New IDC MarketScape China Situation Awareness Solution Market Vendor Evaluation Report 2019 Officially Released

Beijing, October 21, 2019– IDC today released its China Situation Awareness Solution Market Vendor Evaluation Report 2019, serving as a reference for users when selecting situational awareness solution providers in China. The report has received extensive attention and active cooperation from numerous security vendors and endusers.

For the report, IDC conducted in-depth research on 13 representative situational awareness solution providers, including comprehensive security vendors, cloud service providers and emerging providers.

The vendors assessed in the report are (in alphabetical order): Asiainfo-Sec, Cyberskysec, DAS-Security, H3C, Huawei, Lanyun Technologies, NSFOCUS,QI-Anxin, SANGFOR, Tencent Cloud, TOPSEC, Venustech and WebRAY. The vendor evaluation results are presented in the form of images based on the IDC MarketScape model.

IDC predicts that the number of newly-developed applications will reach 500 million by 2022, equivalent to the total number of applications developed in the past 40 years. As a result, IT systems will become increasingly complex and thus more vulnerable to a wider range of sophisticated attacks. In the face of all-new IT technology, traditional security defense systems will gradually lose their ability to protect companies. IDC has found that situational awareness solutions are forming the core of the new generation of defense systems. Based on the China Situation Awareness Solution Market Vendor Evaluation Report 2019, IDC makes the following recommendations.

Enterprises must effectively improve the security capabilities of their active defense systems: Traditional passive defense are struggling to meet cybersecurity protection needs during the current global shift towards digital transformation and, as a result, active security defense systems are becoming mainstream in the world. IDC's cybersecurity Analytics, Incident, Response, and Orchestration (AIRO)is a core concept used in the building of active security defense systems. It is the "intelligent brain" of such systems, and has played an important role across multiple industries.

Intelligence and analysis have become the core capabilities of situation awareness platforms: Without the input of threat intelligence and big data analysis capabilities, situational awareness platformscannot effectively compare and detect attack information. As a result, they

are unable to adequately play their roles. Further improvement of situational awareness platforms is required as they have yet to acquire mature automatic scheduling capabilities.

Probe deployment is extremely important: The integration of effective edge threat analysis, terminal threat analysis and situational awareness platforms makes it possible to quickly discover cyberattacks, block the attack chain and reduce exposure to attacks. Therefore, deploying network layer probes and terminal device probes will become the most important component of building an effective defense against cyberattacks.

The importance of MSS rises: Following the deployment of situational awareness platforms, managed security services (MSS) have become extremely important. This is because although customers can quickly find abnormalities with the help of situational awareness platforms, they typically lack sufficient manpower or the corresponding technology to deal with cyberattacks.

Platforms lack a unified interface for connecting with security products: Situational awareness platforms can connect with all kinds of security products, but currently lack a unified security interface for them. Consequently, IDC predicts that customized development of unified security interfaces is inevitable.

Customized development for application scenarios widely exists: In environmentswith a large number of customers, there are a greater number of customization requirements for different application scenarios. Such customized development services are quite common and customized development for application scenarios will enable situational awareness platforms to play an increasingly bigger role.

The integration of AI will improve situational awareness platforms: Although the integration of artificial (AI) technology is still in the early stages, as it matures, situational awareness platforms are bound to rapidly acquire higher levels of intelligence.

Commenting on the report, **James Wang, Assistant Research Director for Cybersecurity Market at IDC China**, said that global digital transformation has entered into the stage of "multiplied innovation", a term used to refer to the next chapter of the IT industry's 3rd Platform Era.

"In this era, cyber threats are posing growing challenges to business development," he said. "Enterprises must fully integrate their cybersecurity and business development strategies and actively adopt scientific methods to build active security defense systems that meet their specific needs. This is the only way for them to effectively minimize cyber threats."

According to Wang, the situational awareness solution/platform is a crucial part of active cybersecurity and is destined to become the 'intelligent brain' of active security defense systems.

"For enterprises, public institutions and key information infrastructure-related industries, situational awareness solutions/platforms have become something which they must build," he said. "The market has entered a period of accelerated growth."

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About IDC MarketScape

IDC MarketScape vendor analysis model is designed to provide an overview of the competitive fitness of IT, telecommunications, or industry-specific suppliers in a given market. The research methodology utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that results in a single graphical illustration of each vendor's position within a given market. IDC MarketScape provides a clear framework in which the product and service offerings, capabilities and strategies, and current and future market success factors of IT, telecommunications, or industry-specific vendors can be meaningfully compared. The framework also provides technology buyers with a transparent foundation to allow companies to independently compare the strengths and weaknesses of current and prospective vendors.

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International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,100 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a subsidiary of IDG, the world's leading technology media, research, and events company. To learn more about IDC, please visit www.idc.com. Follow IDC on Twitter at @IDC

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Figure 1

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