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## ***Corporate Web Security Market Analysis, 2010-2014***

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### **SCOPE**

This study provides an analysis of the Corporate Web Security Market in 2010 and its potential growth over the next four years. It offers a detailed analysis of worldwide market trends, market size and growth forecasts, market share by vendor, vendor products and strategies, and more.

- The Web Security market is comprised of solutions that provide inbound and outbound security to business organizations, protecting against the myriad of threats that exist on the Internet today. These threats can include viruses, various forms of spyware, phishing attacks, and other types of malware.
- Solutions in this market can be deployed in multiple form factors, including software, appliances, and hosted models.
- The report focuses exclusively on corporate deployments, which include government and educational organizations, but does not include service provider deployments.

All market numbers, such as market size, forecasts, installed base, and any financial information presented in this study represent *worldwide* figures, unless otherwise indicated. All pricing numbers are expressed in \$USD.

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## METHODOLOGY

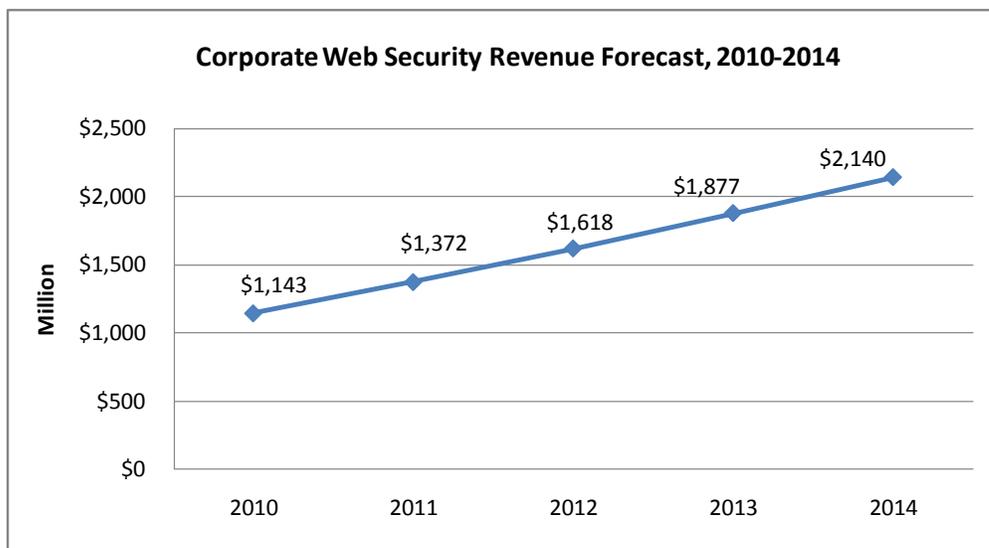
The information and analysis in this report is based on primary research conducted by The Radicati Group, Inc. It consists of information collected from vendors, and users within global corporations via interviews and surveys.

Secondary research sources have also been used, where appropriate, to cross-check the information collected. These include company annual reports and market size information from various market segments of the computer industry.

## EXECUTIVE SUMMARY

- Web Security is defined as any software, appliance, or hosted service that protects corporate users and networks from Web-based malware, helps prevent data loss, and enables organizations to control employee behavior on the Internet. In addition, Web Security solutions can also help reduce liability resulting from careless browsing, block inappropriate data from being uploaded or downloaded, as well as preserve corporate bandwidth for legitimate tasks.
- Most vendors and service providers offer a single solution for both malware and URL filtering problems (either in the form of software application, appliance, service, or a Hybrid solution). There are only a few vendors left today that still want customers to purchase these capabilities separately. On the other hand, additional capabilities, such as Data Loss Prevention (DLP), are still almost always offered for a separate fee.
- If in the past most companies were mostly concerned about protecting users from outside threats, today, we are seeing more interest in bi-directional solutions. Bi-directional solutions enable to not only stop incoming threats, but also prevent undesirable content from going out, including content produced by possible botnets and other infected applications.
- While some organizations are happy to block all social-related websites (such as Facebook), others need to allow users controlled access to such websites to network with their customers and partners, without exposing themselves to potential legal risks. Some of the latest content protection Web tools enable organizations to manage the type of applications users can see and access on each website, as well as what content they are allowed to post, as opposed to simply blocking the entire website.

- Among some of the more popular add-ons this year to Web Security solutions are Data Loss Prevention (DLP) capabilities, or electronic data supervision tools that enable organizations to prevent non-compliant activity from occurring (for instance by stopping sensitive content from going out, etc.) While DLP capabilities seem to be available with most Web Security solutions, customers shouldn't expect anything overly sophisticated. Most are home-grown add-ons, providing only basic protection by blocking specific applications from being used (IM, blogs, Wikis, Webmail, etc.), rather than offering deep content inspection. For more advanced content management, customers are usually advised to deploy a stand-alone full-featured suite from pure-play DLP vendors.
- Many players in the Web security market have a background in e-mail security. The surprising thing is that most of them still haven't integrated Web security capabilities with their e-mail security tools. However, we do expect this to happen over the next two years, as Web security protection will become more of a must, rather than a "nice to have" feature.
- Anticipating the demand for Hybrid Web Security solutions (combining on-premises filters with in the cloud services), over the past 12 months three SaaS Web security vendors have been acquired (*Barracuda* acquired *Purewire*, *Cisco IronPort* acquired *ScanSafe*, and *McAfee* acquired *MX Logic*). They all expect to unveil a hybrid solution for their customers within the next few months. Hybrid solutions are especially beneficial for larger organizations with multiple locations.
- The worldwide revenue for corporate Web security solutions is expected to grow from over \$1.1 billion million in 2010, to over \$2.1 billion in 2014.



**Corporate Web Security Market Revenue Forecast, 2010 – 2014**

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