



Research Excerpt from Frost & Sullivan's World Content Filtering Markets

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F R O S T  S U L L I V A N

Market Overview

- During the late 1990's through the early 2000s, the threat landscape was comprised of hackers who engineered exploits to breach corporate and government networks in the name of openness and fairness in the world. The primary attack vector was through email – luring users into opening file attachments that seemed harmless. These file attachments contained malicious payloads that would install via network backdoors and other exploits. The exploits would allow hackers access to computer and then into the network. Once in the network hackers would deface websites and expose proprietary data from file servers to hurt an organization's image or financial bottom-line.
- Over the past five years the threat landscape has evolved. Attackers have revised their methodology and tools in order to gain profit. The newest attacks not only exploit email vulnerabilities but focus on insecure web content.
- Web components are complex and written in a variety of languages. Users require these components to run a variety of platforms and in a variety of browsers. This wide variety of systems makes testing very difficult and there seems to be a constant stream of vulnerabilities discovered daily.
- Many websites strive to provide an interactive user experience by allowing end users to post their own content. This makes the security of the site questionable at all times as there is no guarantee that the end user content may be malicious.

Market Definitions

- Frost & Sullivan uses the term "content filtering" to refer to a trusted subsystem that enforces a security policy on the data that passes through it. Content Filtering can refer to both inbound and outbound requests for data points, verifying that the request is legitimate according to policy, and then allowing the request to complete or taking appropriate predefined action.
- Past content filtering reports only looked at inbound content filtering (web and email). This year's report also examined outbound content filtering and emerging filtering technologies such as: Instant Messaging (IM), Data Leakage Prevention, Internet Protocol, Voice Over Internet Protocol (VOIP) and Mobile Computing (Laptop, Personal Digital Assistant (PDA), Smart Phones).
- Content filtering vendors deliver their services in the form of software, appliances or managed services. Frost & Sullivan saw an increase in the managed service offerings from vendors in 2008.
- The majority of users are enterprises, though a small consumer segment exists, driven by parental control and anti-spam needs.

Scope Of Study

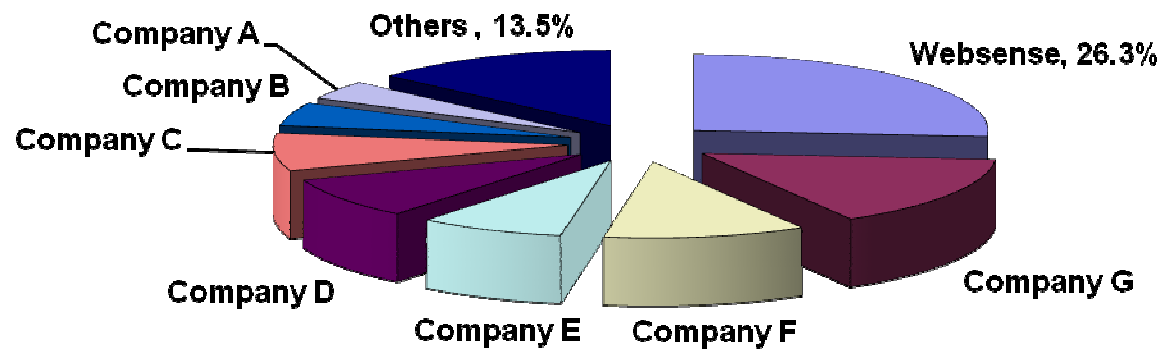
- **Geographical Region Covered: World**
- **Base Year for this research service is 2008 and the Forecast Period is 2009 to 2015**

Scope Of Study

- In this research Frost & Sullivan examines the current state of the world content filtering market, looking at drivers, restraints, market growth, pricing, distribution, technology and legislative trends.
- This study provides analysis of market demand, geographical trends, world and regional forecasts and provides an in-depth analysis of the competitive landscape which include vendors' market shares along with detailed profiles of the key vendors in the industry.

Market Share Analysis

Content Filtering Market: Market Share Analysis (World), 2008

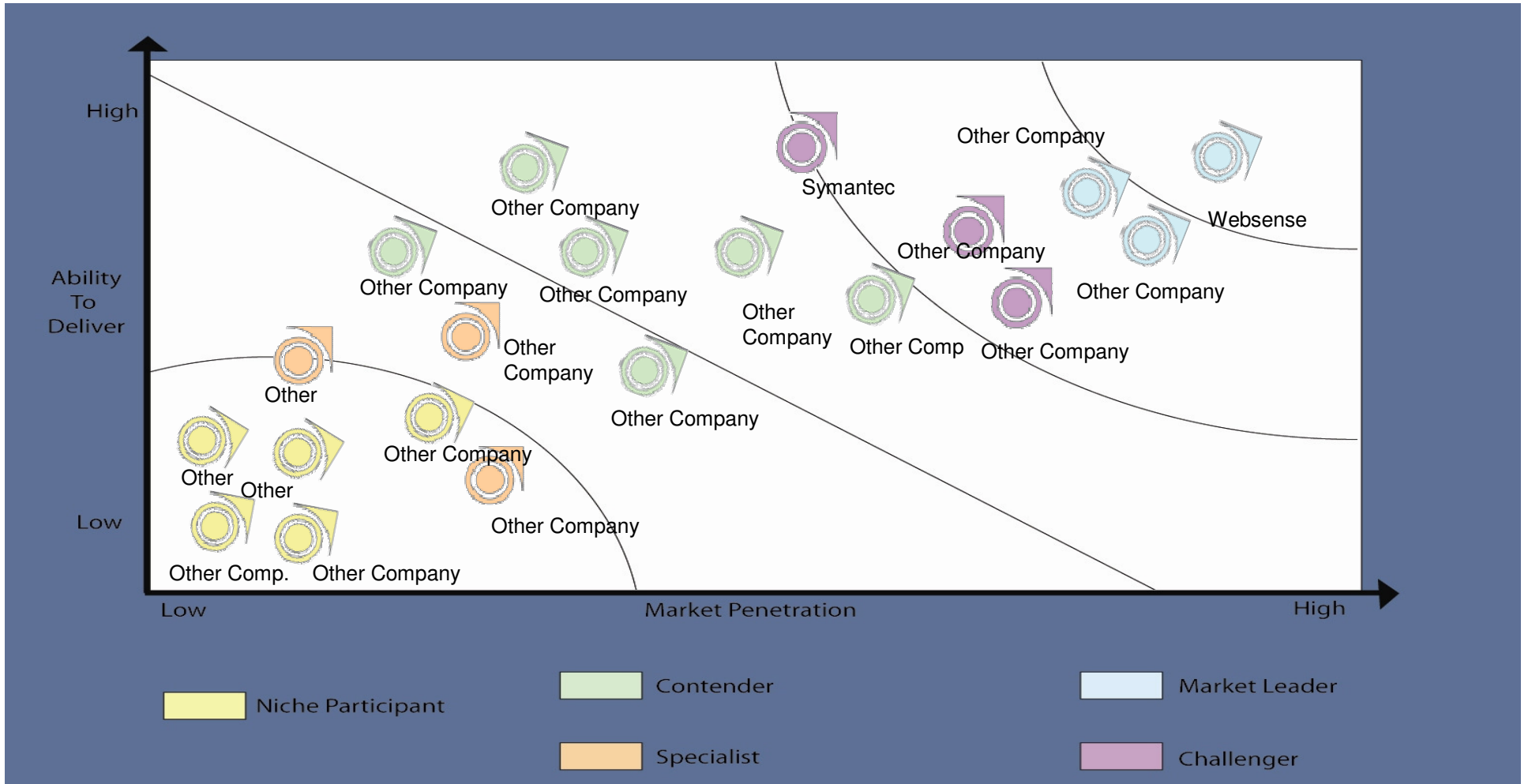


Note: All figures are rounded; the base year is 2008. Source: Frost & Sullivan

Others include: 8e6Technologies (Now Marshal8e6), Aladdin Knowledge Systems, Blue Coat Systems, BorderWare Technologies, ClearSwift, Cloudmark, Computer Associates, Cloudmark, e-Soft, Finjan, Marshal (now Marshal8e6), MessageGate, MiraPoint, PureWire, Sophos, Trustwave, Vericept, Network Box, Microsoft, IBM ISS, SonicWALL, St Bernard Software, GFI Software, Sendmail

Competitive Landscape

Content Filtering Products Market: Competitive Landscape (World), 2008



Source: Frost & Sullivan

Content Filtering Market Leadership

Websense

- Websense, Inc., headquartered in San Diego, California is a provider of Web, data and email security. Protecting more than 50,000 organizations worldwide, the company has maintained a strong competitive position by offering both premise-based and Software-as-a Service (SaaS) security solutions. The company's distribution relies heavily on channel partners. While Websense has a solid foundation in the Web filtering market, the acquisition of SurfControl, PortAuthority, and the release of the Web Security Gateway has provided Websense with a very strong set of integrated solutions across the converging areas of Web Security, Email Security, and Data Loss Prevention.
- This cross-product convergence and integration of Web security, Email security, and DLP provides customers with real business and security value by providing visibility and control around who and what can go where and how. In other words, the ability to intelligently and easily understand and manage which users/groups can use what type of sensitive information and content, as well as which destinations on the Web, over email, or on to USB, and which applications, protocols, or devices they can use to do so.
- Websense continues to have solid growth year after year, and Frost & Sullivan believes that Websense captured over 20 percent of the \$2.7 billion global content filtering market in 2008.

About Frost & Sullivan

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Who is Frost & Sullivan

The Growth Consulting Company

Founded in 1961, Frost & Sullivan has over **45 years** of assisting clients with their decision-making and growth issues.

Over 1,700 Growth Consultants and Industry Analysts across 32 global locations

Over 10,000 clients worldwide - emerging companies, the global 1000 and the investment community

Developers of the **Growth Excellence Matrix** – industry leading growth positioning tool for corporate executives

Developers of **T.E.A.M. Methodology**, proprietary process to ensure that clients receive a 360° perspective of technology, markets and growth opportunities

Three core services: **Growth Partnership Services**, **Growth Consulting** and **Career Best Practices**

Global Perspective

- 1,700 staff across every major market worldwide
- Over 10,000 clients worldwide from emerging to global 1000 companies

