

Market Maturity and Adoption Analysis

In 2007 our analysis focuses on what products and services reside in what portions of the security space and how they work within the overall framework of enterprise security.

The market maturity table shows the level of maturity in different parts of the market space Each area is rated by the maturity of tools and the adoption level:

- **Bleeding edge (B)** indicates an area where few dare to tread because the space is not yet built up to the point where common understanding of the issues is in place.
- **Early adopters (E)** indicates areas where the space is not yet widely accepted but there is enough common knowledge to make it viable and likely to remain over time.
- **Shakeout (S)** indicates an area where there are too many products for sustenance over time with no clear leaders.
- **Mature (M)** indicates a market in which new companies are unlikely to be able to find a successful niche and current participants are likely to be stable for a significant time.
- +/- indicate a lack of or presence of widespread adoption

According to our efforts in 2006, the space is relatively mature at the execution level and developing in the process level for operations, but management and executive-level controls are very weak and only supported by small consulting practices and, to a lesser extent, by the major accounting firms, who are moving away from many of the areas of import where they were operable at one time. Specification is still weak but developing slowly, while the feedback and verification has made great strides, led by compliance requirements and legal drivers.

Area	Policy Standards Procedures	HR	Legal	Risk	Testing & Change Control	Technical Safeguards Physical Information	Incidents	Audit	Knowledge and Awareness	Document
Create / Specify	E-	B-	B-	B-	B-	E-	B-	M+	B-	B-
Manage	E	B-	B-	E	E-	E+	M+	E-	B-	
Process	S+	E	E-	S	S	S+	M+	S	E	
Execute	S+	S	E-	M	M+	S+	M+	S	S	

Market maturity and adoption rates

The only fully mature and widely adopted vertical area of the market is the audit space, where internal and external audit have been forced into place by regulation and where there is a long history of audits and relationships between audit firms and executive management across most of the market all over the world.