6th Annual
Global Information Security Survey
(GISS)

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"The 1998 GIS survey respondents indicate IT security will be the Y2K for the next decade and as Y2K problems are addressed and resolved, the security of the infrastructure necessary to support an emerging connected global economy will be paramount."

**Jon Darbyshire
Partner, ISAAS
Ernst & Young**

GISS History --

For six years, Ernst & Young Information Security Services teams have been surveying Information Security professionals to gain a first hand understanding of the issues affecting businesses around the globe. This year we had over 4300 respondents, in five global regions, spanning 32 countries. Let's explore the highlights of this year's survey...
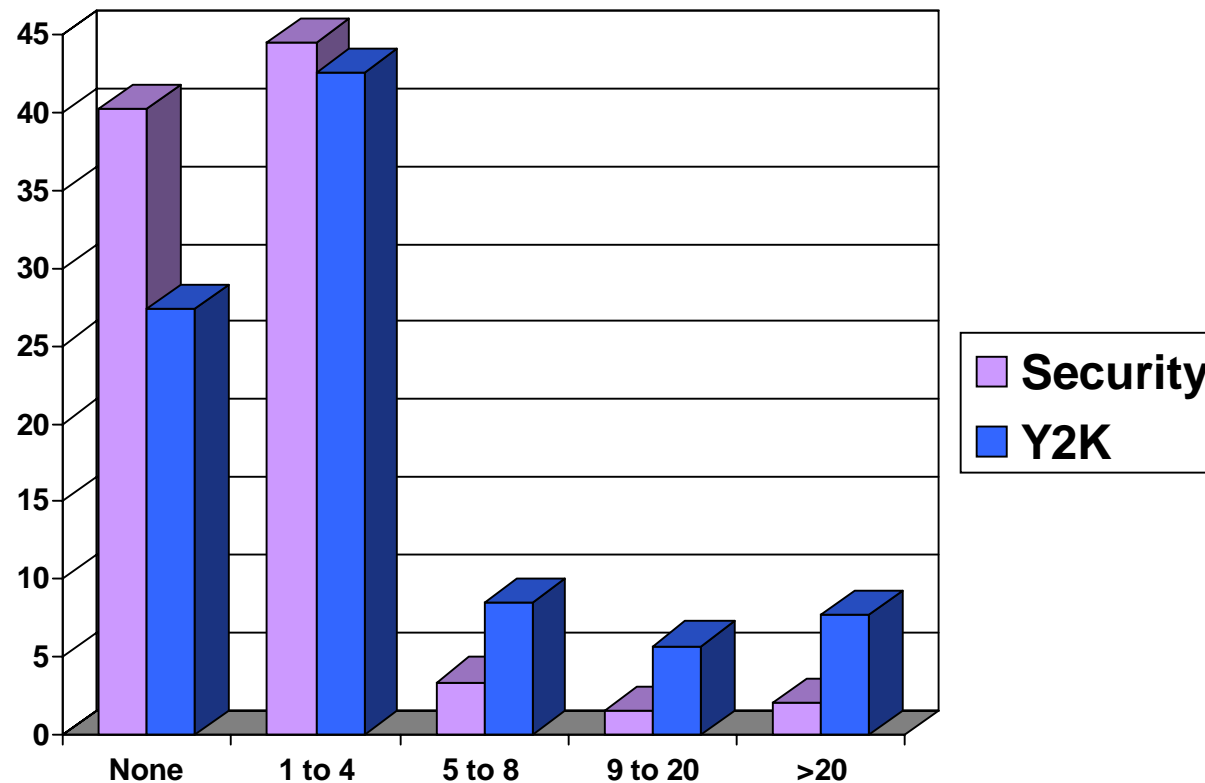
Key Issues --

- Y2K concerns take center stage

- Upper Management commitment to security grows

- Use of security monitoring countermeasures declines

- Internet connectivity continues to grow at rapid rates

- eCommerce utilization is slow primarily due to security
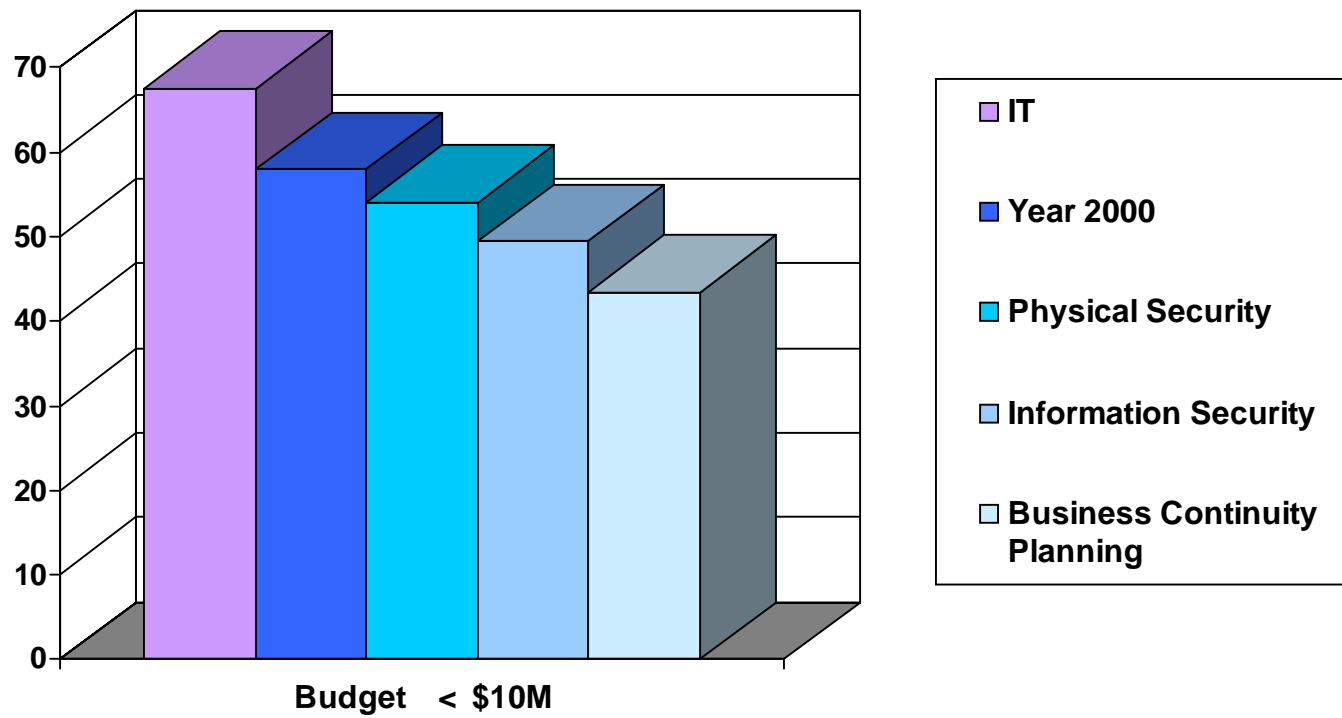 fears, but outlook is promising for the near future

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Year 2000 concerns are at the forefront of the business community. Budgets and headcounts are driven by the 'readiness' factor. …security runs a distant second.
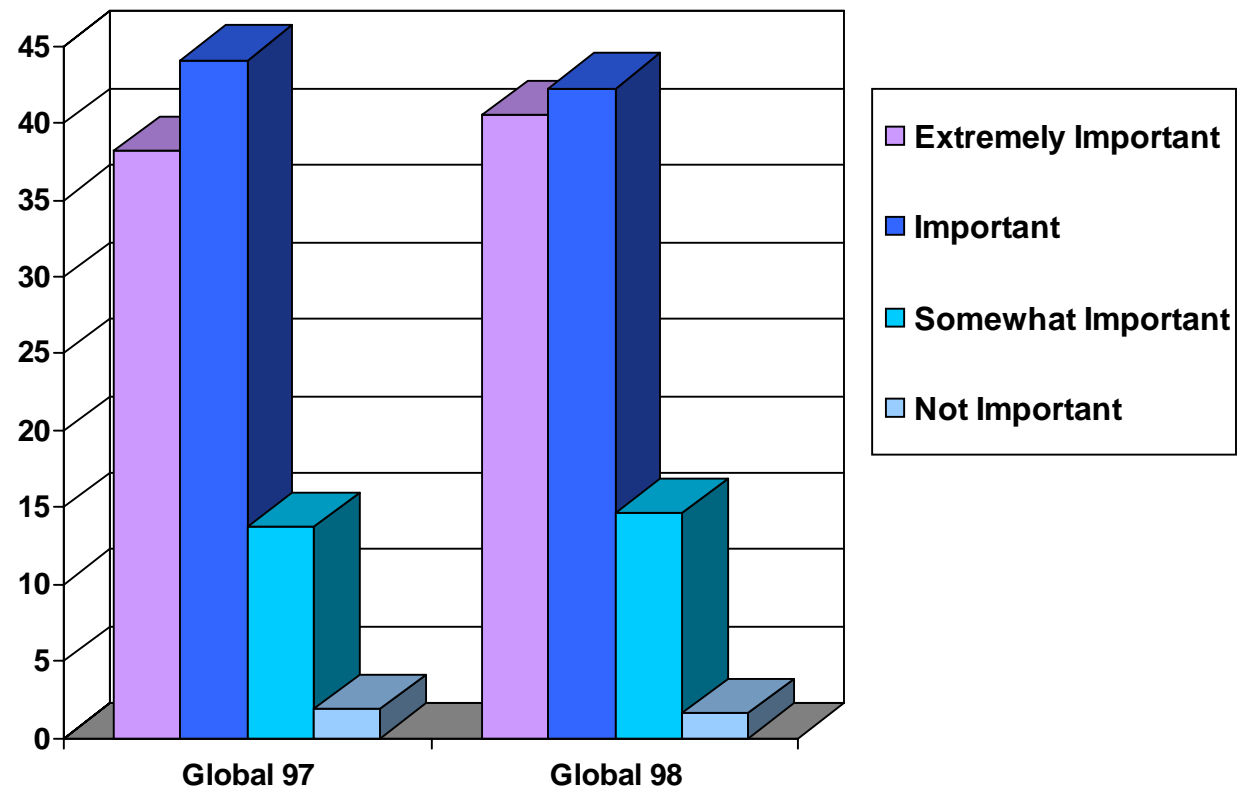
Full-time headcount figures

Security
Y2K

None | 1 to 4 | 5 to 8 | 9 to 20 | >20

ref: Q15A & E

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Annual Budget Focus

Budget   < $10M

Legend:
- IT
- Year 2000
- Physical Security
- Information Security
- Business Continuity Planning

ref: Q23A-E

A combined 82% of top management reportedly views IT security as 'extremely important' or 'important'.
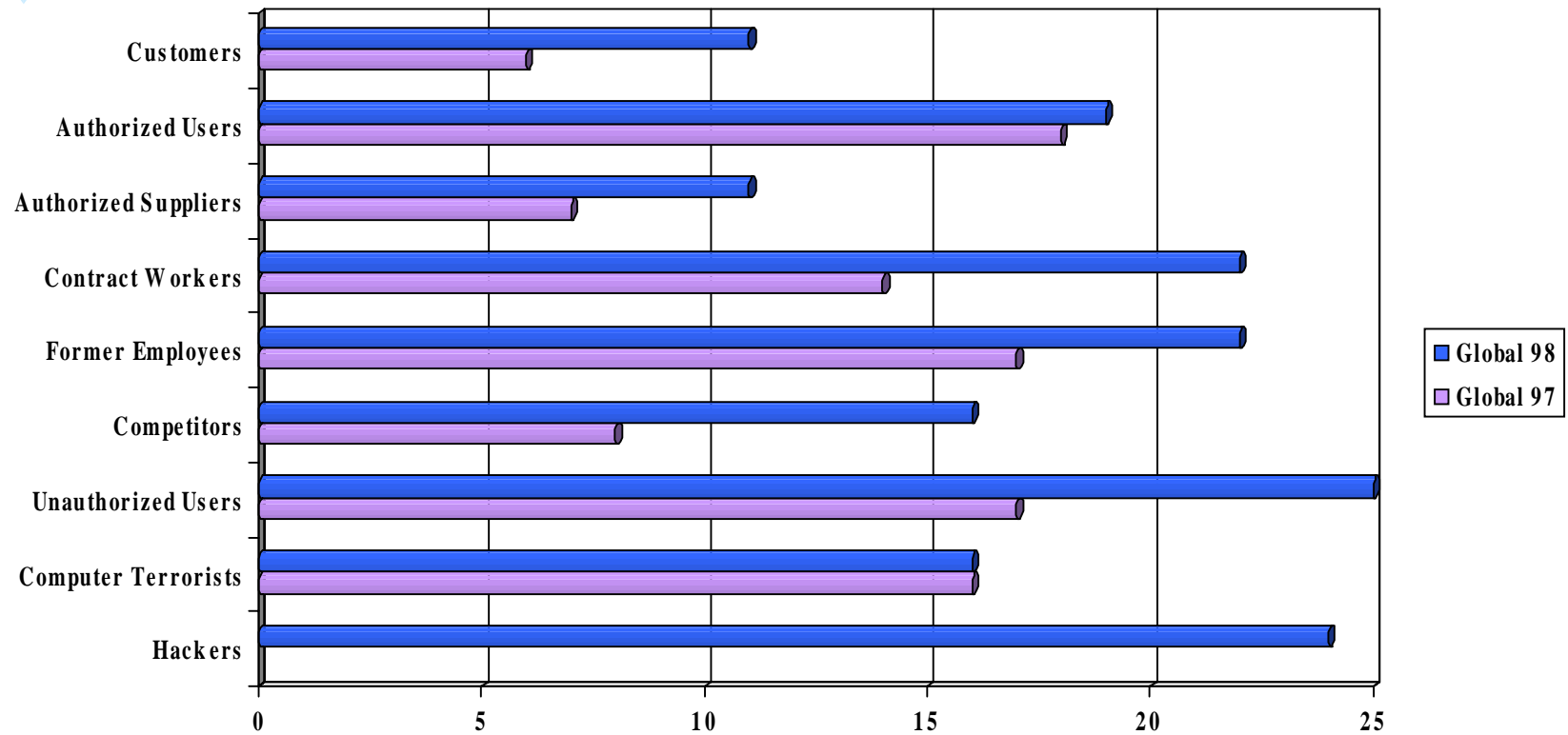

ref: Q01

The traditional 'hacker' and unauthorized user remains the most common threat, however distinguishing between external and internal attacks is becoming increasingly difficult. In fact, threats related to contract workers, authorized suppliers, customers, and competitors rose significantly. Our findings indicate that the type of countermeasure being utilized is varied, but globally their use in monitoring internal electronic activities is in decline.
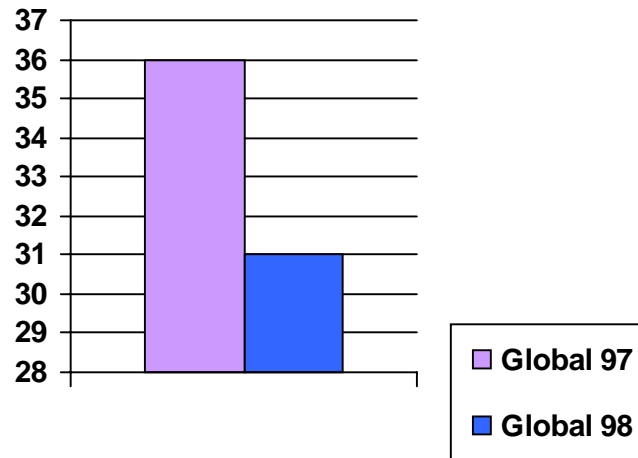
Levels of Threats are up, particularly among external users...

Categories (top to bottom): Customers, Authorized Users, Authorized Suppliers, Contract Workers, Former Employees, Competitors, Unauthorized Users, Computer Terrorists, Hackers

Legend:
- Global 98
- Global 97

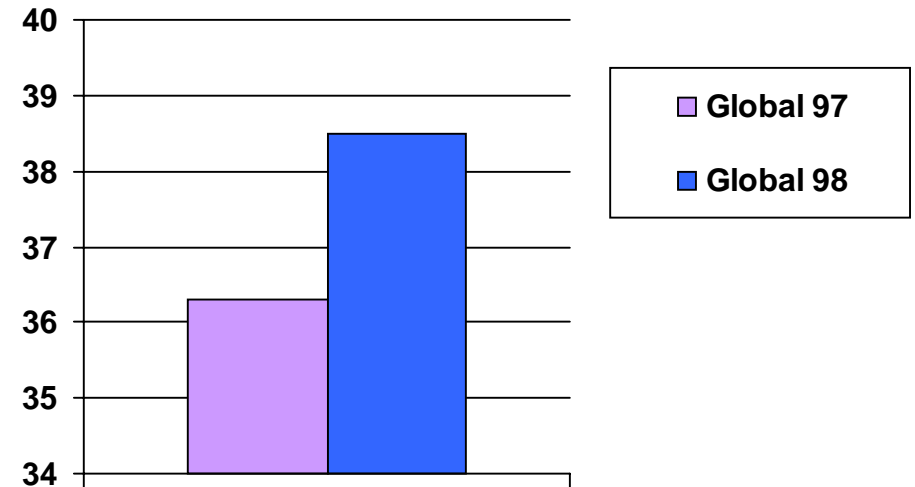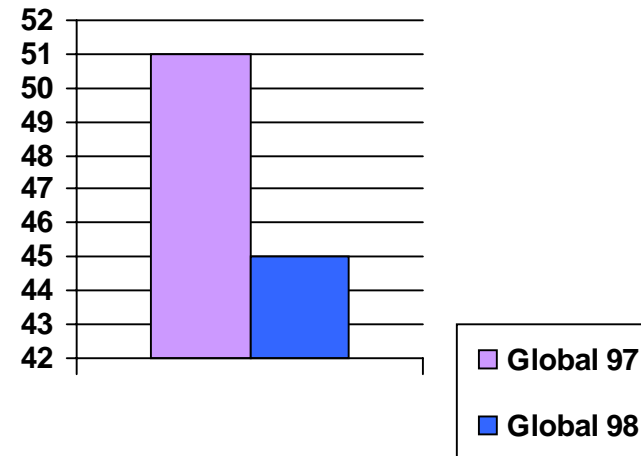X-axis: 0, 5, 10, 15, 20, 25

ref: Q21A-J

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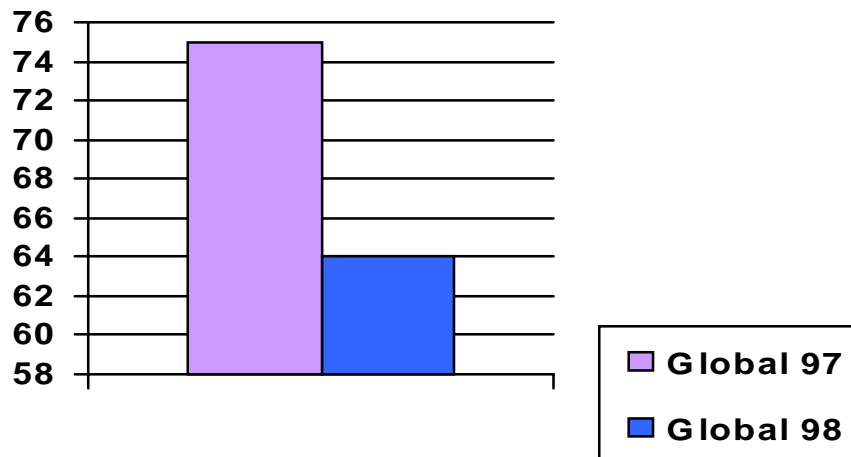*...yet due diligence in monitoring is down...*

The number of respondents actively monitoring business partner connections for security incidents has decreased by 5% since last year

The number of respondents not actively monitoring for network incidents has increased by 2% since last year

Global 97
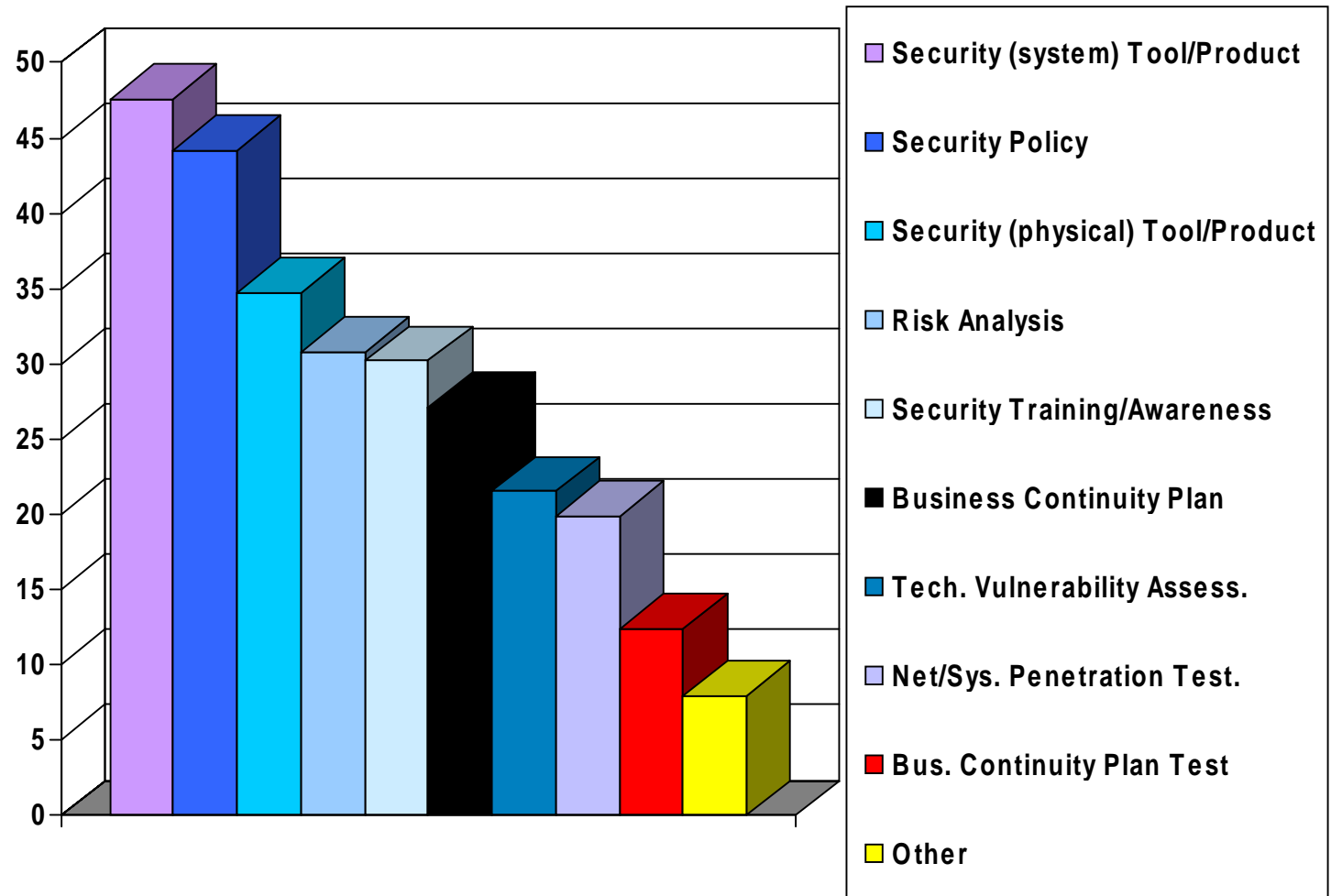Global 98

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6% fewer respondents feel
monitoring user compliance
is very important

Global 97
Global 98

Global 97
Global 98

The number of respondents with an incident
response plan has dropped 11% since last year

ref: Q34 & Q20E

Countermeasures in use

Legend:
- Security (system) Tool/Product
- Security Policy
- Security (physical) Tool/Product
- Risk Analysis
- Security Training/Awareness
- Business Continuity Plan
- Tech. Vulnerability Assess.
- Net/Sys. Penetration Test.
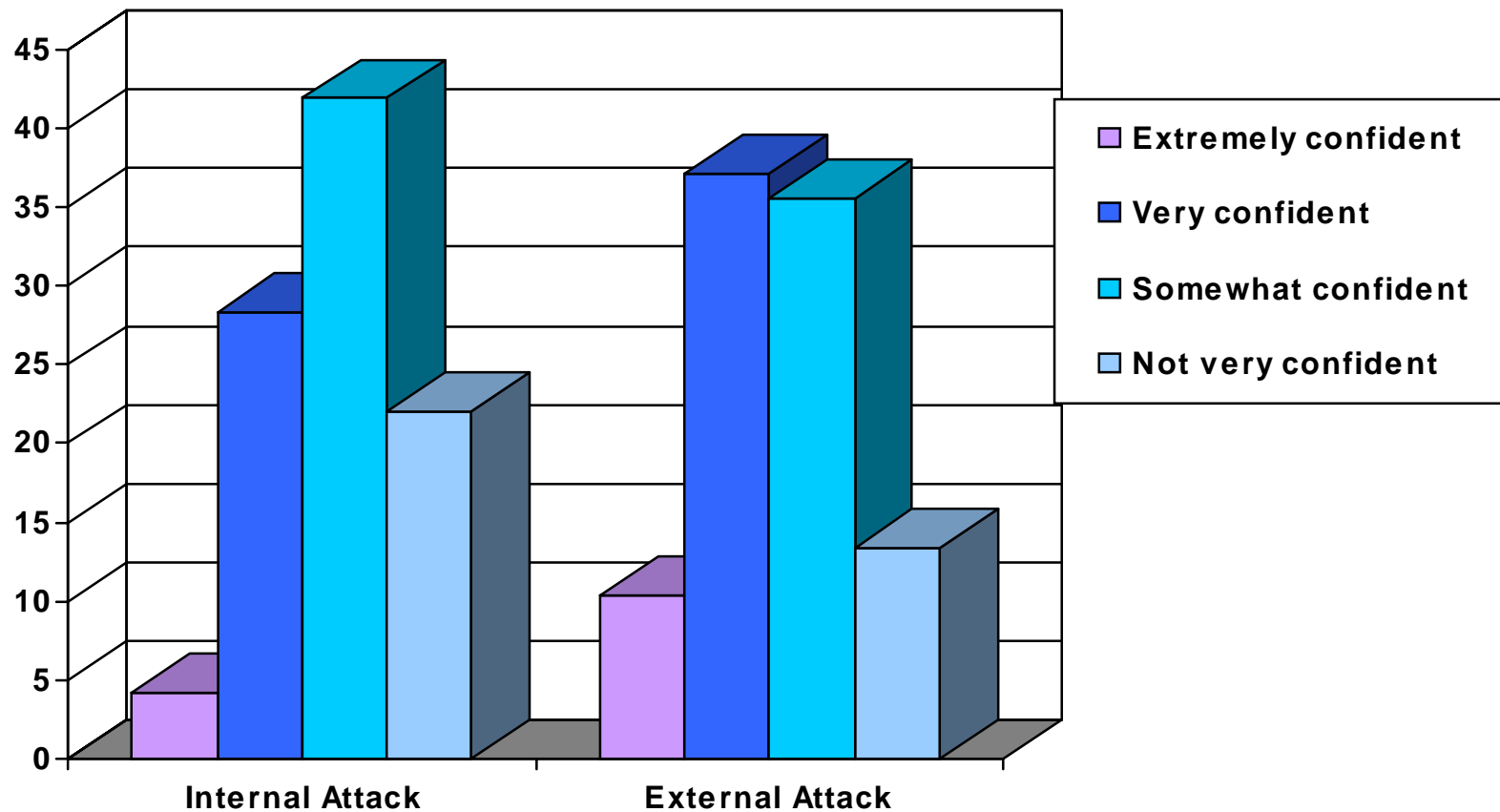- Bus. Continuity Plan Test
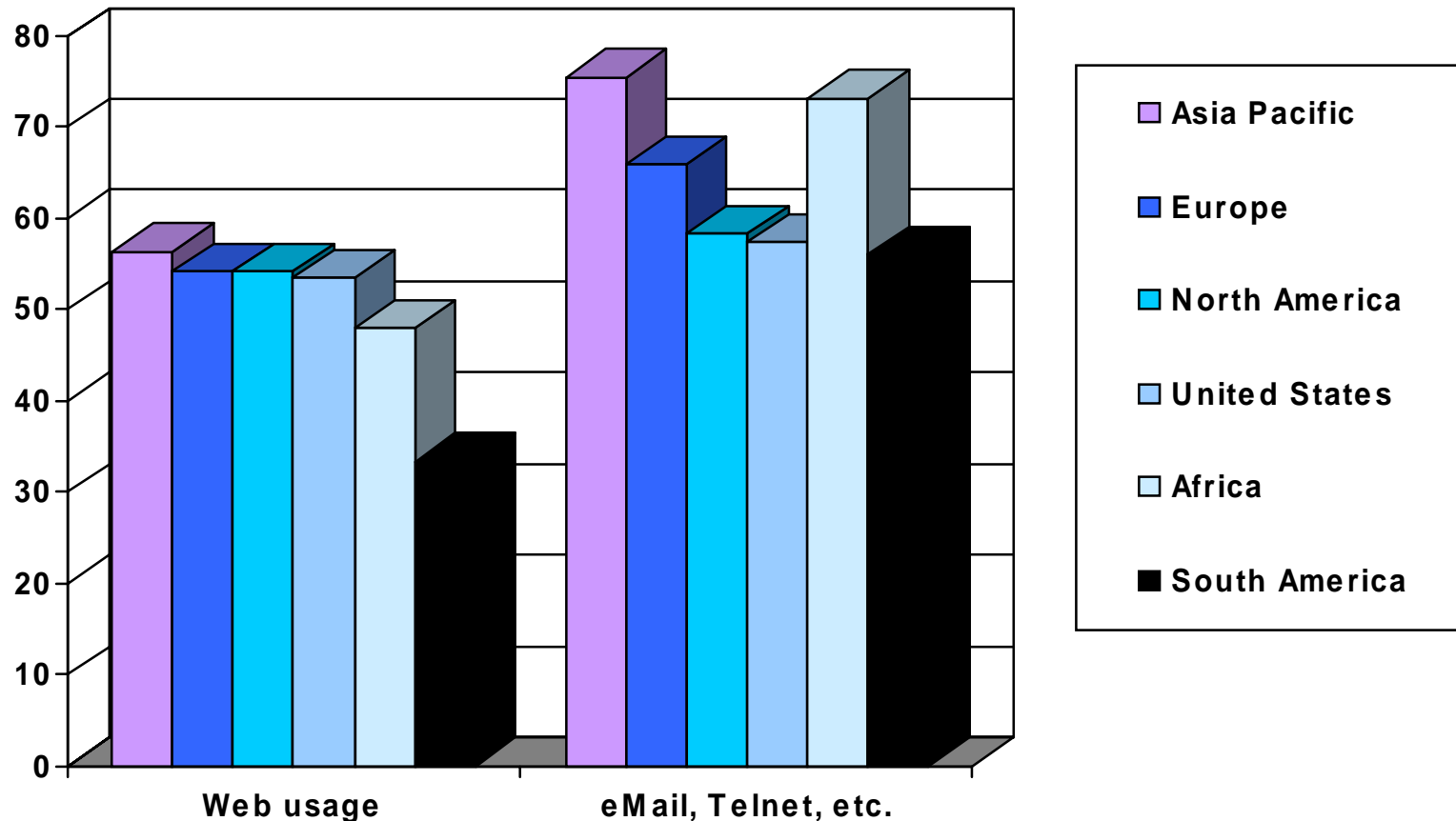- Other

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ref: Q02

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With the increased use of available security tools, monitoring technologies, and the belief that client server systems are more robust, organizations have become suspiciously more confident in their ability to prevent security breaches.

Legend:
- Extremely confident
- Very confident
- Somewhat confident
- Not very confident

Categories: Internal Attack, External Attack
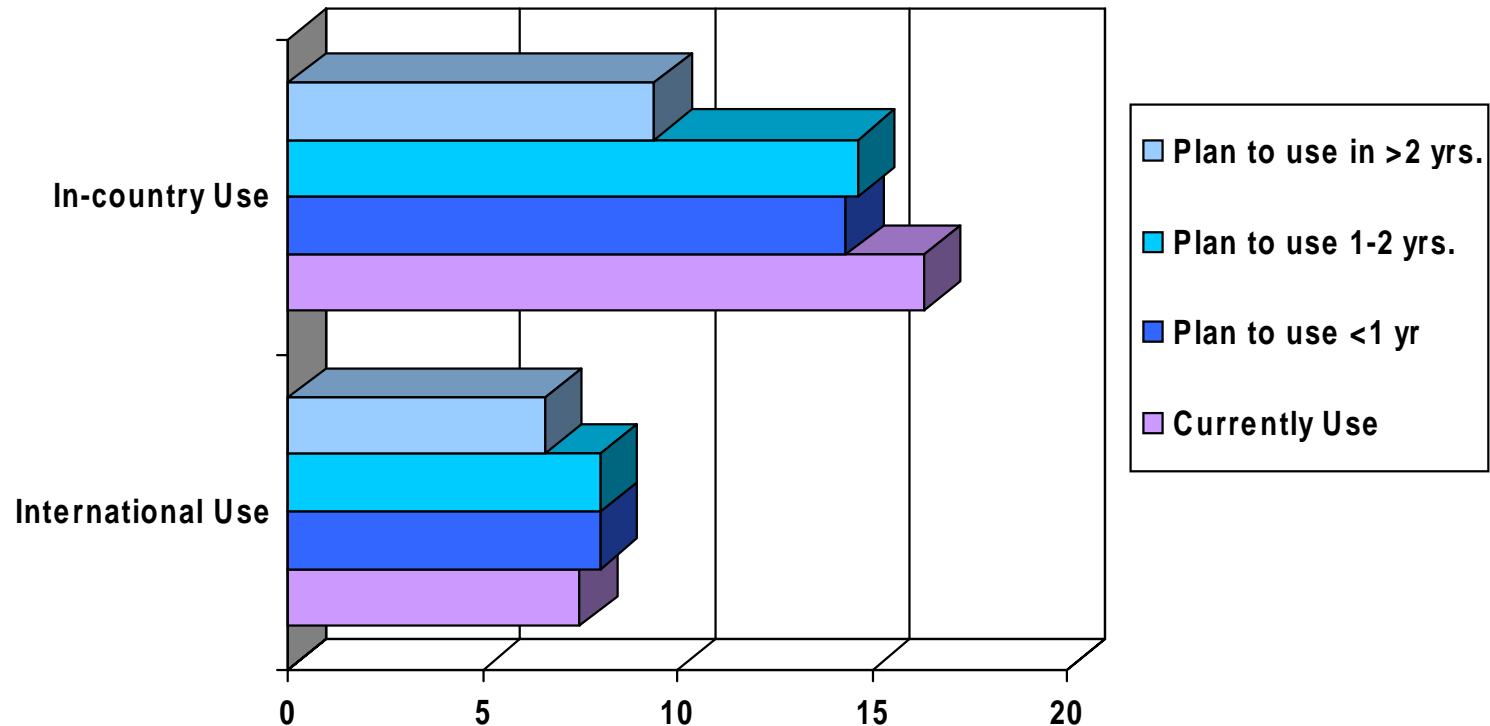
ref: Q35 & Q36

When organizations are confident that the turn of the century no longer poses a date threat, their attention will once again focus on the issue of information security. By that time, the use of the Internet may have reached far greater levels.

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Legend:
- Asia Pacific
- Europe
- North America
- United States
- Africa
- South America

Categories: Web usage, eMail, Telnet, etc.

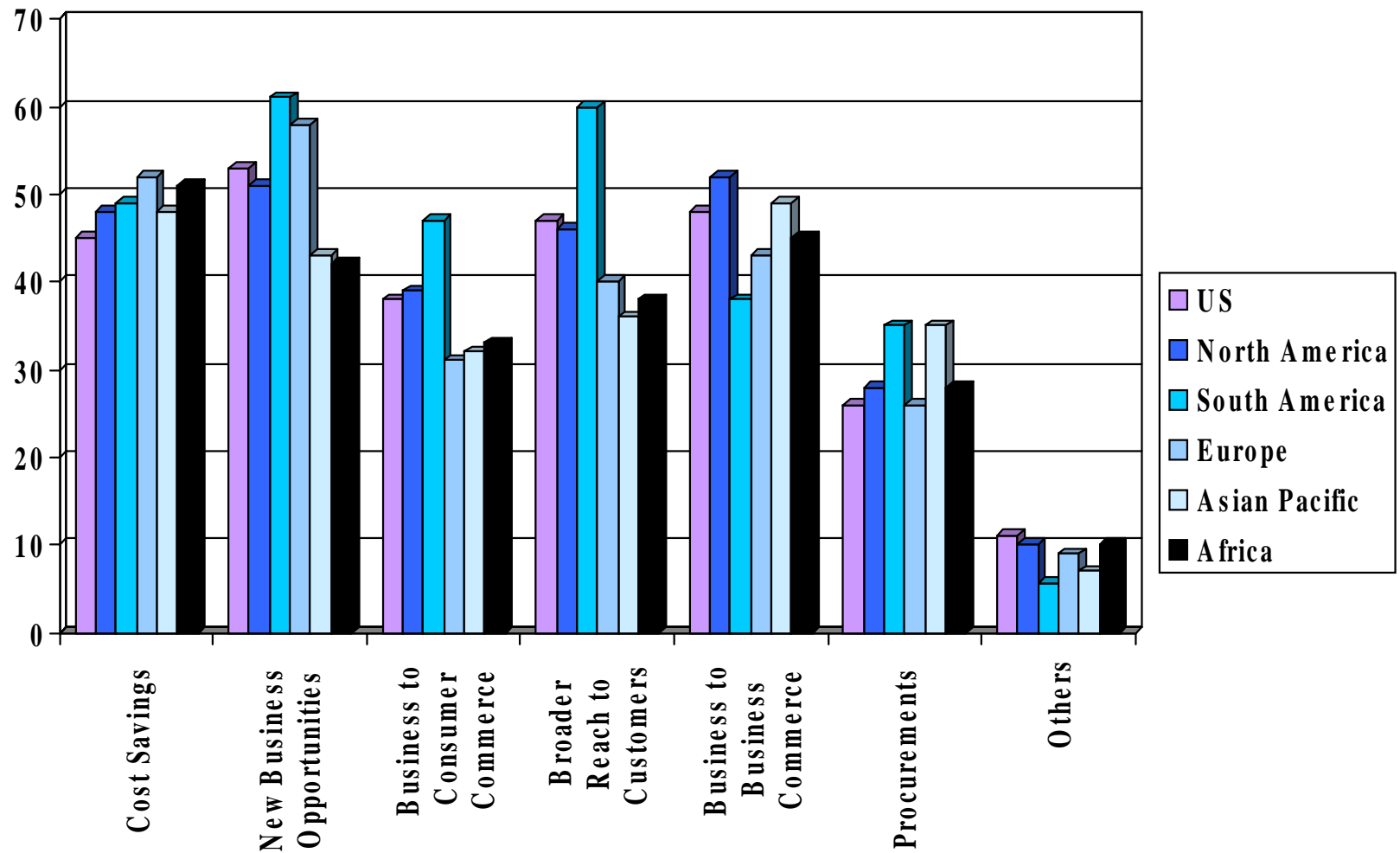On Average, 88% of the countries surveyed are connected to the internet

ref: Q27A-B

While less than 8% of those surveyed use the Internet for eCommerce, interest in the technology remains high.
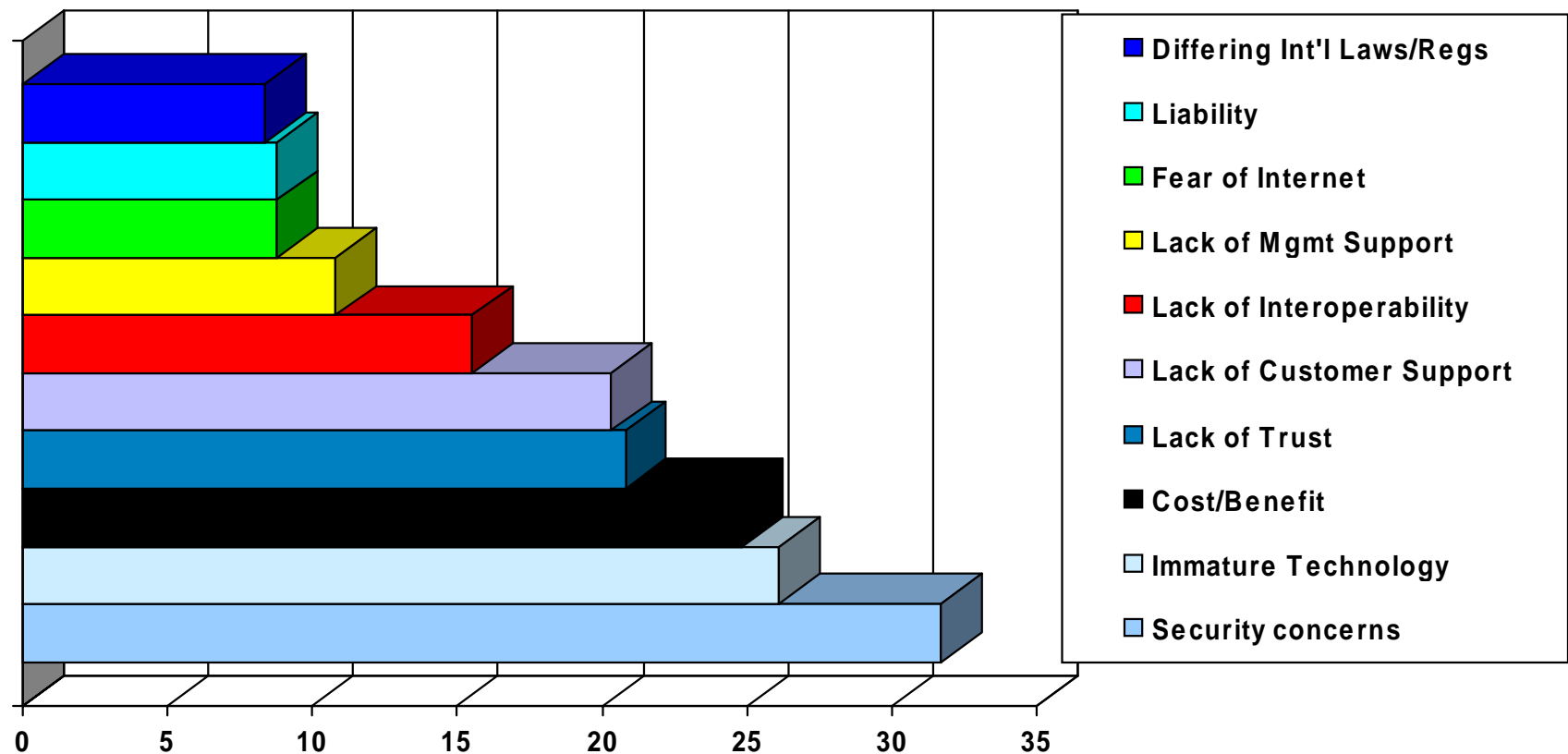
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In-country Use

International Use

Plan to use in >2 yrs.

Plan to use 1-2 yrs.

Plan to use <1 yr

Currently Use

0   5   10   15   20

ref: Q37A-B

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Many regions are currently capitalizing on this solution to improve the efficiency of business operations...

Legend:
- US
- North America
- South America
- Europe
- Asian Pacific
- Africa

Categories:
- Cost Savings
- New Business Opportunities
- Business to Consumer Commerce
- Broader Reach to Customers
- Business to Business Commerce
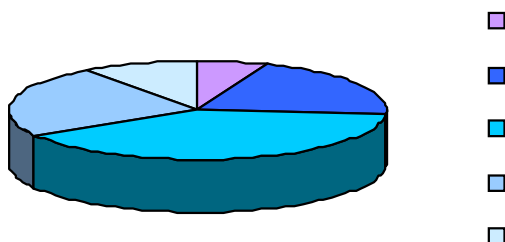- Procurements
- Others

ref: Q38

...However, despite the interest in eCommerce solutions, the barriers to enterprise-wide implementation remain high. For example, 32% of respondents report security to be the main obstacle when considering eCommerce utilization. If the security infrastructure reaches a manageable point, eCommerce opportunities are endless.
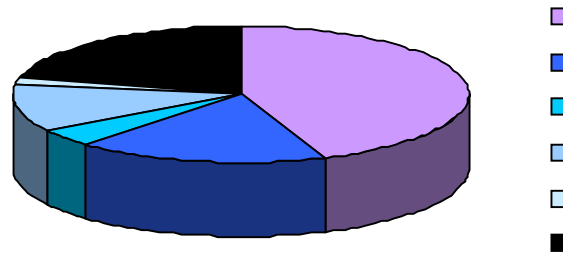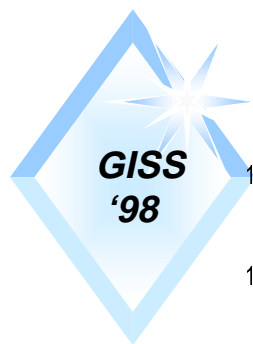

Legend:
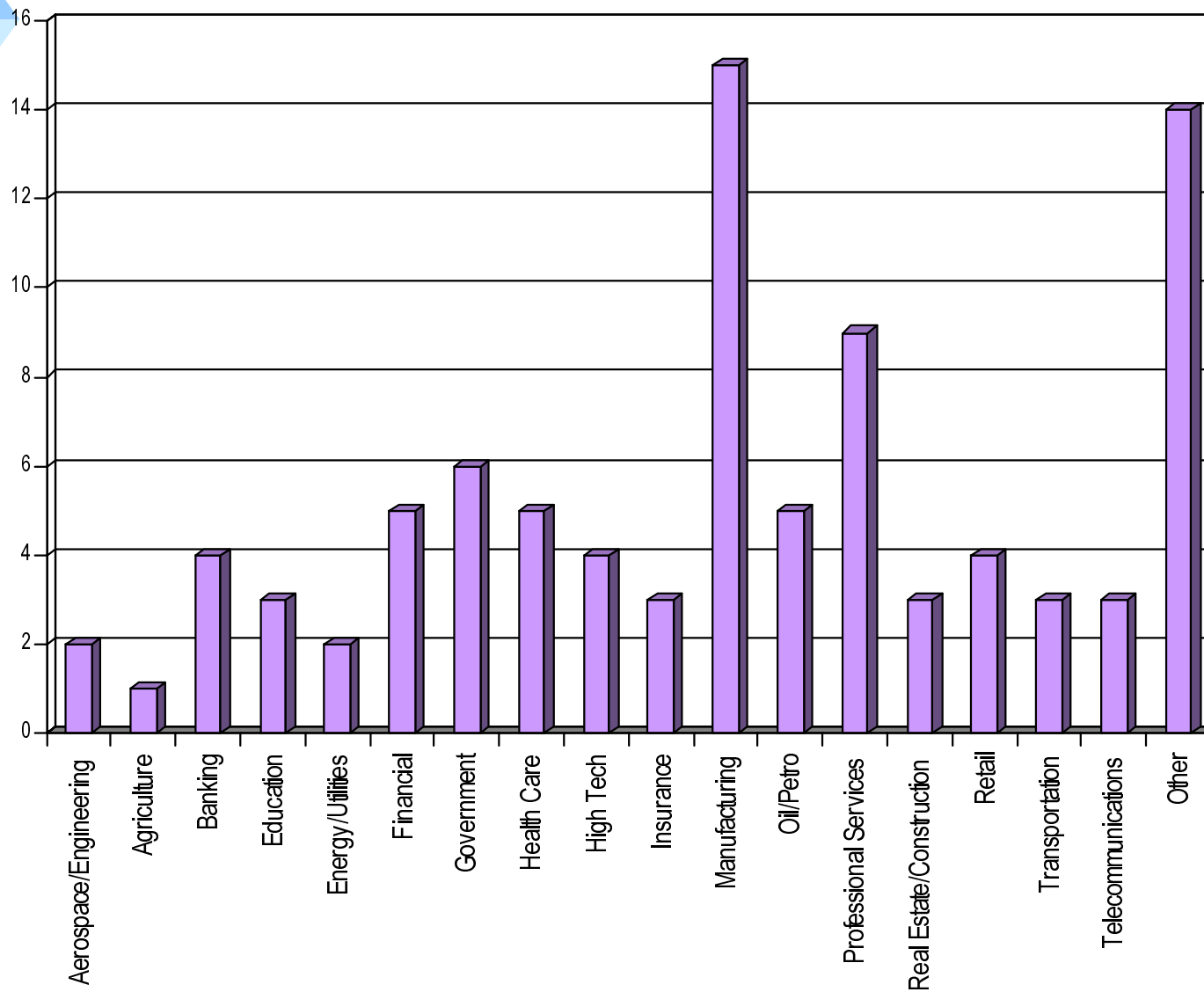- Differing Int'l Laws/Regs
- Liability
- Fear of Internet
- Lack of Mgmt Support
- Lack of Interoperability
- Lack of Customer Support
- Lack of Trust
- Cost/Benefit
- Immature Technology
- Security concerns

X-axis: 0, 5, 10, 15, 20, 25, 30, 35

ref: Q39

Participation by region

Respondents by job titles

Respondents by industry

ref: Q54

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Conclusion...

Despite the industry's current preoccupation with Y2K, indications are clear that businesses will soon be looking to information security as the next area of focus. The search will continue for cheaper and more efficient ways of using the internet for both national and international business. With organizations' likelihood of turning to outsourced security solutions, and eCommerce fitting the needs of the global economy, information security is charting a course to the 21st century.