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## **The 451 Group: Enterprise Security Information Management Industry Is in a State Of Flux as it Experiences Consolidation and Moves Upstream**

### ***New Report Provides Marketplace Intelligence and Analysis to Enable End Users, Vendors and Investors to Navigate the Enterprise Security Information Management Sector***

*New York, January 23, 2007* – The 451 Group, a New York-based technology-industry analyst company focused on the business of enterprise IT innovation, found that the Enterprise Security Information Management (ESIM) industry is in a state of flux. It is in the process of consolidating, while also moving upstream on its way to becoming a key part of information technology service management (ITSM). These findings are discussed in a new 451 Security Quarterly report, the first in a series of reports designed to provide clients with timely analysis and perspective on key technology trends and marketplace developments in the world of enterprise security.

"Once ESIM becomes an integrated component of ITSM products, in about 18 months' time, ESIM pure-play vendors will have three choices – get bought, restrict themselves to a niche market or go away," said Nick Selby, senior analyst and director, Enterprise Security Practice at The 451 Group.

451 analysts believe that to grow ESIM, vendors will have to aggressively expand their integration with traditional security products, move from security into adjacent compliance-sensitive verticals with different priorities (such as energy and telecommunications), and also move further upstream to become an integral part of network operations, into the ITSMs of the HP OpenView, IBM Tivoli and BMC Patrol ilk.

"A wave of consolidation is about to sweep through this space. When it does, vendors at the wrong side of the curve will be left hanging," added Selby.

This 90-page report, 'ESIM: Security information management moves upstream,' was written by Nick Selby together with Andreas Schneider, Research Associate, and Lee Bruno, Editorial Director, Special Reports. This 451 Security Quarterly report takes an in-depth look at enterprise security information management, which begins with the proliferation of log data from the likes of firewalls, virtual private networks (VPNs), intrusion-prevention systems (IPS), intrusion-detection systems (IDS) and anti-malware. It then looks at the technologies and products offered to relieve the strain. It provides marketplace intelligence and analysis to enable end users, vendors and investors navigate this complex topic.

#### **Key Companies Covered**

The report includes in-depth competitive assessments of the following companies (although this is not a complete list of companies covered in various sections of the report): ArcSight, CA, Cisco, Consul, eIQnetworks, IBM Tivoli, LogLogic, LogRhythm, netForensics, Network Intelligence, Novell, OpenService, Q1 Labs, SenSage, Splunk, Symantec and TriGeo.

#### **Report Orders**

To learn more about this report, or to discuss developing a client relationship with The 451 Group, contact Simon Carruthers, Vice President of Research Services, via phone at 212-505-3030 x-103, or via e-mail at: [simon.carruthers@the451group.com](mailto:simon.carruthers@the451group.com).

## **About The 451 Group**

The 451 Group is an independent technology-industry analyst company focused on the business of enterprise IT innovation. The company's analysts provide critical and timely insight into the market and competitive dynamics of innovation in emerging technology segments. Clients of the company – at vendor, investor, service-provider and end-user organizations – rely on 451 insight to support both strategic and tactical decision-making for competitive advantage.

The 451 Group is headquartered in New York, with offices in key locations, including San Francisco, London and Boston. The company also operates Tier 1 Research – an independent division of The 451 Group, headquartered in Minneapolis – which analyzes the financial and industry implications of developments impacting public and private companies within the IT, communications and Internet sectors.

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