



MIA

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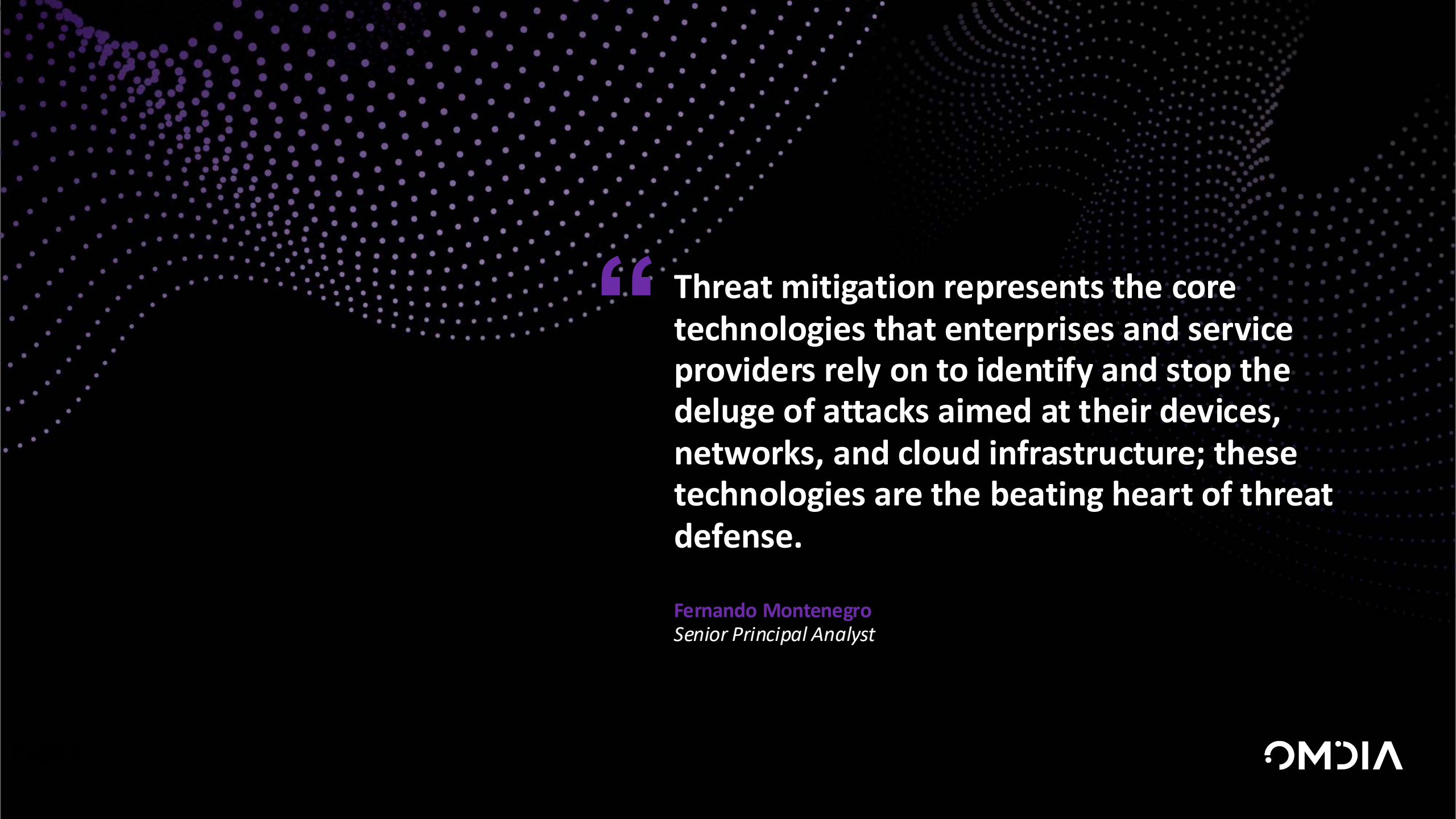
# Infrastructure Security Intelligence Service

## Part of the Cybersecurity Service Area Package

Global, in-depth coverage of the threat mitigation technologies used by enterprises and service providers to protect devices, networks, data centers, and the cloud.

Cybersecurity – Infrastructure Security Intelligence Service

The logo for VICM, consisting of the letters 'VICM' in a bold, black, sans-serif font. The letter 'V' is stylized with a dot at its top left corner. The logo is positioned in the bottom right area of the slide, with decorative dotted patterns in the background.



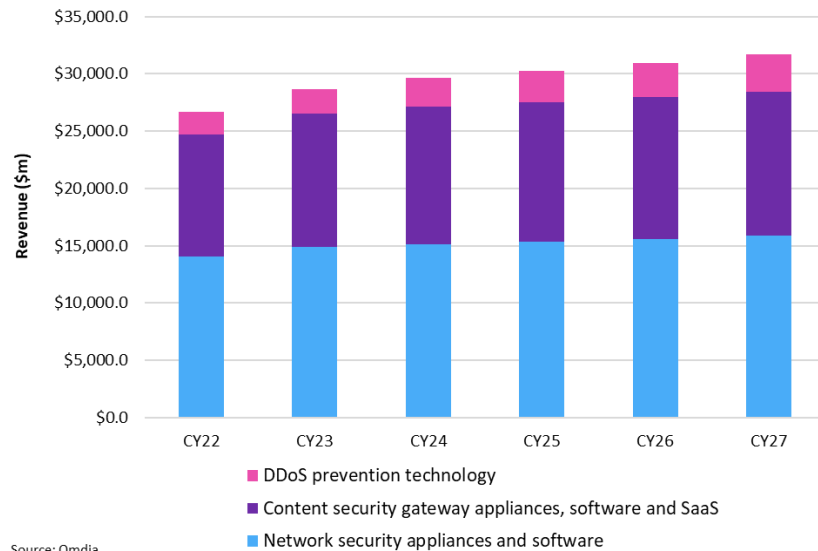
“ Threat mitigation represents the core technologies that enterprises and service providers rely on to identify and stop the deluge of attacks aimed at their devices, networks, and cloud infrastructure; these technologies are the beating heart of threat defense.

**Fernando Montenegro**  
*Senior Principal Analyst*

# Infrastructure Security Intelligence Service

**Part of the Cybersecurity Service Area Package**

Worldwide total security market size and forecast



Source: Omdia

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## HOW OMDIA HELPS YOU

- Identify key technology shifts and opportunities
- Understand how broad IT market drivers change how customers buy and deploy cybersecurity solutions
- Shift to cloud, Evolution of threats, Consolidation of platforms, etc...
- See how major security technology vendors are performing across key technology segments, including firewall, IPS, cloud security, DDoS mitigation, and security SaaS
- Provide the data you need on an ongoing basis to make critical business decisions

## KEY QUESTIONS ADDRESSED

- What are the forecasts for the firewall, IDS/IPS, web security, mail security, CASB, advanced threat prevention, cloud security, endpoint security, DDoS prevention, managed security services, and security SaaS markets for the next five years?
- What are the key trends driving change in cybersecurity technology spending?
- What are the vendor market shares, and how are they changing?

# Infrastructure Security: Our Expert Analysts



**Fernando Montenegro**  
*Senior Principal Analyst*  
Infrastructure Security



**Ketaki Borade**  
*Senior Analyst*  
Security Operations



**Rik Turner**  
*Senior Principal Analyst*  
Emerging Cybersecurity



# Infrastructure Security: Deliverables



## MARKET TRACKERS

-- Quarterly/ Biannual --

Worldwide and regional market size and share information, historic and forecasted through 2028



## SURVEYS

-- Ongoing --

In-depth interviews with technology buyers about their purchasing plans, drivers, challenges, etc.



## DATABASES & REPORTS

-- Quarterly/ Annual --

Combines data from the network security, content security, and DDoS prevention market trackers. Detailed examination of market and technical trends



## ANALYST INSIGHTS

-- Ongoing --

Analyst commentary on market shifts, technology and regional developments, vendors, events, and more



## PRESENTATIONS

-- Quarterly --

Quarterly scheduled briefings with analysts on research highlights from all aspects of the market



## ANALYST ACCESS

-- Ongoing --

For prompt responses to urgent and unique questions

# Infrastructure Security: Market Trackers

## Content Security Gateway Appliances, Software & SaaS

Forecasts, analysis, and trends for e-mail/web/malware security, content security SaaS, ATP solutions (host, network, analysis), and CASB

### DETAILS

**Frequency:** Quarterly

### Measures

- Vendor market shares
- Revenues
- Units
- Licenses
- Virtual instances

### Regions

- Worldwide
- North America (US and Canada)
- Latin America & the Caribbean (including Mexico)
- Europe, Middle East, and Africa (EMEA)
- Asia & Oceania

### COVERAGE

- Appliances
- Software
- Virtual appliances
- SaaS

*Includes messaging, web/malware, web application firewalls, ATP, and CASB*

## Network Security Appliances & Software

Forecasts, analysis, and trends for integrated security appliances (firewall, NGFW, UTM), virtual appliances, secure routers, SSL VPN gateways, and IPS/IDS.

### DETAILS

**Frequency:** Quarterly

### Measures

- Vendor market shares
- Revenues
- Units
- Licenses
- Virtual instances

### Regions

- Worldwide
- North America (US and Canada)
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- Europe, Middle East, and Africa (EMEA)
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### COVERAGE

- Integrated security appliances (includes SME/SOHO, campus, data center/carrier, ported virtual appliances, purpose-built virtual appliances)
- Secure routers
- SSL VPN gateways
- VPN and firewall software
- Network-based IDS/IPS products (includes virtual appliances)

# Infrastructure Security: Market Trackers

## DDoS Prevention Technology Market Tracker

Forecasts, analysis, and trends for DDoS mitigation products and selected services

### DETAILS

**Frequency:** Semi-Annual

### Measures

- Vendor market shares
- Revenues

### Regions

- Worldwide
- North America (US and Canada)
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- Asia & Oceania

### COVERAGE

**DDoS appliances and services for:**

- Enterprise Networks
- Service Providers

## Infrastructure Security Market Database

Combines data from the network security, content security, Cloud Security, Secure Access Service Edge (SASE) and DDoS prevention market trackers

### DETAILS

**Frequency:** Quarterly

### Measures

- Vendor market shares
- Revenues
- Units
- Licenses
- Virtual instances

### Regions

- Worldwide
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### COVERAGE

Data from the following market trackers for a total view of the cybersecurity technology market:

- Content Security Gateway Appliances, Software & SaaS
- Network Security Appliances & Software
- DDoS Prevention Appliances
- Cloud Security (coming 4Q24)
- Secure Access Service Edge (SASE) (coming 4Q24)



# Infrastructure Security: Market Trackers

## Cloud Security Market Tracker- NEW!

Forecasts, analysis, and trends for Cloud Security

### DETAILS

**Frequency:** Semi-Annual

**Measures:**

- Vendor market shares
- Revenues
- Forecast

**Regions**

- Worldwide
- North America (US and Canada)
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- Asia & Oceania

### SELECTED VENDORS

- Aqua Security
- CrowdStrike
- Check Point
- Orca
- Lacework
- Palo Alto Networks
- Wiz
- Others

## Secure Access Service Edge (SASE) Market Tracker –NEW!

Forecasts, analysis, and trends for Secure Access Service Edge (SASE)

### DETAILS

**Frequency:** Semi-Annual

**Measures:**

- Estimated Revenue for vendors
- Market Share for vendors
- Aggregate market Size
- Aggregated market forecast

**Regions**

- North America
- Central and South America
- Western Europe,
- Eastern Europe
- Middle East, Africa
- Central Asia
- East and South Asia

### SELECTED VENDORS

- Broadcom/VMWare
- Cato Networks
- Check Point
- Cloudflare
- Fortinet
- HPE/Aruba
- Netskope
- Palo Alto Networks
- Versa Networks
- Zscaler
- Others

New trackers launching in July 2024!!

# Infrastructure Security: Market Trackers

## DDoS Prevention Technology Market Tracker

Forecasts, analysis, and trends for DDoS mitigation products and selected services

### DETAILS

**Frequency:** Semi-Annual

### Measures

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### COVERAGE

**DDoS appliances and services for:**

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## Infrastructure Security Market Database

Combines data from the network security, content security, and DDoS prevention market trackers

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**Frequency:** Quarterly

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### COVERAGE

Data from the following market trackers for a total view of the cybersecurity technology market:

- Content Security Gateway Appliances, Software & SaaS
- Network Security Appliances & Software
- DDoS Prevention Appliances

# Infrastructure Security: Vendor Benchmarking & Reports

## Comparative Research – Omdia Universe & Market Radars

The purpose of Omdia Universe research is to help technology decision-makers make informed, balanced and smart decisions so that they can best utilize and benefit from the myriad of valuable technology solutions that exist

**Market Radar: Secure Access Service Edge (SASE) Q2 2023**  
**Omdia Universe – Email security Q4 2023**

### Omdia Universe description

- **What:** Omdia has developed a new and improved approach to support the selection of vendor products and services with the Technology Users and Buyers at its heart.
- **How:** Reports will be based on robust research reflecting each vendors' current capabilities, readiness for the future and most importantly, mirror the actual experiences and requirements of the tech user community
- **Where:** Global in nature

### Measures

- Product capability
- Customer experience
- Market presence

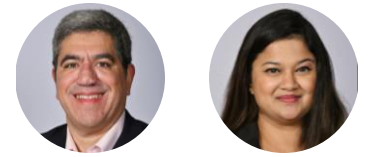
**Market Radar** reports cover emerging and transformative technologies with a focus on solution capabilities. Omdia Market Radar enables you to compare and evaluate vendors by solution, performance, maturity, breadth of proposition and more. Make better choices with our expert insights.

## Annual Reports

### Report Titles: (subject to change)

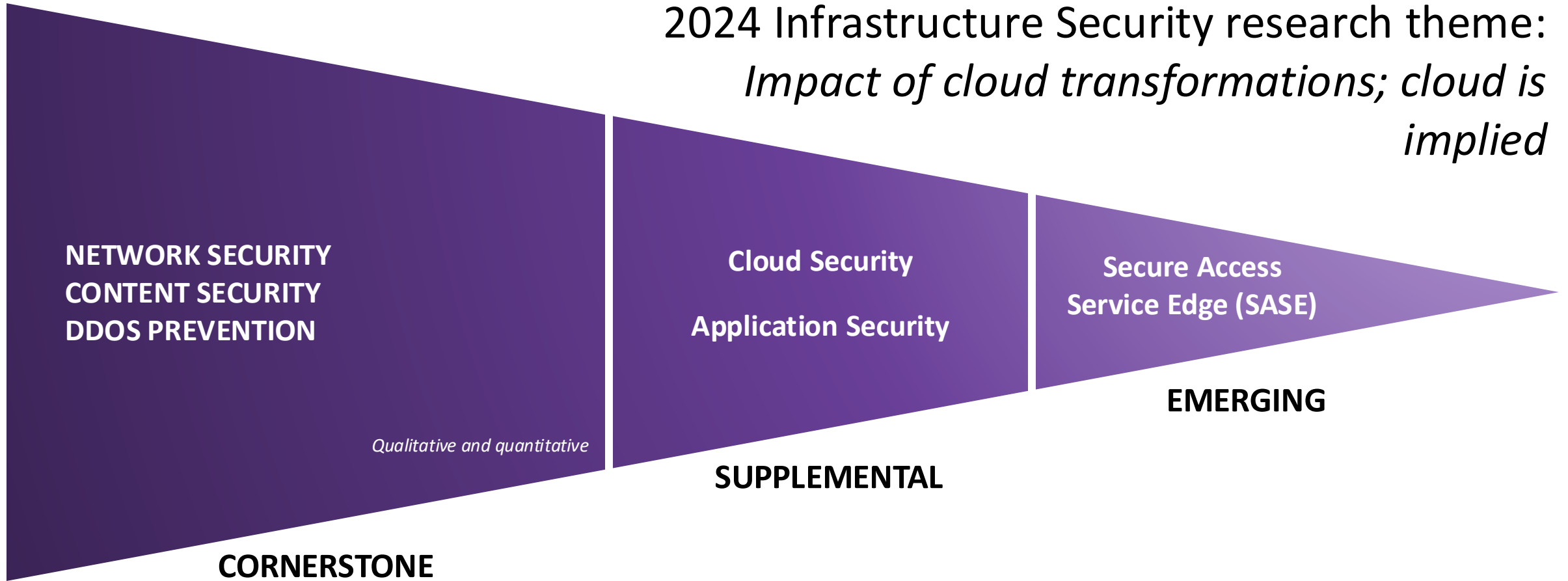
- 2024 Trends to Watch: Infrastructure Security (Q4 2023)
- Market Landscape for CNAPP (Q1 2024)
- Market Landscape for Application Security (Q1 2024)
- IT Enterprise Insights Survey 2024: Infrastructure Security (Q1 2024)
- Market Landscape for Kubernetes Security (Q2 2024)
- Market Landscape for Cloud Firewalls (Q2 2024)
- Cybersecurity Decision-Maker Survey 2024: Infrastructure Security (Q3 2024)
- 2025 Trends to Watch: Infrastructure Security (Q3 2024)
- Market Landscape for Software Supply Chain Security (Q4 2024)
- Market Landscape for Application-centric DDoS prevention (Q4 2024)

# Infrastructure Security research coverage, 2024



2024 Infrastructure Security research theme:  
*Impact of cloud transformations; cloud is implied*

Infra. Security Research Strategy



# 2024 Research Agenda

Quarter	Topic
Q1 2024	<b>Market Landscape for API Security:</b> As modern society built its reliance on IT, one of the fundamental concepts is the notion of an application programming interface (API) as how entities request services and share information. Yet using and implementing APIs comes with significant security challenges that must be overcome. This report will look at the concepts, principles, strategies, products, and services involved as the enterprise works to get it right.
Q2 2024	<b>ML for Kubernetes Security Posture Management:</b> Kubernetes environments are the de-facto standard for cloud-native technologies but securing them involves numerous topics including container workload security, securing the Kubernetes management plane, and deep integration with software development pipelines. This report will look at the concepts, principles, strategies, products, and services involved as the enterprise works to get it right. <b>ML for Cloud Firewalling:</b> As organizations continue adoption of cloud environments, network security remains of paramount importance. In this scenario, implementing proper network security controls - regardless of where the workload resides - is increasingly done by cloud-based firewalling functionality.
Q3 2024	<b>2025 Trends to Watch:</b> Each year, Omdia analysts present the trends that will define the coming year. 2024 is no exception, as we learn from the present year to define for clients the topics and technologies that will dominate conversations and news in 2025.
Q4 2024	<b>ML for Software Supply Chain Security:</b> As an investor famously said, in 2011 "Software is eating the world". By now, most organizations depend heavily on a complex ecosystem of software components used for both business and operations needs. Securing this ecosystem requires a variety of components and techniques, interwoven with software development principles. This report will look at the concepts, principles, strategies, products, and services involved as the enterprise works to get it right. <b>ML for App-centric DDoS Prevention</b> The shift in architecture brought upon by cloud deployments now means that for many organizations, they can fine-tune many security controls - including DDoS prevention - on a per-application basis. This means an increased focus on application-specific options from a variety of providers.



## Cybersecurity Service Area

Cybersecurity Viewpoint Service

Data Security  
Intelligence Service

Identity, Authentication, Access  
Intelligence Service

Infrastructure Security  
Intelligence Service

Security Operations (SecOps)  
Intelligence Service

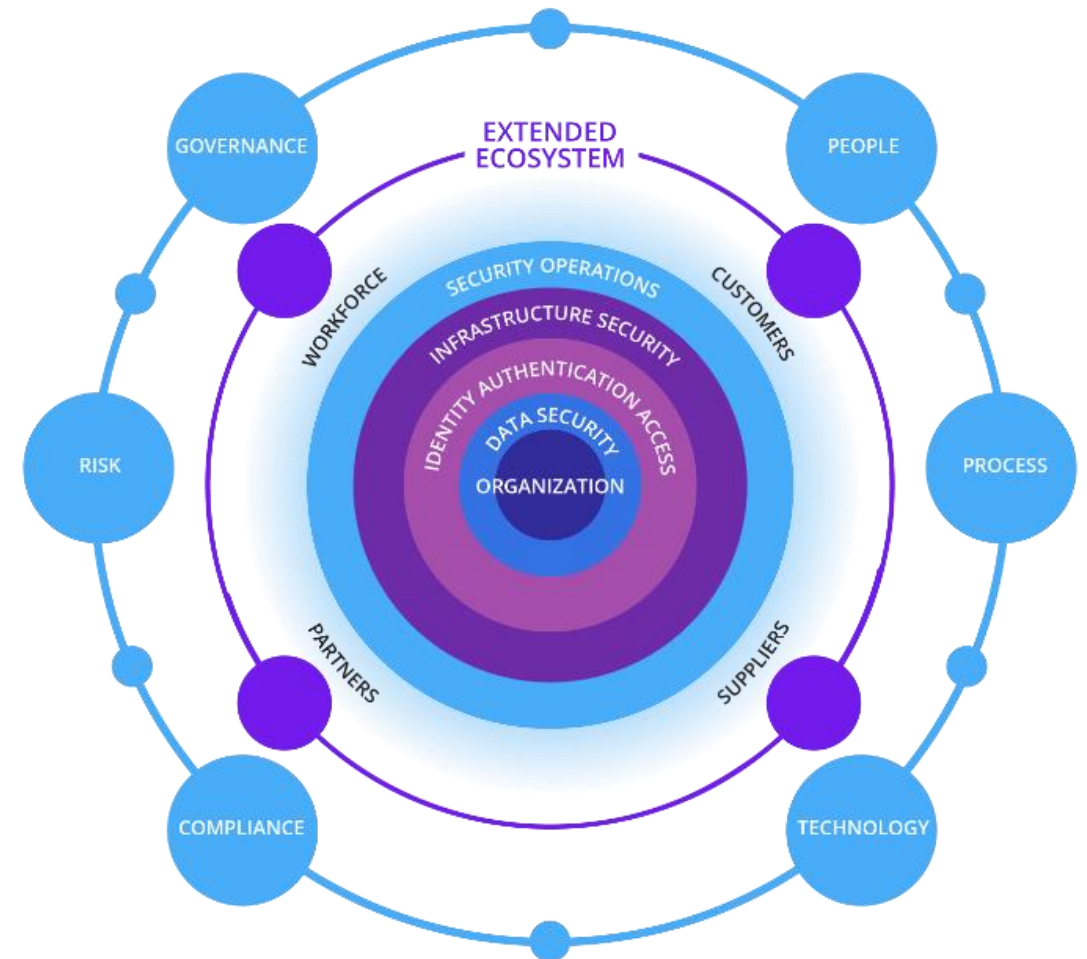
IoT Cybersecurity  
Intelligence Service

Managed Security Services  
Intelligence Service

DDoS Prevention  
Intelligence Service

Emerging Cybersecurity  
Intelligence Service

## Omdia Cybersecurity Ecosystem





# Our “Ask an Analyst” Service Provides Best in Class Customer Support

Leverage unique access to market leading analysts and profit from their deep industry expertise during tailored Ask and Analyst sessions included in your subscription.

## Get guidance on:

- How to best navigate the service
- Methodologies
- Data trends

Our Ask and Analyst service can be accessed via phone, email or a face-to-face session with our expert analyst team




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# Get in touch!

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