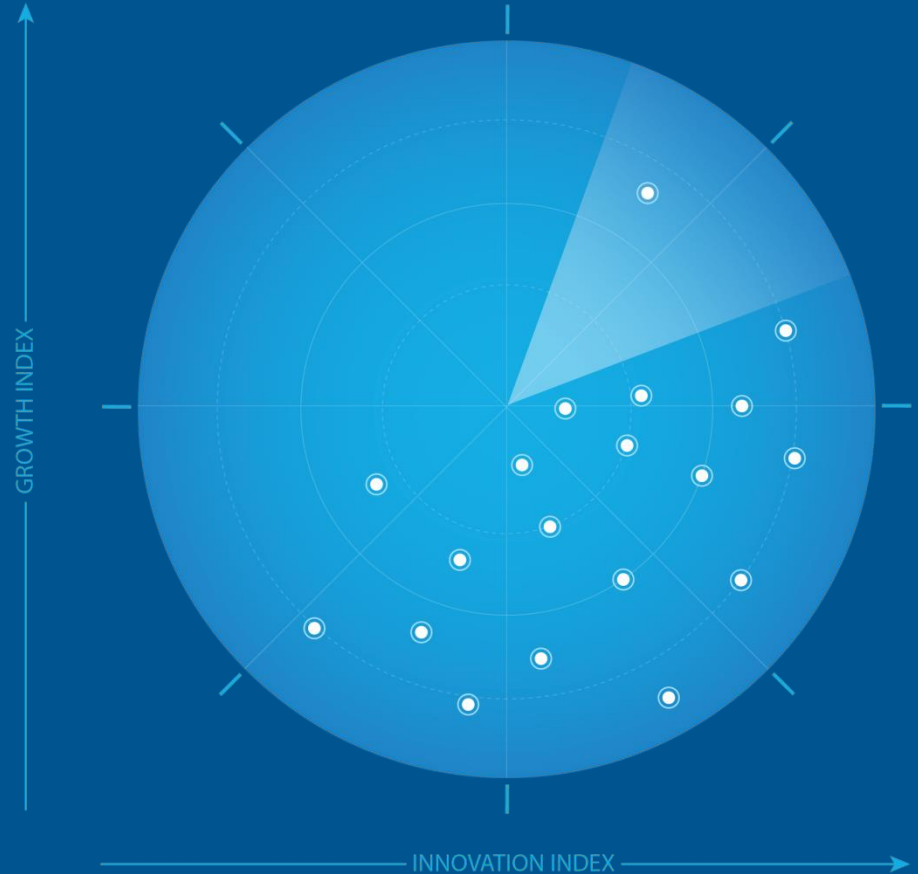


# Frost Radar™: Digital Intelligence Solutions, 2021

A Benchmarking System  
to Spark Companies to  
Action - Innovation that  
Fuels New Deal Flow and  
Growth Pipelines

Global Security Research Team at  
Frost & Sullivan



**K68F-23**

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# Strategic Imperative and Growth Environment



# Strategic Imperative

- Over the last decade, the security industry touted the ongoing convergence between the typically separate realms of physical, logical, and cyber solutions that would soon become packaged offerings for complete, end-to-end security operations. Despite the rise of IT integration, introduction of Internet of Things (IoT) devices and connectivity, and growth of physical security information management (PSIM), security operations center (SOC), and security information and event management (SIEM) solutions to create supposed single-pane-of-glass security solutions, significant coverage gaps remained and operators still found that they were blind to intelligence that crossed between the various systems.
- Increasing connectivity across security systems also has exposed more attack surface within an organization, particularly if the systems are connected through basic integrations and are not used to the attack vectors typical in more IT-based solutions. This can lead to security teams leaving systems vulnerable to intrusion simply to gain additional security function.
- Integration among security teams has remained a challenge throughout security operations for decades. While connectivity across IT, physical, and organizational systems was touted as a means to bring about more integrated security operations, it has only led to more restrictive silos among security systems, possession challenges over data and data sets, and an inter-team rivalry for resources, budget, and new technology procurement.
- Without a truly holistic approach to integrated security that can deal with more diverse, multi-vector attack types, security teams will quickly find themselves in the dark and outmanned against potential threats.

Source: Frost & Sullivan

# Strategic Imperative (continued)

- While security convergence has remained a buzzword throughout the industry, it is only within the last 5 years that the capabilities have started to prove operationally possible. However, a new approach to an organization's security operations and the retirement of the siloed, legacy security systems will be required in order to provide operators with the visibility and real-time intelligence capabilities they have sought.
- Digital intelligence, while traditionally thought of as the same as analytics, has evolved in the last few years beyond analytics to varied data sets, intelligence gathered from devices and sensors, and integration with open source and internal databases. The multitude of data types, systems, and solutions that are providing this information goes beyond physical or cyber security systems and requires a new approach to real-time security operations and investigation.
- Digital intelligence solutions utilizing an open-source, single-pane-of-glass view into all security technology (no matter the operational focus) had only just begun to garner interest when response to the COVID-19 pandemic accelerated it. With so many organizations now looking for remote, real-time access to all systems, the delicate balancing act that they had to perform between safety, security, and operational continuity required foundational intelligence only available through these newer solutions.

Source: Frost & Sullivan



# Growth Environment

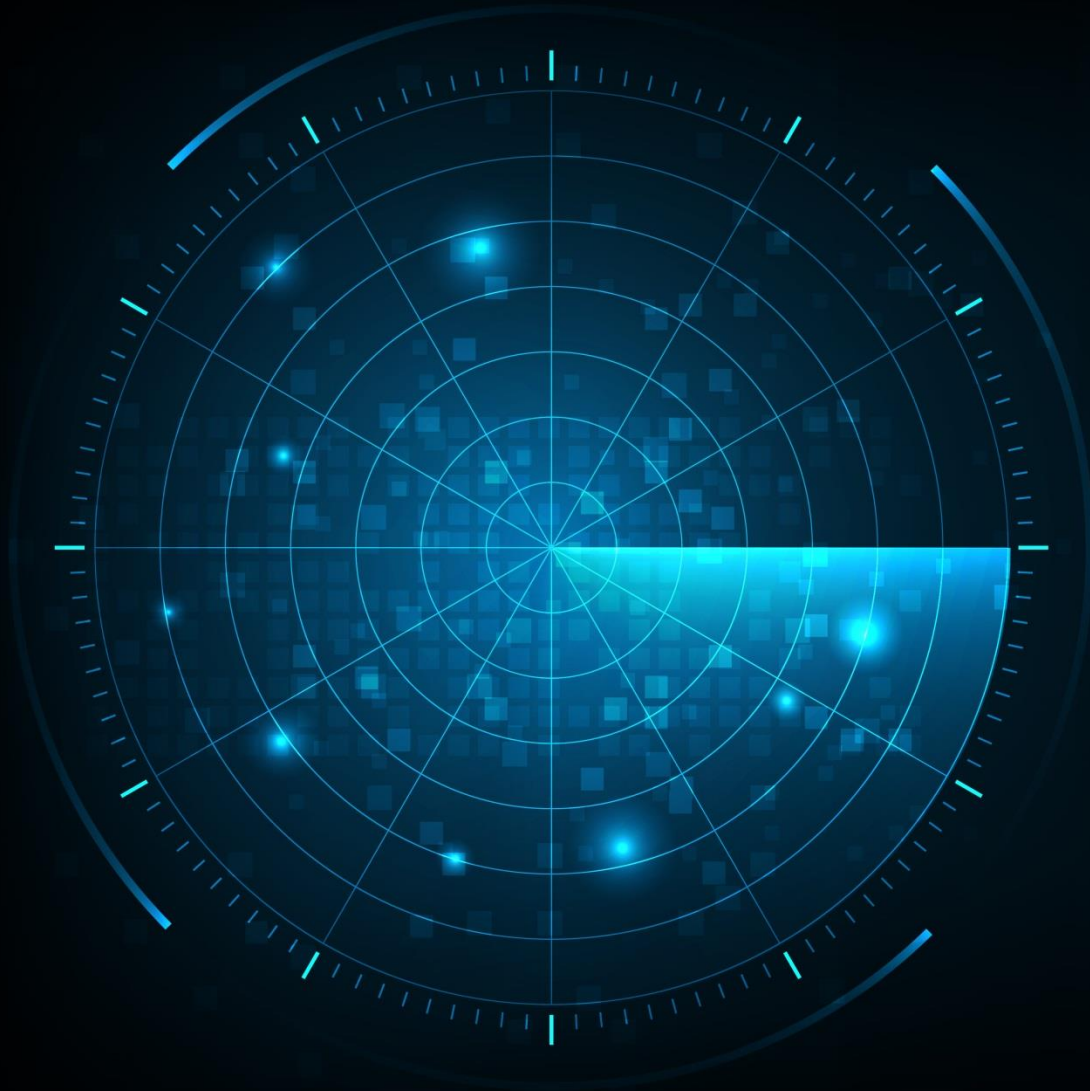
- Albeit a growing space in the broader security industry, the global digital intelligence solutions market witnessed spending of about \$12.4 billion in 2020 with the transition of legacy analytics solutions to more comprehensive digital intelligence programs and the rapid uptick in new solutions to help with data intelligence practices throughout the COVID-19 pandemic response. Frost & Sullivan expects global market spending to reach \$26.8 billion by 2030 (an 8.0% compound annual growth rate) due to legacy systems upgrading their analytics, new solutions coming online because of increased digitalization, and organizational and governmental partners investing more heavily in intelligence-rich systems versus piecemeal point solutions.
- Differentiated from predecessor solutions (SIEM solutions in cybersecurity and PSIM solutions in physical security), comprehensive digital intelligence systems rely on multiple capabilities from various security realms, including:
  - Information from multiple data types, media and intelligence sources, and varied sensors aggregated in a readable format.
  - Open integration to allow for seamless data aggregation, dissemination, classification, and analysis.
  - The ability to program operational security protocols to meet regulatory, privacy, and organizational requirements around data usage, collection, and storage.
  - Real-time visibility into current operational systems and devices, potential threat vectors and incidents, and event mitigation capabilities.

Source: Frost & Sullivan

# Growth Environment (continued)

- While the digital intelligence solutions market remains high-growth, there is still some nascence by customer vertical. Banking and financial services and law enforcement customers are quickly adopting these solutions in order to keep pace with digitalization trends throughout their security operations and in response to the COVID-19 pandemic. Law enforcement agencies, for example, had to move quickly to adopt more intelligence-driven activities for efficiency and safety during the pandemic.
- Niche opportunities remain available in retail and enterprise customer environments that are resource-strapped, intelligence-hungry, and eager to synthesize their security operations, but they are still more reactive and not matured enough to be included in general market sizing. This could quickly change given the fast growth in the space.
- Frost & Sullivan study related to this independent analysis:
  - [Global Digital Intelligence Growth Opportunities](#)

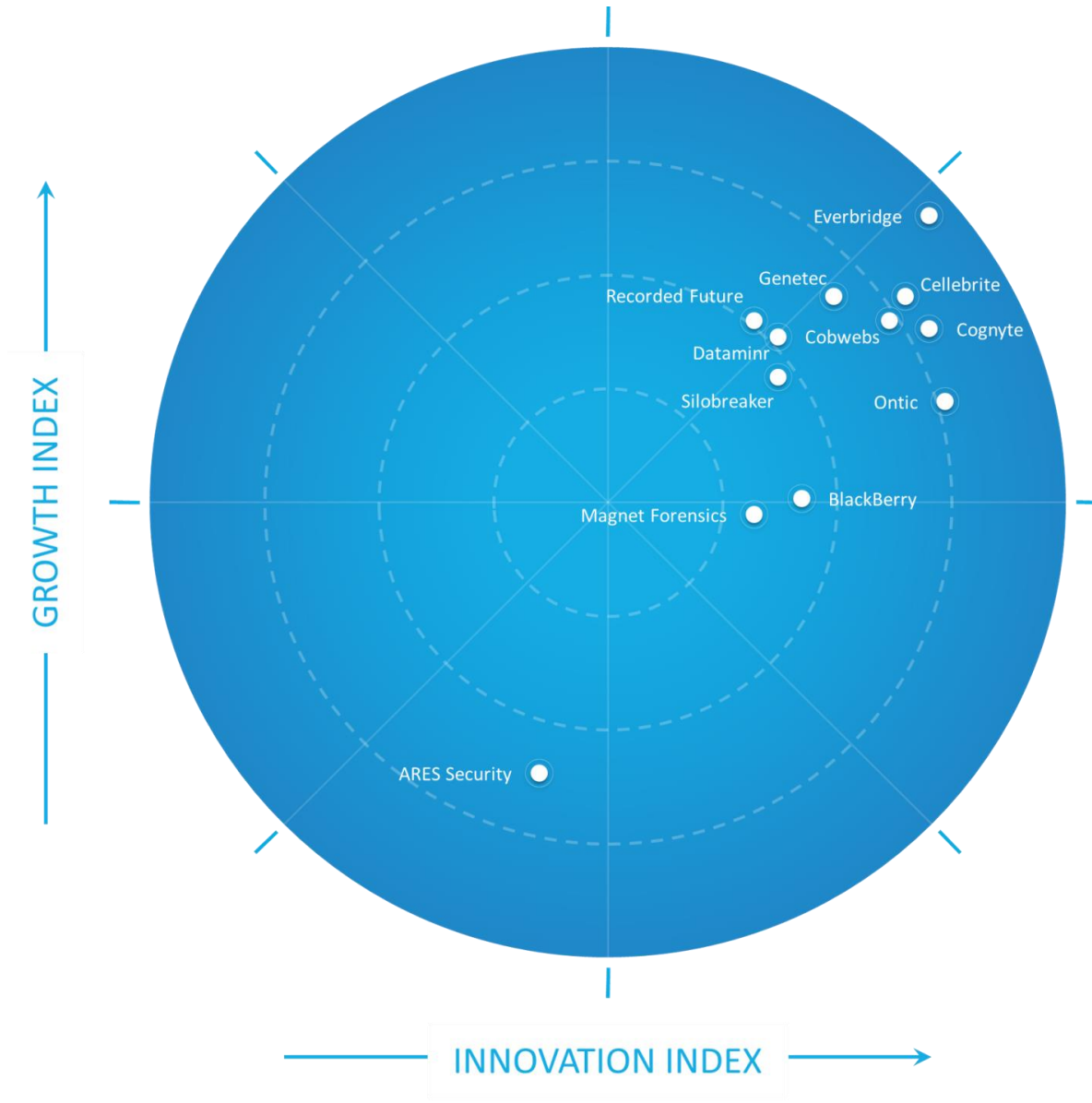
Source: Frost & Sullivan



**Frost Radar™**

**Digital Intelligence  
Solutions**

# Frost Radar™: Digital Intelligence Solutions Market



Source: Frost & Sullivan



## INNOVATION

- Ontic's Protective Intelligence Platform is one of the most comprehensive intelligence solutions available that can tackle an organization's physical, digital, and operational security needs across all systems and employees. By offering its suite of data, investigation, and technology integrations across the enterprise, Ontic's platform enables security teams to take a more proactive approach to their strategies.
- With its customized API structures, intelligence engine, and dozens of open source intelligence partners, Ontic's Protective Intelligence Platform offers context-rich intelligence regarding incidents in progress or under investigation and can be customized to fit particular governance, regulatory, and operational security needs.

## GROWTH

- Ontic is seen as one of the major disruptors in the digital intelligence space and is one of the youngest vendors offering these solutions. Despite the company's relative youth, Ontic has achieved triple-digit revenue growth annually since its founding in 2017.
- With a continuous cycle of platform innovation and clear product roadmap for new capabilities and future cybersecurity integration, Ontic is able to compete with more established competitors on an almost-level playing field.
- Product innovation is critical for Ontic's performance in the market; the company is investing more than 45% of its annual revenue in R&D for the Protective Intelligence Platform.

## FROST PERSPECTIVE

- Ontic's Protective Intelligence Platform offers an in-depth intelligence solution that truly can meet any customer's needs. The customizable API and the ever-expanding partnerships with new intelligence and technology sources will enable Ontic to quickly capture market share and potentially form a blue ocean strategy for other digital intelligence vendors in newer customer verticals such as enterprise and retail applications.
- Even with its highly innovative solutions, Ontic remains a bit more unknown in the security industry because of its youth. Despite this, Ontic has proven that it can compete with more entrenched vendors in this market. Focusing its customer outreach strategies towards these competitive comparisons can get Ontic's name into consideration and gain the attention of new customers.

Source: Frost & Sullivan

# Frost Radar™ Analytics



# Frost Radar™: Benchmarking Future Growth Potential

2 Major Indices, 10 Analytical Ingredients, 1 Platform

## VERTICAL AXIS

**Growth Index (GI)** is a measure of a company's growth performance and track record, along with its ability to develop and execute a fully aligned growth strategy and vision; a robust growth pipeline™ system; and effective market, competitor, and end-user focused sales and marketing strategies.

## GROWTH INDEX ELEMENTS

- **GI1: MARKET SHARE (PREVIOUS 3 YEARS)**  
This is a comparison of a company's market share relative to its competitors in a given market space for the previous 3 years.
- **GI2: REVENUE GROWTH (PREVIOUS 3 YEARS)**  
This is a look at a company's revenue growth rate for the previous 3 years in the market/industry/category that forms the context for the given Frost Radar™.
- **GI3: GROWTH PIPELINE™**  
This is an evaluation of the strength and leverage of a company's growth pipeline™ system to continuously capture, analyze, and prioritize its universe of growth opportunities.
- **GI4: VISION AND STRATEGY**  
This is an assessment of how well a company's growth strategy is aligned with its vision. Are the investments that a company is making in new products and markets consistent with the stated vision?
- **GI5: SALES AND MARKETING**  
This is a measure of the effectiveness of a company's sales and marketing efforts in helping it drive demand and achieve its growth objectives.

# Frost Radar™: Benchmarking Future Growth Potential

2 Major Indices, 10 Analytical Ingredients, 1 Platform

## HORIZONTAL AXIS

**Innovation Index (II)** is a measure of a company's ability to develop products/services/solutions (with a clear understanding of disruptive Mega Trends) that are globally applicable, are able to evolve and expand to serve multiple markets, and are aligned to customers' changing needs.

## INNOVATION INDEX ELEMENTS

- **II1: INNOVATION SCALABILITY**

This determines whether an organization's innovations are globally scalable and applicable in both developing and mature markets, and also in adjacent and non-adjacent industry verticals.

- **II2: RESEARCH AND DEVELOPMENT**

This is a measure of the efficacy of a company's R&D strategy, as determined by the size of its R&D investment and how it feeds the innovation pipeline.

- **II3: PRODUCT PORTFOLIO**

This is a measure of a company's product portfolio, focusing on the relative contribution of new products to its annual revenue.

- **II4: MEGA TRENDS LEVERAGE**

This is an assessment of a company's proactive leverage of evolving, long-term opportunities and new business models, as the foundation of its innovation pipeline. An explanation of Mega Trends can be found [here](#).

- **II5: CUSTOMER ALIGNMENT**

This evaluates the applicability of a company's products/services/solutions to current and potential customers, as well as how its innovation strategy is influenced by evolving customer needs.

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