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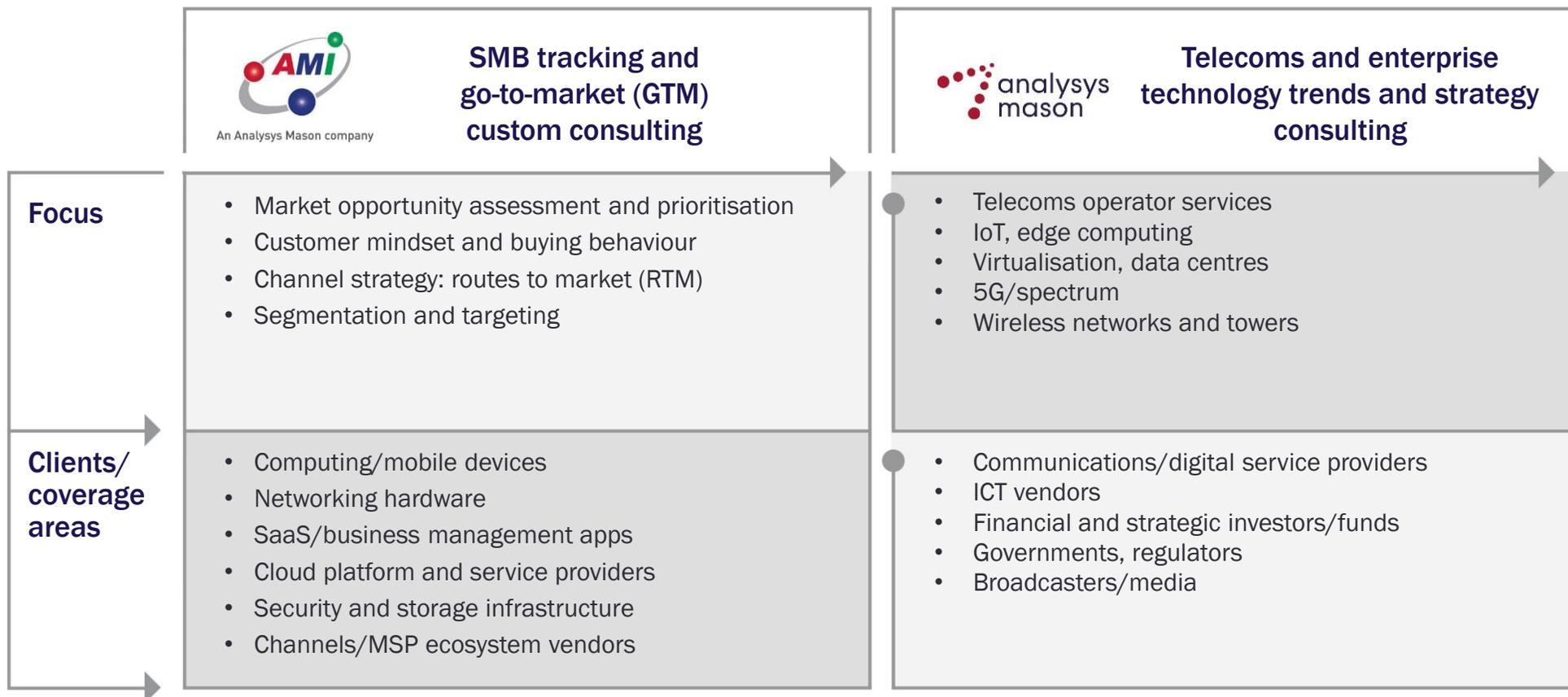**About AMI-Partners and Analysys Mason**

Cyber-security research programme

External marketing support

Cyber-security project expertise

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About us – AMI-Partners and Analysis Mason

SMB tracking and go-to-market (GTM) custom consulting

Telecoms and enterprise technology trends and strategy consulting

Focus

- Market opportunity assessment and prioritisation
- Customer mindset and buying behaviour
- Channel strategy: routes to market (RTM)
- Segmentation and targeting

- Telecoms operator services
- IoT, edge computing
- Virtualisation, data centres
- 5G/spectrum
- Wireless networks and towers

Clients/ coverage areas

- Computing/mobile devices
- Networking hardware
- SaaS/business management apps
- Cloud platform and service providers
- Security and storage infrastructure
- Channels/MSP ecosystem vendors

- Communications/digital service providers
- ICT vendors
- Financial and strategic investors/funds
- Governments, regulators
- Broadcasters/media

We have a systematic four-step process to help security vendors develop a go-to-market strategy for the small and medium-sized business (SMB) market

Market opportunity assessment and prioritisation

1

Customer mindset and buying behaviour

2

Channel strategy: routes to market (RTM)

3

Customer segmentation and acquisition

4

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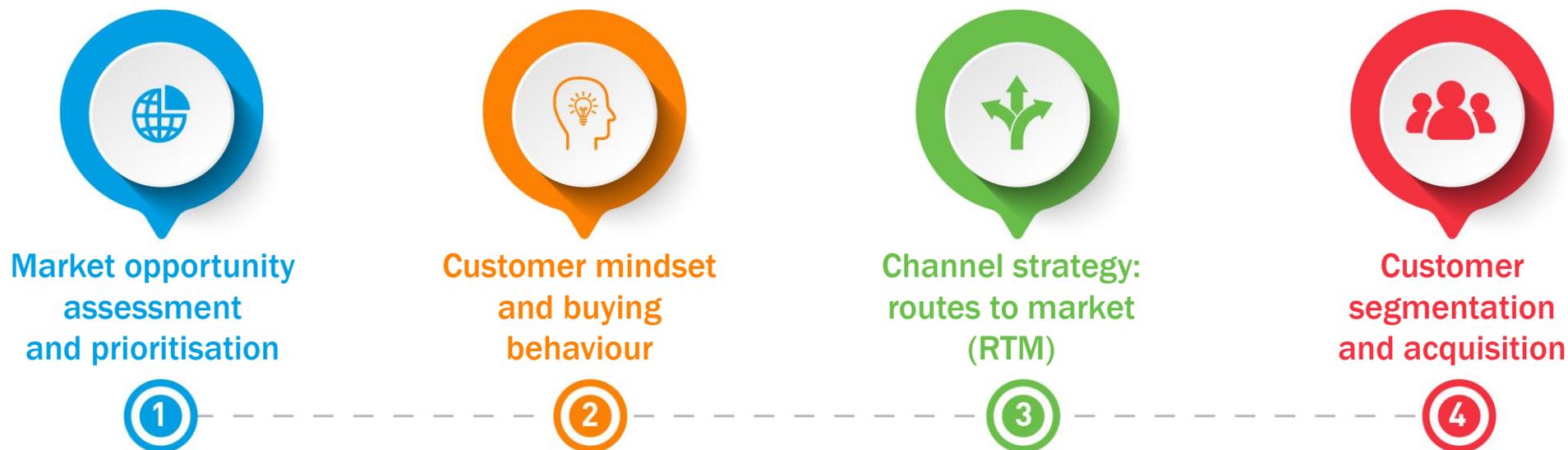
SMB research products available from Analysys Mason

ICT Global Model

- 130+ ICT business categories
- 52 countries and 5 'rest of region' areas
- 19 industry verticals
- 13 business sizes
- 8 routes to market

Managed Service Provider Strategies research programme

- Market forecasts on business spend with MSPs
- Survey insights into all aspects of MSPs
- Strategy reports and commentary
- MSP landscape country reports
- Case study reports
- Quarterly MSP M&A tracker

Cyber Security research programme

- Market forecasts on business security service spend
- Survey insights into security solutions
- Strategy reports and commentary
- Profiles of security vendors
- Case study reports
- Quarterly security revenue and M&A tracker

PCs and devices reports

- Country-specific insights into SMBs:
  - device usage
  - buying behaviours
  - brand preferences
  - purchasing channels
- 12 countries
- 6 business sizes
- 8 PC/device types

ICT global survey report

- Business conditions and performance
- Business transformation and automation
- IT infrastructure deployment and budgets
- Purchase channels usage and preference
- Buying behaviour
- 10-country coverage

SMB research available from Analysys Mason

	Market opportunity assessment and prioritisation	Customer mindset and buying behaviour	Channel strategy: routes to market	Customer segmentation and acquisition
Syndicated and on-demand research				
ICT Global Model	✓		✓	✓
Managed Service Provider Strategies	✓	✓	✓	
Cyber Security	✓	✓	✓	
PCs and devices	✓	✓		
ICT survey country overviews (Australia, China, France, Germany, India, Indonesia, Saudi Arabia, South Africa, UK, USA)	✓	✓	✓	✓
Worldwide ICT survey report	✓	✓	✓	✓
Consulting	✓	✓	✓	✓

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Cyber Security programme overview: our research will help our customers to sell security solutions to small and medium-sized businesses, an underserved market

The importance of the SMB security market

The market for cyber-security solutions is growing rapidly. We forecast that worldwide business spend on these services will grow from USD57.5 billion in 2018 to USD92.3 billion in 2023 (at a CAGR of 9.9%).

SMBs are at the core of this growth opportunity. SMBs are often underserved by security vendors, many of which focus on large enterprises. However, SMBs face many of the same risks as large enterprises; indeed, the impact of a security breach can be greater for smaller organisations.

Overview of the subscription

A subscription includes:

- access to all of our published research and forecasts, including forecasts, survey data, trackers, strategy reports and market commentary

- **access to our analysts** – an unlimited number of enquiry calls with our analysts.

Why our research is different

The key differentiators of our research are our focus on:

- the SMB market segment (up to 1000 employees)

- go-to-market strategies and issues – we also cover technology, but are most interested in how vendors sell to and support this technology in the SMB market

- providing strategy support – our research can help with marketing, but we are a strategy consulting firm and our main aim is to help our customers to improve their performance.

Who is the research is aimed at

The Cyber Security research programme is designed to help all parties that are interested in selling to the SMB market, including:

- security vendors

- other vendors of technology services that participate in the cyber-security market

- telecoms operators.

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Programme content: the Cyber Security programme includes forecasts, surveys, company strategy reports and market commentary

	Areas covered	Example reports
Forecasts	Forecasts for the key security services (including endpoint, mobile and network), security hardware and IaaS security	▪ Regional forecasts (e.g. Western Europe, Developed Asia–Pacific) ▪ Worldwide forecast summary
Surveys	▪ Survey of almost 3000 businesses in 10 countries ▪ Insights into how businesses use different security solutions	▪ Usage and planned usage of security solutions by businesses in different countries ▪ Security-related needs of, and challenges faced by, businesses in different countries
Strategy reports and commentary	▪ Revenue structures of security vendors, and mergers and acquisitions within the industry ▪ Products/services commentary	▪ Revenue and profit trends for security vendors and their expansion strategies ▪ Differentiators and route-to-market approaches of security vendors
Vendor profiles	▪ Ongoing series of profiles of key vendors, covering their strategy and our assessment of strengths and weaknesses	▪ Profiles of Panda, McAfee, Symantec etc.
Trackers	▪ Trackers, updated quarterly, following key metrics and developments in the security market	▪ M&A tracker ▪ Security revenue tracker

Forecasts: the programme includes detailed forecasts of the opportunities in the cyber-security market

REPORT COVERAGE		

Geographical

Regions modelled:
- Western Europe
- Central and Eastern Europe
- North America
- Middle East and North Africa
- Emerging Asia–Pacific
- Developed Asia–Pacific
- Latin America
- Sub-Saharan Africa

Enterprise size

Segments:
- Micro (0–9 employees)
- Small (10–49 employees)
- Medium (50–249 employees)
- Large (250+ employees)

Services and products

Endpoint security:
- Encryption
- Secure content management
- Web/messaging security

Mobile security:
- Mobile application management
- Mobile device management

Security hardware:
- Dedicated security appliance
- Unified threat management appliance

Network security:
- Firewall
- Identity and access management
- Intrusion detection/prevention
- Other security and vulnerability management
- Security information and event management

Software-as-a-service:
- Infrastructure-as-a-service (IaaS) security

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Survey: we have interviewed 3000 businesses in 10 countries to understand how their cyber-security needs are evolving

Europe

Asia–Pacific

North America

Africa and the Middle East

Question topics

Adoption of security solutions. Businesses' protection against internal data theft/loss and external cyber-security threats and attacks, and whether security solutions are installed on-premises on PCs/servers or provided/managed via the internet (or both).

Security-related events. Businesses' experience of events such as phishing, ransomware, hacking, DDoS attacks, and the effect that these events have had on their operations (including recovery costs and associated revenue losses).

Spend on security solutions. Spend on monthly subscriptions to a service, or on software and hardware that is deployed and managed internally.

Security-related needs and challenges. Drivers for security-services-related decisions (for example, regulatory and legal compliance, shifting business applications to the cloud), and the challenges associated with developing in-house cyber-security capabilities (such as a lack of specialised staff).

Service providers. Businesses' preferred partners/brands (vendors) in the cyber-security space.

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Commentary: the programme explores how the portfolio of security services providers is evolving and how they deliver services

Services (and products) offered

Topics include:

- managed security services
- threat protection
- information protection
- endpoint security
- email security
- network security
- cloud security.

Routes to market, partnerships and M&A activity

- Security vendors' routes to market, and the role of systems integrators, managed service providers and telecoms operators in the security market.
- Drivers of M&A activity and partnerships in the cyber-security space.

The move to a security-as-a-service model

- Trends related to on-premises security solutions as well as those services provided/managed via the internet.
- Trends related to consulting/ professional services/support in the cyber-security space.
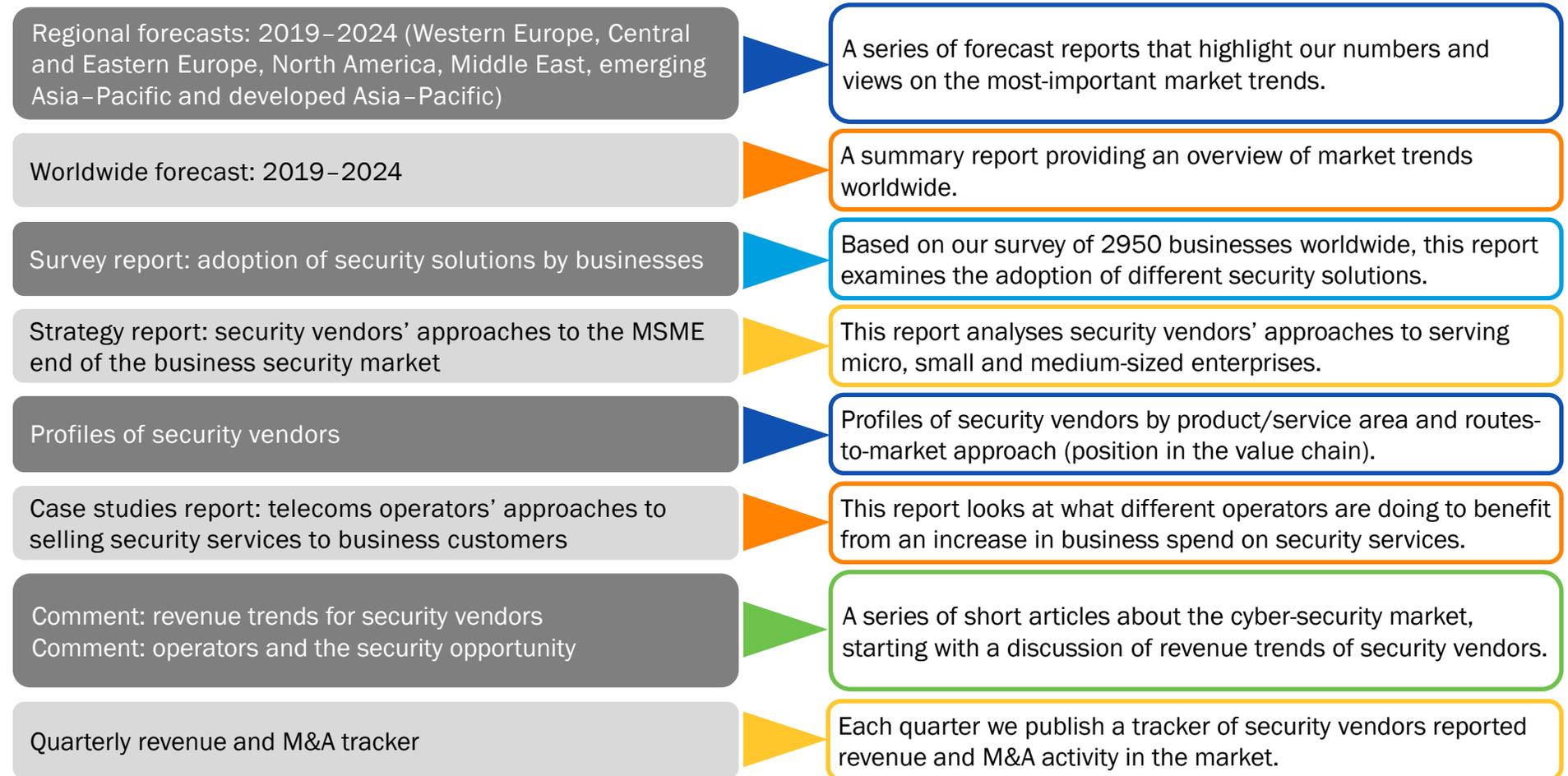
Trends in business adoption of security solutions

- On a country/regional level.
- Spend on different types of services/solutions.
- Spend on monthly subscriptions to a service, or on software and hardware that is deployed and managed internally.

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The Cyber Security programme has a mix of forecasts, surveys, strategy reports, commentary and market trackers
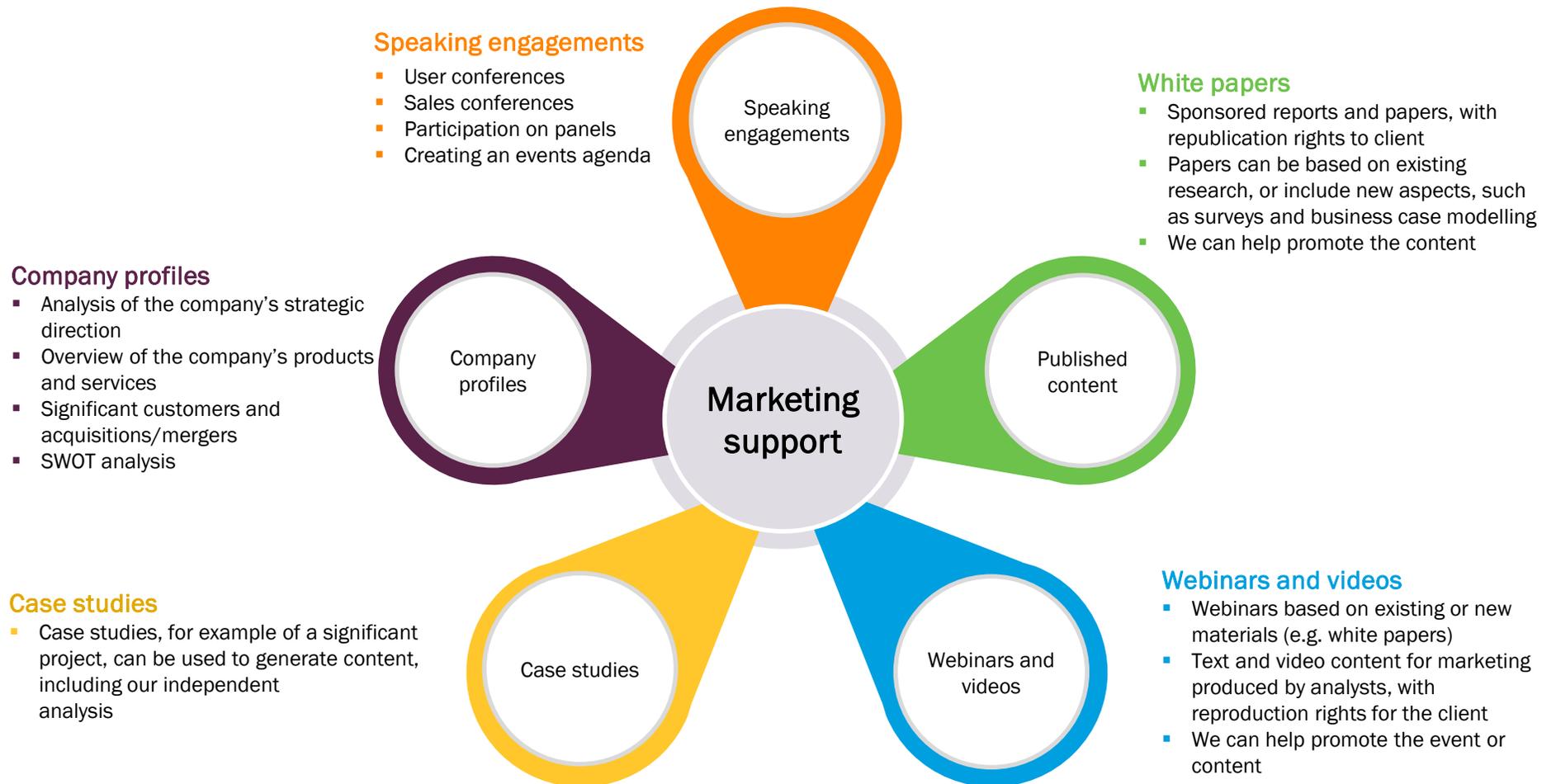
Forthcoming reports in the Cyber Security programme

Regional forecasts: 2019–2024 (Western Europe, Central and Eastern Europe, North America, Middle East, emerging Asia–Pacific and developed Asia–Pacific)	A series of forecast reports that highlight our numbers and views on the most-important market trends.
Worldwide forecast: 2019–2024	A summary report providing an overview of market trends worldwide.
Survey report: adoption of security solutions by businesses	Based on our survey of 2950 businesses worldwide, this report examines the adoption of different security solutions.
Strategy report: security vendors' approaches to the MSME end of the business security market	This report analyses security vendors' approaches to serving micro, small and medium-sized enterprises.
Profiles of security vendors	Profiles of security vendors by product/service area and routes-to-market approach (position in the value chain).
Case studies report: telecoms operators' approaches to selling security services to business customers	This report looks at what different operators are doing to benefit from an increase in business spend on security services.
Comment: revenue trends for security vendors Comment: operators and the security opportunity	A series of short articles about the cyber-security market, starting with a discussion of revenue trends of security vendors.
Quarterly revenue and M&A tracker	Each quarter we publish a tracker of security vendors reported revenue and M&A activity in the market.

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Clients can also benefit from additional external marketing support

Speaking engagements
- User conferences
- Sales conferences
- Participation on panels
- Creating an events agenda

White papers
- Sponsored reports and papers, with republication rights to client
- Papers can be based on existing research, or include new aspects, such as surveys and business case modelling
- We can help promote the content

Company profiles
- Analysis of the company's strategic direction
- Overview of the company's products and services
- Significant customers and acquisitions/mergers
- SWOT analysis

Case studies
- Case studies, for example of a significant project, can be used to generate content, including our independent analysis

Webinars and videos
- Webinars based on existing or new materials (e.g. white papers)
- Text and video content for marketing produced by analysts, with reproduction rights for the client
- We can help promote the event or content

Speaking engagements

Company profiles

Marketing support

Published content

Case studies

Webinars and videos

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Analysys Mason has performed over 20 cyber-security related projects for clients

Recent examples of cyber-security related projects

Summary	Description
Market segmentation work for a security vendor	We conducted a segmentation of the SMB market based on business, technology and security mindset, needs and budgets. A four-segment solution and strategy was developed for markets across Europe, Asia, LATAM and North America. Segments and positioning were aligned with a solutions portfolio based on segment needs and individual product capabilities. Purchase channel presence and capabilities were mapped to each segment and product in the portfolio. Clients used our predictive tools to identify target segments. It rolled out this capability to its sales force and partner ecosystem.
Security strategy benchmark	Our client, a leading operator in Asia-Pacific, was exploring the development of a leading-edge security strategy to ensure their successful introduction. Analysys Mason conducted a benchmark of its current security strategy against those of other relevant operators across the following dimensions: vision and organisation, security virtualisation progress, cloud and orchestration strategy and edge strategy. Our report concluded that, while all operators interviewed had stated ambitions in security, they did not necessarily have leading-edge virtualised security strategies, providing some re-assurance on our client's current and future security strategy. Our study also identified a number of relevant security functions to consider for virtualisation by our client in the short/medium-term.
Presentation on cyber security and IoT	For a leading ICT service provider in a Middle Eastern country, we developed a set of presentation documents on cyber-security threats in IoT. Our client used these materials to support a presentation on IoT during an international conference.
Cyber-security briefing paper for the European Parliament	The European Parliament's Committee on Industry, Research and Energy (ITRE) asked Analysys Mason to develop a briefing paper on cyber-security strategy for the energy sector, for use by parliamentary members. The commissioning of this paper reflects the increasing importance of cyber security in ensuring the reliability and stability of the EU's power networks. The paper was intended to contribute to a general debate on how to maintain the performance and reliability of the energy sector and protect it from cyber threats. In developing the briefing paper, we focused on energy systems, particularly smart grids, which are increasingly reliant on complex information and communication technology (ICT) systems in order to meet the growing needs of regulators, operators and end users.

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We conducted total addressable market analysis on advanced cyber-security services for a major global security vendor

The problem

The client wanted to understand the size of the advanced cyber-security services market worldwide. The objective was to provide the client with a view of the business security landscape so they could optimise their product portfolio with key advanced security services and assess the opportunity for selling directly via original equipment manufacturers.
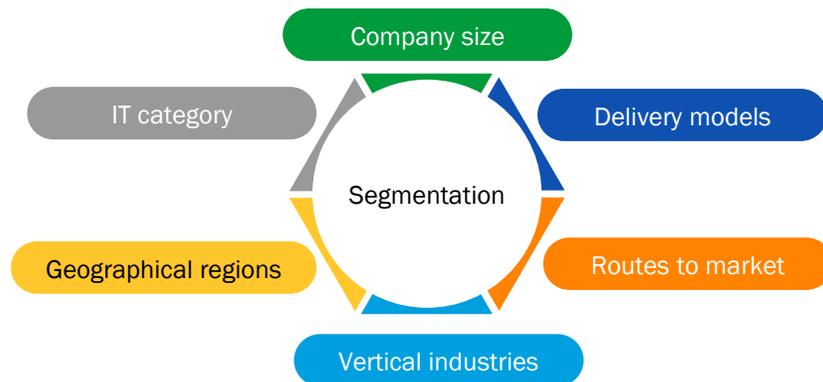
The solution

To understand the cyber-security market for businesses, we:

- used the Analysys Mason Global ICT Model to deliver a customised market sizing and forecast report for specific security solutions that aligned with the client's product portfolio

- provided forecasts for end-user spending on advanced cyber-security services

- segmented the total addressable market (TAM) for security services by:
    - company size (number of employees)
    - vertical industries (agriculture, banking, construction, etc.)
    - region
    - routes to market.

Segmentation lens for advanced cyber-security categories

Source: AMI-Partners

The result

- We provided a user-friendly Excel pivot tool with filters for the segmentation variables/categories, enabling the client to analyse the data to generate TAM-specific insights.

- The Excel tool helped the client to conduct an opportunity analysis of various go-to-market channels.

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