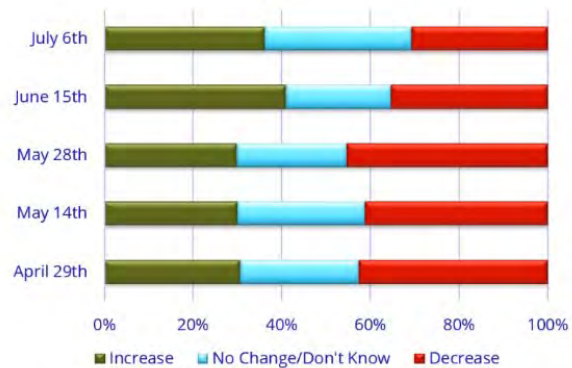
How have IT professionals' spending expectations on security products and services evolved since the onset of COVID-19?

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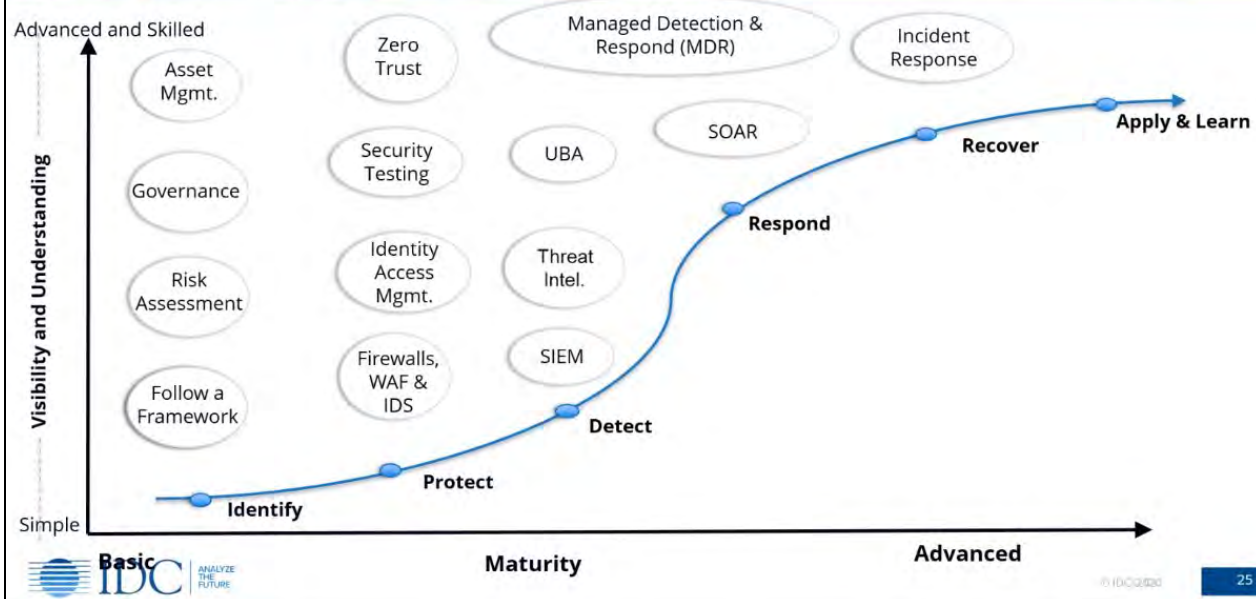
Project Services



Managed Services

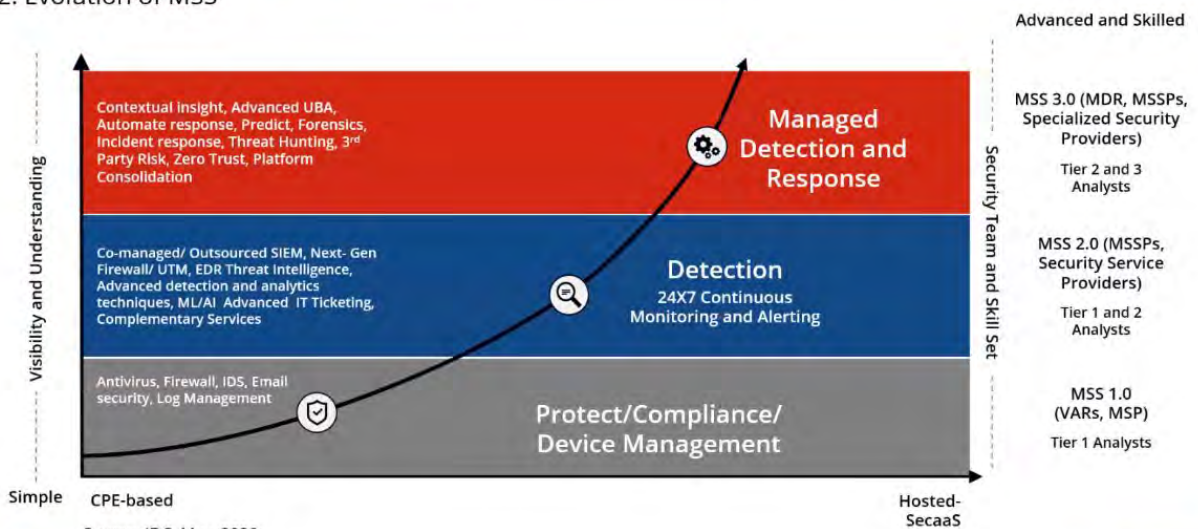


Cybersecurity Evolution

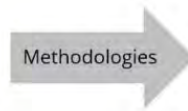
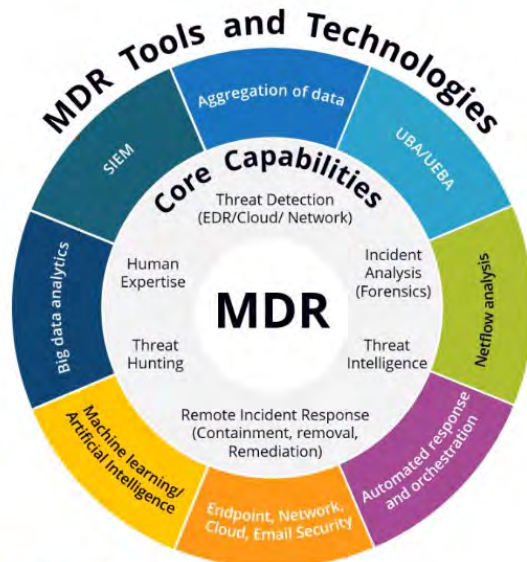


Evolution of Managed Security Services

Figure 2. Evolution of MSS



An Effective Managed Detection and Response Service

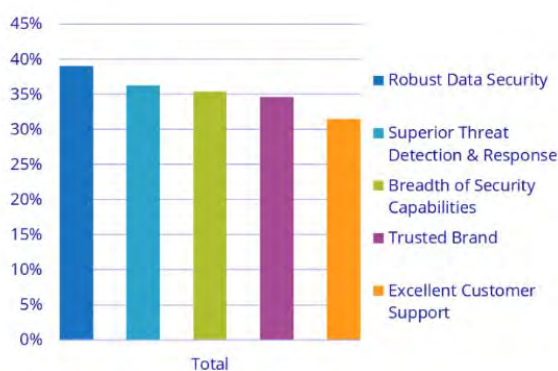


- Value and Impactful
- Effective and Desired Business Outcome

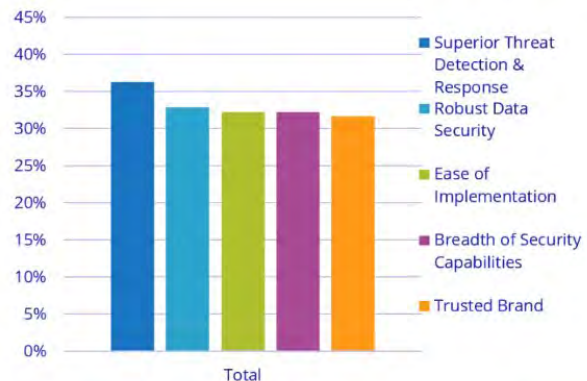
While Evaluating a Service Provider There are Similar Criteria but Different Priorities Between MSSP and MDR Provider Selection

What 5 attributes are most important when evaluating a Managed Security Services Provider (MSSP) and Managed Detection and Response (MDR) providers?

Top 5 Attributes in Evaluating MSSPs



Top 5 Attributes in Evaluating MDR



Securing the Future Requires a Mix of Managed & Professional Security Services

Q5. MEAN SUMMARY TABLE - Below are some functional criteria that may be important to your organization when selecting a 3rd party security service provider for managed and/or consulting services. Please rate each item in terms of importance to your organization where 1=Not important and 10= Very important.



N=402
 Base=All Respondents
 Notes: Managed by IDC's Quantitative Research Group.; Data Not Weighted; Use caution when interpreting small sample sizes.
 Scale: 1=NOT IMPORTANT 10=VERY IMPORTANT
 Source: MSSP Survey 2018, IDC, January, 2019

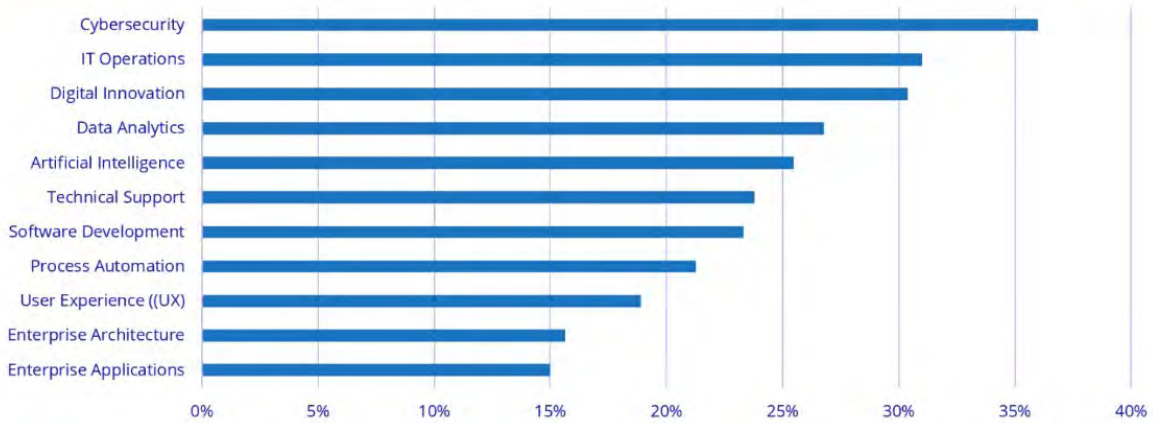
IDC Survey Spotlight

Cybersecurity Professionals do NOT Grow on Trees...Be Careful before doing any Pruning!



Craig Robinson

What technology personas will HR departments be bringing on-board during the initial recovery from COVID-19?



IDC# XXXXXX (July 2020)
 Source: COVID-19 IMPACT ON IT SPENDING Survey (Survey conducted during 4th June to 13th June period), IDC, N=680

What does COVID-19 mean moving forward?



Restrained budgets

Limited cybersecurity talent pool

Weight of established practices and processes

Expanding IT estate and data ponds

Unrelenting cyber threats

Strategic imperative to adapt and be resilient

Post COVID-19 Questions

- Are we going to return to the office?
- Where is my data?
- Where is our infrastructure? Did our move to the cloud accelerate?
- What are my configurations?
- Have we thought through BYO?
- Do you have new threat vectors?
- Do the old ways still work in today's reality?

Covering the basics

- **Secure the home/secure the remote worker**
 - Homes were never designed to be cybersecurity perimeters
 - Employees need help understanding how to secure wired and wireless home networks
 - Unplug Alexa, Hey Google, and keep mobile phones from having active Facebook sessions
 - Provide other options (cellular) if securing the home/remote network environment is not feasible
- **Refresh security awareness programs (e.g. how to detect and report phishing scams)**
 - Remind employees how to report security events and potential threats
 - Help employees understand what employers will see, manage and monitor and what remains private
 - Remind employee about the fair use of corporate data and applications
- **Buy your employee a monitor or two; upgrade corporate computing devices**
 - Does the employee need a separate work printer and/or shredder?
 - Don't give you employees a reason to by-pass security measure. "Don't step over dollars to pick-up dimes."
- **Use strong authentication; Strongest ROI in security**
- **Email may be the foundation of how work is being done**
 - Phishing training has a real ROI
- **Increase diligence and monitoring for network traffic anomalies, and adjust detection mechanisms for the "new normal"**