Cable Operators Target SMBs With Managed Security Services

EXECUTIVE SUMMARY

Security threats to networks are proliferating at a staggering rate as networks become more complex. Attack vectors change constantly, multiplying exponentially and demonstrating increasingly impressive levels of their own brand of creativity. The rate of threatening change seems only to accelerate. Keeping network offerings up to date and relevant to ever-changing challenges as malefactors gain increasing knowledge and sophistication is a continuous struggle for service providers. Security is becoming a driving force for most organizations, large and small, with threats becoming ever more challenging and "keeping up with the bad guys" a central future task, a huge chore for businesses for which network security is not a primary expertise, particularly smaller ones without significant IT departments. The growing complexity of security problems is driving business customers increasingly to search out help.

Managed security services incorporate a wide range of activities, though MSOs generally have until now limited what they do internally, typically leaving more complex tasks to the market's recognized leaders, including specialist dedicated managed security services provider (MSSP) companies, prominent vendors and major carriers. Managed security services broadly include: consulting; 24/7/365 monitoring; perimeter threat management, including management of firewalls (the basic security appliance) and intrusion detection systems (IDS), along with end-point security (re: mobile access), security information and event management (SIEM), involving real-time analysis and proactive risk notification; emergency response capabilities, prominently including distributed denial-of-service (DDoS) protection; compliance monitoring, including Payment Card Industry Data Security Standard (PCI) in regards to credit/debit card processing; vulnerability assessment, including penetration testing, oversight of patch management and upgrades, as well as security assessments; audits; and periodic reports.

SMBs broadly remain the MSOs primary business customers. Despite recent efforts to move up market, MSOs still have much greater shares of smaller customers. These smaller organizations generally lack resources and IT know-how to cope successfully with escalating security threats, and they often prefer their providers to take over these responsibilities. Mid-market customers urgently look for solution providers as partners to deal with the escalating complexity of the networking environment, including security.

While so much is changing – with the virtual shadow of software-defined networking (SDN), network functions virtualization (NFV) and beyond hanging over the market environment – the fundamentals of what service providers actually do on-premises in regards to security have not changed that much. Typically, an MSS team shows up physically, sets up a device...
(typically firewall or unified threat management [UTM] appliance), connects that appliance to its network, ensures it’s operational and then turns over jurisdiction to the network operations center (NOC)/security operations center (SOC) that manages devices for customers. As customers get larger, they will often want more complex UTM devices rather than the simpler firewall and a growing variety of other technologies in their security packages.

**Cable Operators Target SMBs With Managed Security Services** examines the current state of MSO efforts in managed security in North America. It assesses MSO MSS strategies, and also examines major market trends and issues, including MSO strengths, obstacles to growth and the roles of partnerships. Further, it defines the most significant components of managed security services, and profiles several significant North American cable companies in relation to their activities in the managed security services market.

**VIEW COMPANIES COVERED**

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There will be more relationships between MSOs and the security market's leaders, as well as with a broad range of hardware and software developers. Partnerships of various kinds can make sense to MSOs looking at the costs of building up similar capabilities internally. One answer, especially for MSOs concerned about losing customers without a strong security story, can be the Rogers approach of comprehensive partnership with a major security specialist.

**Cable Operators Target SMBs With Managed Security Services** is published in PDF format.