

Changing the Game: Monthly Technology Briefs

September 2011

**New Security:
A \$4-Billion Market in 2011**

Read the Capgemini Chief Technology Officers' Blog at
www.capgemini.com/ctoblog



'New' Security in 2011: A \$4-Billion Market

Sally Hudson, an IDC analyst, positioned the new role of security recently at a high-profile global event by defining *it as the external necessity for an enterprise to be able to do business with any other enterprise*. This is already driving the growth rate for the current \$4-billion market towards a \$6-billion market by 2016, at which point it would equate to more than 10 percent of the Enterprise Applications' spend. However, this rapidly growing market is not about traditional IT department security measures, such as Firewalls, which allow Enterprise Applications to be deployed internally with little or no regard to the issue of security. Instead, it is the embedding of key elements into all hardware and software.

There are several factors driving this 'new wave security' starting with the strong shift towards people, devices, and services with new business requirements on using these capabilities for external business-to-business, or consumer-to-business that has been the basis for strong growth in certain technology sectors.

But there are other factors involved too as CIOs consider how to use external resources better for everything from Business Process Outsourcing to consolidated data centers. As an example, the planned shutdown of more than 500 data centers of the US Government and the use of either virtualization or cloud technology for consolidation has led to a whole new federal program around security. The US Government plans to introduce by 2016 a 'National Strategy for Trusted Identities in Cyberspace' or NSTIC to *allow state and private business to get the full benefit of eCommerce*. Managing personal user identities with attributed permissions and activity monitoring is one key aspect of new wave security and tied closely with the growth in mobility.

To understand the shift in focus for security technology, as with other key new technologies, it is best to understand the split in activities that is occurring around the terms; mainly, inside-out and outside-in. **Inside-out** is traditional IT which is strongly internally focused and any activity such as access to the web occurs from the 'inside' of the enterprise, where the focus remains on the firewall, security through signing onto the applications themselves, reinforced by infrastructure controls as the focal point to provide security. The key point is that everything is controlled from 'inside' the enterprise, even in the case of external matters such access to the web itself, or even the older style use of mobile devices on to enterprise applications.

Inside-out with firewall protection, single-sign on, and other security aspects have been implemented to enable an enterprise not to have to consider security independently for each and every application, and user. The new challenge for security is created by a shift towards external services, and indeed users, customers, suppliers etc., that are not supported under this internally focused model. In extreme cases, as with Sony and other high profile security breaches, the failure has been to address the issue of understanding this difference and managing how external operations (such as, the gaming customers) are linked to existing internal applications (the credit card transaction system).

The term **Outside-in** describes this new external environment and the various situations created by using cloud technology, shared resources, and above all the shift to mobility. Mobility describes architectures where there are any number of users, devices, and services in no fixed relationship to each other or even at a fixed location on a fixed wired connection. Cloud defines that services and servers are supplied dynamically in terms of capacity and on consumption in terms of what is required when and are, therefore, the counter side of mobility. Together, they create an entirely different technology and business operational environment based

on the familiar Internet/web architecture with its use of standards, actual or *de facto*, defined by acceptance, to ensure that the 'any-to-any' relationships will work.

The emergence of security standards for the Internet and web has been underway for some time now, with moves such as Security Assurance Markup Language (SAML) having become accepted, as has the work of the Jericho Forum in providing a framework to secure each element of a business interaction between enterprises. However, the acceptance still needs much work to put into practice. At the same time, there are new standards for supporting clouds as both business services and shared resources are now being generated.

As on August 1, 2011, the Cloud Security Alliance (CSA) has drawn together 94 major companies in the industry ranging from the top vendors to many service providers as corporate sponsors to create an effective set of security standards, and to agree to the practice of how they should be used both in products and in deployment. More importantly, its Board of Directors and other members is heavily populated by major users. This is a characteristic that it shares with other standards bodies in the cloud and business process sectors such as the Open Data Center Alliance working on standard definitions for all data centers to support cloud services, or the Open Group working on business-to-business process standards.

As increasingly new technology drives the way an enterprise does business externally, its ability to protect itself, its customers and partners becomes a critical success factor, as well as an audit requirement. The rapid growth of the new wave security market reflects this as essential expenditure for an enterprise to meet the IDC analyst's definition of 'the external necessity for an enterprise to be able to do business with any other enterprise'.

The impact of this and other technologies is discussed in the [Capgemini CTO Blog](#).

Leading Company Results (Revenues)

Leading Company Results (Revenues)		
Full Year	Juniper ↑ 2% @ £1.1bn	
Half year	ATOS ↓ 0.7% @ €2.47bn	
Q4	Cisco ↑ 3% @ £11.2bn	
Q3	Symantec ↑ 15% @ \$1.65bn	
Q2	ARM ↑ 18% @ \$117.8mn	Motorola ↑ 28% @ \$3.3bn
Q1	Lenovo ↑ 15% @ \$5.9bn	

Movements by Industry Leaders

Cisco plans to enter the tablet market according to some sources claiming that tablets are network devices that Cisco could manage connections and services to in innovative ways. www.cisco.com

Oracle Java Standard Edition 7 (SE 7) is now available for public download and is claimed to be an 'evolutionary' version that moves towards a major revision of Java SE 8 next year offering support for code running in other languages and multi-core processors, as well as improvements to graphics and sound media and new APIs. **Oracle is acquiring InQuira** to add their web self-service and agent support knowledge management products to the Oracle CRM line. **Oracle add 83 new Accelarate Solutions** prebuilt implementations for mid-size enterprises. **Oracle Insurance Quantitive Management and Reporting for Hyperion Financial Management** adds support for Solvency II compliance requirements. **Oracle Communications Network Charging and Control 4.4** provides new revenue charging capabilities and management for telecommunication service providers. **Oracle Solaris 11 Express** is now supported on the Oracle Exadata Database Appliance. www.oracle.com

HP Unified Communications range of capabilities and services grows with new OEM deals with a variety of partners, including Microsoft to offer everything to migrate from traditional wired land-lines to full virtual workplaces. **HP Global Authentication Service** is providing a cloud-based track-and-trace service for counterfeit pharmaceuticals as a set of services to the pharmaceuticals industry. **HP announced radical changes in strategy** to move further towards software and services and have less dependency on low margin hardware, as part of this review **the PC business will be shed**, and the newly launched **HP TouchPad dropped together** with the previously high-profile **WebOS operating** system from the Palm acquisition. **HP Compaq 8200 Elite Desktop** 'all-in-one' range upgrade claims 'dramatic' performance improvements as well as new features such as built-in video conferencing. www.hp.com

Intel Atom is taking a new path around a 'modular architecture' that will allow quick and ready adaption of the Atom processor for optimization in various specialist markets and to directly compete against specialist market competitors. **A \$300-million support package for UltraBook developers** will be available over the next three years to ensure the new lightweight, high performance tablets are well supported in the market. Intel preannounced **a new Itanium Processor chip called Poulson** that will ship on 2012 with more than 3.1 billion transistors set out in eight cores. www.intel.com

Microsoft OneNote Mobile for iPhone 1.2 is now on general release and will be free for a limited period. Windows Phone Mango beta tools for developers have been revised following an announcement that shipments from phone manufacturers **will start in time for Christmas 2011**. **Microsoft is offering a Security prize** of \$2,00,000 for a research idea that is completely novel in managing security. **Microsoft Windows 8** will feature an 'app store' style of **approach for user-based acquisition and use** of software. Microsoft is offering **HP WebOS developers free tools, training and phones** to switch onto Windows Phone 7. www.microsoft.com

SAP is working with Google to integrate Google Maps into its Business Analytics offerings to provide location-based information. SAP Business by Design new release allows on- and off- premise versions of various SAP software including traditional R/3 and Business Suite to be run together. **SAP Business Objects Governance Risk Compliance 10.0** update provides a common user experience for all reporting and monitoring information regardless of source in order to encourage wider use as a proactive source of information. www.sap.com

Google has added new functions for Tablets running on Android and Apple iOS, and is to extend its **Instant Pages** feature supporting ultra rapid page loading to be a standard feature in the **Chrome 13 update**. New features for **ChromeBook laptops** include adding support for VPNs and virtual desktops using the newly included Citrix-based capability. Google has continued to improve the **Gmail user interface and capabilities** with further small rolling upgrades. In a move that caused extensive comment from analysts, **Google has announced its intention to acquire Motorola**. Analysts are stating this has made Google a direct competitor with its current partners for Android Phone OS, though statements from the CEOs of HTC, LG and Sony Ericson all stated a view that they would continue to work with Google. **Google free Apps Online suite** has gained a range of new administration tools similarly to those which are part of the paid for Google Apps Business suite. www.google.com

Apple iPad is outselling all other tablets combined by eight to one say latest statistics. Apple co-founder and chief executive Steve Jobs has announced his resignation as chief executive but will remain with the company as chairman of the board of directors. Chief operating officer Tim Cook will step into the chief executive role. www.apple.com

Amazon Web Services have increased the coverage in terms of countries for their Virtual Private Cloud service to provide a claimed 'worldwide' coverage and have introduced full-user control over the access of the network to access the services they are using. **Amazon suffers more outages** attributed to a back-up generator failure after a lightning strike in its Irish data center and is offering affected users ten days of free credit. Amazon is to **acquire Push Button**, an interactive television software provider. www.amazon.com

Open Source Update

Redhat Enterprise Virtualisation 3.0 is now available as a beta with a new approach which allows it to run as a Java Application on a Linux server. **Redhat OpenShift Cloud Platform** will support Java EE 6 that is claimed to both offer more alternatives and greater flexibility for developers. www.redhat.com

Mozilla Firefox 7 beta is now available for downloads and covers Windows, Linux, Apple Mac and Android operating systems, with technical improvements to improve performance and stability as a priority and some user improvements around synchronization of user-defined activities such as bookmarks and passwords. www.mozilla.com

OpenStack Cloud Alliance has been joined by HP, which together with existing members including Cisco and Dell is seen as strengthening the industry moves to develop a standard basic set of standards and code for Servers and Management. www.openstack.org

Microsoft Novell SUSE Linux alliance has been renewed for a further period of four years, with the purchase of a further \$100 million of SUSE licenses from Novell for Microsoft to resell and a new set of joint development goals around cloud computing. The new **Microsoft Operating System Windows Phone Mango** has been released to phone manufacturers and first models are expected for Christmas sales. www.novell.com

Oracle MySQL 5.6 has been released for testing and feedback comments around a range of new features including full text search, improved backup and partitioning as well as big performance improvements. www.oracle.com

More Noteworthy News

EMC Mozy Online Backup Service supports all common mobility devices from PCs to Apple iPads, Android tablets and various smartphones to provide real time on-line dynamic backing up. **EMC is acquiring Asankya**, a provider of cloud delivery performance tools. www.emc.com

Centrix WorkSpace 5.1 gains new capabilities for managing cloud apps and services use and subscriptions management integrated with the WorkSpace iQ management portal. www.centrix.com

Samsung Thin Clients range gains a new high-end model in the NC220, with a claimed first in using the new Cisco Universal Power Over Ethernet (UPOE) to connect to the server removing the need for separate power supplies even for high-end units needing more than the old 30 watts standard. **Samsung Galaxy Tab 10.1** adds a new interface called Touchwiz, as well as a host of new features to support business users and link to Microsoft and other leading vendors office products. www.samsung.com

Dell OpenStack Cloud Solution for IaaS provides a reference design for public and private clouds based on Dell PowerEdge servers and Crowbar, an Open Source administration tool. **Dell Vostro V 131** extends the low-cost notebook range and features a claimed nine plus hours of battery life. **Dell surprised the market with a reduction of between 5 and 9 percent in their 2012 sales forecast** arguing that government procurement slowdown and a shift towards tablets were having big impacts. **Dell EqualLogic storage family** gains three new units; one for remote office using cloud-based data, a mid-range high performance unit and a high-end Networked Attached Storage unit. www.dell.com

LogMeIn Central Management now allows individual policy management on a per user basis for iPhone's and iPads though the capability will be extended to cover all popular mobility devices. www.logmein.com

CA AppLogic 3.0 provides a migration tool for applications to be moved onto virtualized systems with new capabilities including support for VMware as well as Xen. **CA Automation Suite for Clouds 1.0** aims to provide an extended migration path towards more complex changes in operations. www.ca.com

BlackBerry Messenger Service 6 supports instant messaging from within 22 popular BlackBerry applications allowing real-time communication about the information in the application. **BlackBerry 7 operating system is shipping** in new Torch and Bold ranges. A simpler version of **BlackBerry Management Center** is now available for SMEs. www.blackberry.com

Symantec Enterprise Vault gains auto email classification of Microsoft Exchange during archiving operations and is able to provide a similar capability for some social networks allowing prioritizations for storage and recovery.

www.symantec.com

Toshiba Europe has introduced a 1-Terabyte 2.5inch drive suitable for laptops which is an industry breakthrough. www.toshiba.com

Netgear ProSafe 52 port Gigabit Stackable Smart Switch provides SMEs with an easy-to-set-up switch capable of managing security policies on ports.

www.netgear.com

Citrix is acquiring RingCube, a provider of virtual desktop software, to augment its current XenDesktop product. www.citrix.com

Juniper Networks Junos Pulse tool suite has moved to becoming a carrier offering with AT&T the first customer using it to manage its mobility services offerings supporting Apple, Google, BlackBerry, Microsoft, and Symbian devices.

www.junipernetworks.com

McAfee WaveSecure Mobile has gained an iOS option to cover Apple iPad and iPhone management for data backup, stolen device tracking and remote data wiping. www.mcafee.com

BMC Middleware Manager has new tools and capabilities to support what is described as 'end-to-end application management'. Also included in the update is the ability to support IBM WebSphere Data Power appliances. www.bmc.com

Adobe Customer Experience Solutions suite extends the Adobe Digital Enterprise Platform to be able to manage reactions to online campaigns from blogs to advertising. www.adobe.com

Autonomy announced its acquisition by HP as part of the major strategy realignment of HP towards software and services rather than a dependence on hardware. www.autonomy.com

Skype WiFi Network now provides support for Apple iPad and iPhone via free downloadable software. Skype has announced its **intention to acquire GroupMe** to provide a messaging service that would compete with BlackBerry Messenger as well as complete the range of Skype media supported. www.skype.com

Veeam Backup and Replication 6.0 is ten times faster as well as simpler to deploy and manage in its support for Microsoft Hyper-V hypervisor.

www.veeam.com

Ruckus Wireless Flexconnect Platform offers a new approach to managing mobile devices to set up secure WiFi connections and is aimed at allowing clients to use their own devices with enterprise management of their connections and use. www.ruckus.com



About Capgemini and the Collaborative Business Experience™

With around 115,000 people in 40 countries, Capgemini is one of the world's foremost providers of consulting, technology and outsourcing services. The Group reported 2010 global revenues of EUR 8.7 billion. Together with its clients, Capgemini creates and delivers business and technology solutions that fit their needs and drive

the results they want. A deeply multicultural organization, Capgemini has developed its own way of working, the Collaborative Business Experience™, and draws on Rightshore®, its worldwide delivery model

Learn more about us at www.capgemini.com.

Andy Mulholland

Global Chief Technology Officer, Capgemini
Tel. +44 (0)207 434 2171
andy.mulholland@capgemini.com

