The Radicati Group, Inc.
www.radicati.com

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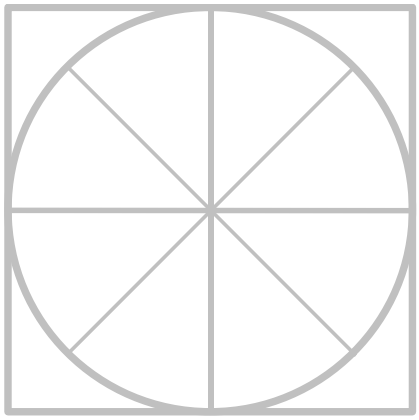
# Data Loss Prevention – Market Quadrant 2019

*An Analysis of the Market for Data Loss Prevention Revealing Top Players, Trail Blazers, Specialists and Mature Players.*

***November 2019***



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## RADICATI MARKET QUADRANTS EXPLAINED

Radicati Market Quadrants are designed to illustrate how individual vendors fit within specific technology markets at any given point in time. All Radicati Market Quadrants are composed of four sections, as shown in the example quadrant (Figure 1).

- ***Top Players*** – These are the current market leaders with products that offer, both breadth and depth of functionality, as well as possess a solid vision for the future. Top Players shape the market with their technology and strategic vision. Vendors don't become Top Players overnight. Most of the companies in this quadrant were first Specialists or Trail Blazers (some were both). As companies reach this stage, they must fight complacency and continue to innovate.

- ***Trail Blazers*** – These vendors offer advanced, best of breed technology, in some areas of their solutions, but don't necessarily have all the features and functionality that would position them as Top Players. Trail Blazers, however, have the potential for "disrupting" the market with new technology or new delivery models. In time, these vendors are most likely to grow into Top Players.

- ***Specialists*** – This group is made up of two types of companies:

    - Emerging players that are new to the industry and still have to develop some aspects of their solutions. These companies are still developing their strategy and technology.
    - Established vendors that offer very good solutions for their customer base, and have a loyal customer base that is totally satisfied with the functionality they are deploying.

- ***Mature Players*** – These vendors are large, established vendors that may offer strong features and functionality, but have slowed down innovation and are no longer considered "movers and shakers" in this market as they once were.

    - In some cases, this is by design. If a vendor has made a strategic decision to move in a new direction, they may choose to slow development on existing products.

 

- In other cases, a vendor may simply have become complacent and be out-developed by hungrier, more innovative Trail Blazers or Top Players.
- Companies in this stage will either find new life, reviving their R&D efforts and move back into the Top Players segment, or else they slowly fade away as legacy technology.

Figure 1, below, shows a sample Radicati Market Quadrant. As a vendor continues to develop its product solutions adding features and functionality, it will move vertically along the "y" functionality axis.

The horizontal "x" strategic vision axis reflects a vendor's understanding of the market and their strategic direction plans. It is common for vendors to move in the quadrant, as their products evolve and market needs change.

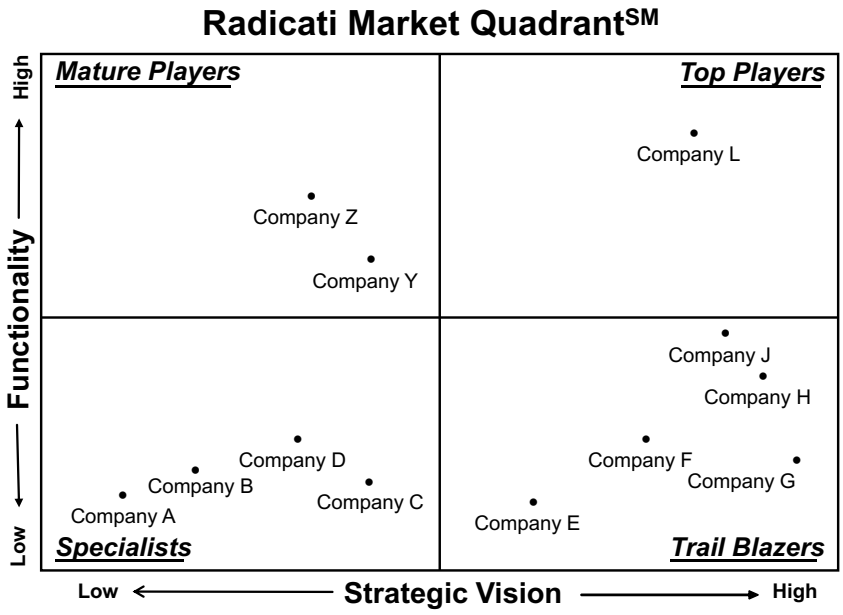


**Figure 1: Sample Radicati Market Quadrant**

## INCLUSION CRITERIA

We include vendors based on the number of customer inquiries we receive throughout the year. We normally try to cap the number of vendors we include to about 10-12 vendors. Sometimes, however, in highly crowded markets we need to include a larger number of vendors.

 

## MARKET SEGMENTATION – DATA LOSS PREVENTION

This edition of Radicati Market Quadrants[SM] covers the "**Data Loss Prevention**" (DLP) market, which is defined as follows:

- **Data Loss Prevention** solutions – are appliances, software, cloud services, and hybrid solutions that provide electronic data supervision and management to help organizations prevent non-compliant information sharing. These solutions serve to protect data at rest, data in use, and data in motion. Furthermore, these solutions are "content-aware" which means they can understand the content that is being protected to a much higher degree than simple keywords. Leading vendors in this segment include: *Clearswift, CoSoSys, Digital Guardian, Falcongaze, Fidelis Cybersecurity, Forcepoint, McAfee, SearchInform, Symantec,* and *Zecurion*.

- We distinguish between three types of DLP solutions:

  - *Full DLP solutions* – protect data in use, data at rest, and data in motion and are "aware" of content that is being protected. A full-featured content-aware DLP solution looks beyond keyword matching and incorporates metadata, role of the employee in the organization, ownership of the data, and other information to determine the sensitivity of the content. Organizations can define policies to block, quarantine, warn, encrypt, and perform other actions that maintain the integrity and security of data.

  - *Channel DLP solutions* – typically enforce policies on one specific type of data, usually data in motion, over a particular channel (e.g. email). Some Channel DLP solutions are content-aware, but most typically rely only on keyword blocking.

  - *DLP-Lite solutions* – are add-ons to other enterprise solutions (e.g. information archiving) and may or may not be content-aware. DLP-Lite solutions will typically only monitor data at rest, or data in use.

- This Market Quadrant deals only with Full DLP solutions, as defined above. Channel DLP and DLP-Lite solutions are not included in this report as they are usually purchased as a component of a broader security or data retention solution (e.g. Compliance and Data

 

Governance).

- External threats to data exists in a myriad of forms through advanced persistent threats (APT), espionage, and other attempts to gain unauthorized access to data. While external threats are a problem, data loss from internal threats is also a significant concern. Internal data loss can be malicious, such as a disgruntled worker copying sensitive data to a flash drive, or it can be the result of negligence due to an honest mistake, such as an employee sending a customer list to a business partner that shouldn't have access to it.

- Increased worldwide regulations also support growing adoption of DLP solutions. Laws that mandate the disclosure of data breaches of customer data, compliance with government and industry regulations, as well as recent regulations such as the European General Data Protection Regulation (GDPR) and the EU-US Privacy Shield affect organizations of all sizes, across all verticals.

- Organizations of all sizes continue to invest heavily in DLP solutions to protect data and ensure compliance. The worldwide revenue for DLP solutions is expected to grow from over $1.2 billion in 2019, to nearly $2.3 billion by 2023.

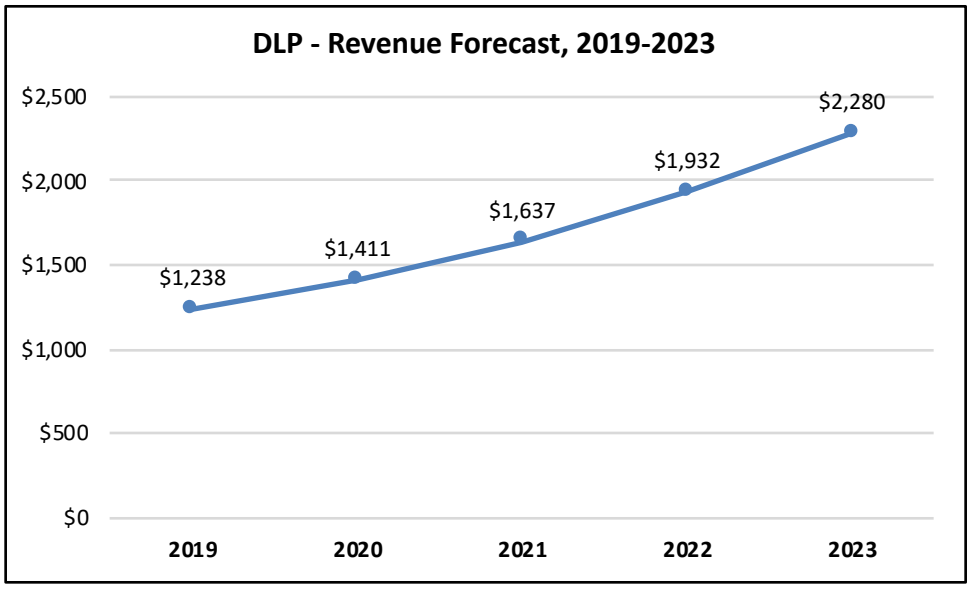


**Figure 2: DLP Revenue Forecast, 2019 – 2023**

 

## EVALUATION CRITERIA

Vendors are positioned in the quadrant according to two criteria: *Functionality* and *Strategic Vision*.

***Functionality*** is assessed based on the breadth and depth of features of each vendor's solution. All features and functionality do not necessarily have to be the vendor's own original technology, but they should be integrated and available for deployment when the solution is purchased.

***Strategic Vision*** refers to the vendor's strategic direction, which comprises: a thorough understanding of customer needs, ability to deliver through attractive pricing and channel models, solid customer support, and strong on-going innovation.

Vendors in the *Data Loss Prevention* space are evaluated according to the following key features and capabilities:

- ***Deployment Options*** – availability of the solution in different form factors, such as on-premises, appliance and/or virtual appliance, cloud-based services, or hybrid.

- ***Platform Support*** – the range of computing platforms supported, e.g. Windows, macOS, Linux, iOS, Android, and others.

- ***Data in use*** – the ability to assign management rights (manually or automatically) to files and data that specify what can and cannot be done with them (e.g. read-only, print controls, copy/paste controls, etc.). In addition, the ability to specify which devices and protocols (e.g. Bluetooth) can be used when accessing sensitive data. For devices, DLP solutions should be able to specify the type and brand of authorized devices that can interact with sensitive data.

- ***Data in motion*** – web controls and content inspection that prevent the sending of sensitive data through the web, email, social networks, blogs, and other communication channels. Integration with secure web gateways and email gateways is an important aspect of this function.

 

- ***Data at rest*** – refers to data store scanning, fingerprint scanning and the ability to monitor all stored data at regular intervals in accordance with established corporate data policies.

- ***Policy templates*** – built-in and easily customizable policy templates to help adhere to industry regulations (e.g. HIPAA, PCI, and others) and best practices.

- ***Directory Integration*** – integration with Active Directory, LDAP, etc. to help manage and enforce user policies.

- ***Enforcement visibility*** – employee alerts and self-remediation capabilities, such as confirmations and justifications of data policy breaches.

- ***Mobile DLP*** – monitoring of data on mobile devices fully integrated with organization-wide DLP controls. Integration with Mobile Device Management (MDM) / Enterprise Mobility Management (EMM) capabilities, or partnerships with leading MDM/EMM vendors.

- ***Centralized Management*** – easy, single pane of glass management across all deployment form factors, i.e. cloud, on-premises, hybrid, etc.

- ***Encryption*** – vendor-provided embedded encryption capabilities or through add-ons.

- ***Drip DLP*** – features to control the slow leaking of information by monitoring multiple transfer instances of sensitive data.

- ***Cloud Access Security Broker (CASB) integration*** – either through the vendor's own CASB capabilities or through partners.

In addition, for all vendors we consider the following aspects:

- *Pricing* – what is the pricing model for their solution, is it easy to understand and allows customers to budget properly for the solution, as well as is it in line with the level of functionality being offered, and does it represent a "good value".

- *Customer Support* – is customer support adequate and in line with customer needs and response requirements.

 

- *Professional Services* – does the vendor provide the right level of professional services for planning, design and deployment, either through their own internal teams, or through partners.

***Note**: On occasion, we may place a vendor in the Top Player or Trail Blazer category even if they are missing one or more features listed above, if we feel that some other aspect(s) of their solution is particularly unique and innovative.*

 

## MARKET QUADRANT – DATA LOSS PREVENTION

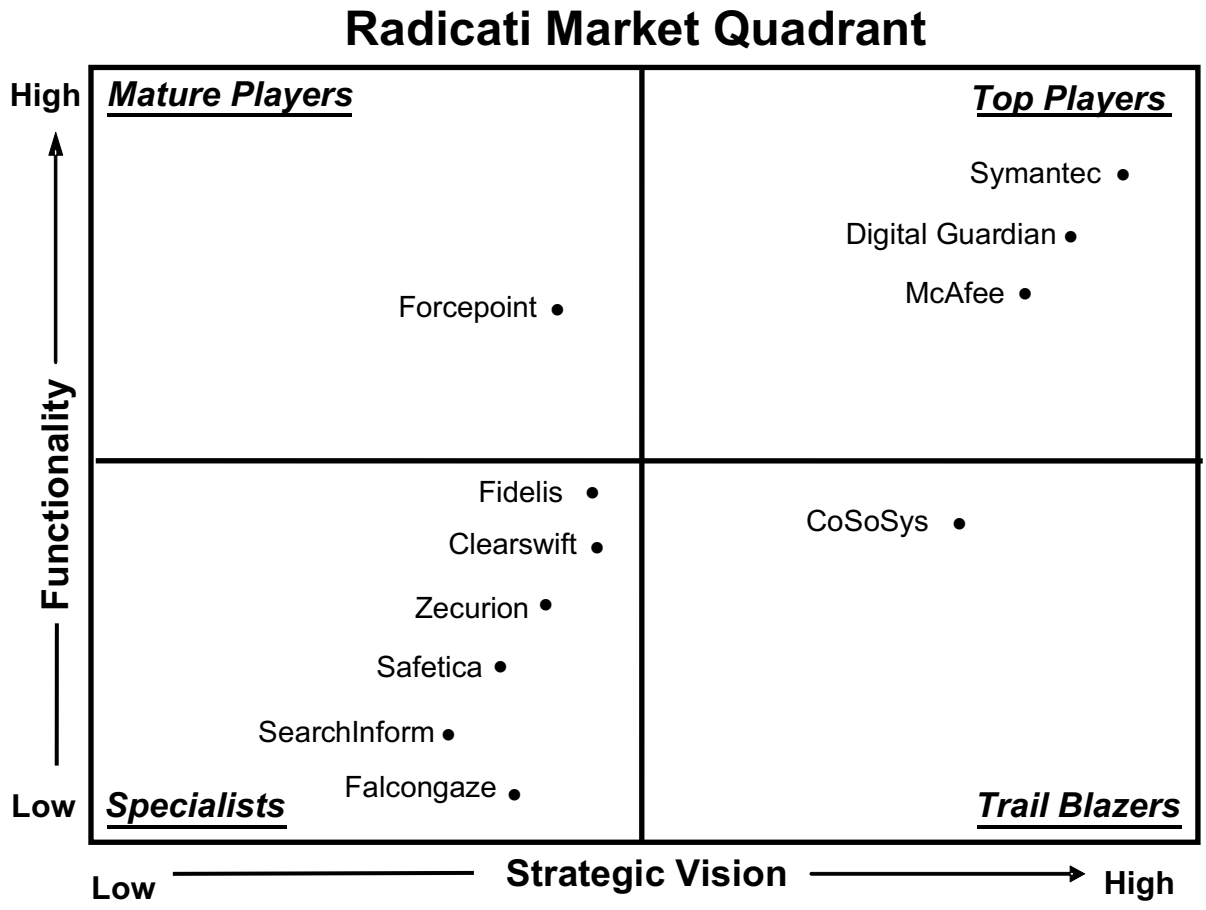


**Figure 3: Data Loss Prevention Market Quadrant, 2019***

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## KEY MARKET QUADRANT TRENDS

- The **Top Players** in the Data Loss Prevention market today are *Symantec, Digital Guardian,* and *McAfee*.

- The **Trail Blazers** quadrant includes *CoSoSys*.

- The **Specialists** quadrant includes *Fidelis Cybersecurity, Clearswift, Zecurion*, *Safetica*, *SearchInform*, and *Falcongaze*.

- The **Mature Players** quadrant includes *Forcepoint*.

## DATA LOSS PREVENTION - VENDOR ANALYSIS

## TOP PLAYERS

### SYMANTEC

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Mountain View, CA 94043
www.symantec.com

Founded in 1982, Symantec has grown to be one of the largest providers of enterprise security technology. Symantec's security solutions are powered by its *Global Intelligence Network,* which offers real-time threat intelligence. In August 2019, Broadcom announced the acquisition of Symantec's enterprise security business.

#### SOLUTIONS

**Symantec DLP** covers cloud, endpoint, network, and storage, and is available in the following components, as well as a combined Symantec DLP Enterprise Suite:

 

- **Symantec DLP Cloud Services** – provides DLP controls for a wide range of sanctioned and unsanctioned cloud applications, such as Office 365, Box and Amazon S3. It detects and blocks policy violations in real-time through a combination of API scanning and inline cloud traffic inspection. It can be tightly integrated with Symantec's CloudSOC CASB, Email Security, and Web Security solutions.

- **Symantec DLP for Network** – scans and inspects network traffic at common network egress points for leaks of information. It covers a wide range of communication protocols including SMTP, FTP, HTTP/S, IM, NNTP and TCP. It provides the ability to block, modify or redirect email messages and web content. It can connect to network taps or SPANs, MTAs, and web proxies (via ICAP).

- **Symantec DLP for Endpoint** – is a single, lightweight endpoint agent which discovers and monitors sensitive data on Windows and Mac OS. It can discover data at rest as well as monitor email clients, cloud apps, network protocols, removable storage, virtual desktops and various copy/print/share functions. It can also warn users of a violation via a pop-up or email notification, it can quarantine files locally or remotely, tag files, and apply policy-based encryption or DRM. It integrates with Symantec Endpoint Protection.

- **Symantec DLP for Storage** – discovers sensitive data at rest across file and storage servers, network shares, databases, document and records management, and other types of data repositories. It provides local and remote file quarantining, data classification/tagging, policy-based encryption, and DRM.

- **Symantec DLP Data Access Governance** – monitors file usage activity and user access permissions on Windows and Unix/Linux file systems, SharePoint sites, and NAS filers. It audits and manages permission levels to enforce a least privilege model.

- **Symantec Information Centric Tagging** – provides user-driven and machine-aided data classification/tagging capabilities for emails and documents.

- **Symantec Information Centric Encryption** – provides encryption and DRM capabilities for data in motion, data at rest, and data in use. Files are persistently protected when moved to cloud applications, unmanaged mobile devices, or personal laptops. Administrators can remotely track and revoke user access throughout the information lifecycle.

 

- **Symantec Information Centric Analytics** – is a user and entity behavior analytics (UEBA) tool that aggregates and contextualizes DLP incidents with telemetry/alerts from other security tools. It helps detect anomalous user behavior, escalates high-risk events, and bulk handles low-risk events.

**STRENGTHS**

- Symantec offers a sophisticated and comprehensive DLP solution which can help meet the complex needs of enterprises of all sizes.

- Symantec DLP offers a strong set of content detection technologies through advanced capabilities such as machine learning, fingerprinting, image recognition, and tagging.

- Symantec's DLP solution includes a number of key capabilities, such as data classification, encryption and digital rights management, and user entity behavior analytics (UEBA).

- Symantec DLP is fully integrated with key components of Symantec's product portfolio, in particular CloudSOC (CASB), Email Security, Endpoint Security, and Web Security. Customers can benefit from a consistent policy architecture and enforcement across multiple channels of potential data loss.

- Symantec DLP solutions are available in all form factors including on-premises and cloud-managed. This is important for customers who may not be able to move to cloud due to regulatory requirements, and prefer on-premises solutions, or hybrid solutions.

**WEAKNESSES**

- Symantec can be somewhat more expensive than other DLP solutions on the market. However, it delivers a rich feature set which when fully integrated with other Symantec security solutions delivers significant protection benefits.

- While Symantec offers a broad portfolio of data security solutions, it can be somewhat complex to manage for organizations with fewer resources. Smaller companies can rely on managed services offered through Symantec partners.

 

- While Symantec continues to innovate in this space and has strong brand recognition, it is perceived to be more focused on the needs of enterprise customers than those of small to mid-market customers.

## DIGITAL GUARDIAN

275 Wyman Street, Suite 250
Waltham, MA 02451
www.digitalguardian.com

Digital Guardian provides data loss prevention software aimed at stopping internal and external threats across endpoint devices, corporate networks, servers, databases and cloud-based environments. The company is privately held and headquartered in Waltham, Massachusetts with offices worldwide.

### SOLUTIONS

Digital Guardian provides data protection platform purpose built to stop unintentional data loss from insiders and malicious data theft from outside attacks. The platform performs across the corporate network, traditional endpoints, and cloud applications, leveraging a big data security analytics cloud service, to enable it to see and block all threats to sensitive information. The Digital Guardian platform comprises the following components:

- **Digital Guardian Data Protection Platform** – is designed to discover and protect sensitive data throughout the data lifecycle and across the enterprise. It helps protect sensitive data on the network layer, at the endpoint layer, in the cloud and on mobile devices through automated context-based and content/fingerprint-based classification, plus user-based data classification. The platform is available through flexible deployment options which include on-premises, SaaS, or as a managed security service backed by an analyst team with threat detection expertise.

- **Digital Guardian for Endpoint Data Loss Prevention** – stops sensitive data from getting out of an organization. It provides automated as well as user-based classification of sensitive data on endpoints, inspects and controls all content with context-aware DLP, and enforces

 

DLP policies across all egress channels. It is available for Windows, Linux and macOS workstations.

- **Digital Guardian for Network Data Loss Prevention** – is a virtual or physical appliance that discovers and classifies sensitive and regulated data, prevents sensitive data from leaving via the network, monitors and controls all communications channels including email (SMTP), Web (HTTP/HTTPS), FTP and SSL.

- **Digital Guardian for Cloud Data Loss Prevention** – integrates with leading cloud storage and collaboration providers such as Box, Citrix and Microsoft. It discovers sensitive data in cloud storage, continuously audits files that have been uploaded, automatically remediates according to enterprise policies, and instantly alerts administrators and/or data owners when protected data has been identified.

- **Digital Guardian Analytics & Reporting Cloud (ARC)** – is an advanced analytics and reporting solution that delivers threat-aware data protection as a cloud-based, subscription service. It leverages streaming data from Digital Guardian endpoint agents and network appliances, to provide the deep visibility into system, data and user events. This visibility powers security analyst-approved dashboards to enable data loss prevention and endpoint detection and response through the same console. This is a key feature as it prevents data exfiltration from both internal and external attackers.

Digital Guardian also supports User & Entity Behavior Analytics (UEBA) functionality to provide visibility into all user, computer, printer and file events to determine risky or anomalous behavior. The UEBA functionality integrates with advanced analytics in Digital Guardian Cloud to enable faster, more accurate identification of insider threats and help reduce incident response times. This capability is available to all subscribers of Digital Guardian Cloud, and does not require integration with third party components.

**STRENGTHS**

- Digital Guardian's data protection platform protects sensitive data against both internal and external threats using the same agent, network appliance and management console. It also allows enterprises to mark data as confidential based on the context in which it was created,

 

and then relies on this contextual information to 'follow' data so that appropriate controls can be applied to avoid the egress of sensitive information.

- Digital Guardian's kernel level endpoint agent is available for Windows, macOS, and Linux.

- Digital Guardian offers a mobile app for a secure document viewing, through the iTunes store, which allows users to view encrypted MS Office, Apple iWork, text, or PDF docs on iOS devices.

- Digital Guardian Endpoint DLP is event-driven, where agents begin collecting information about data movement upon deployment, rather than requiring defined policies which may be more difficult to construct.

- Digital Guardian supports a broad range of integrations, such as SIEM, CASB, encryption, threat intelligence feeds, network sandboxes, and as well as connecting with web and email security gateways via ICAP.

- Digital Guardian's UEBA capabilities further enhance its ability to detect risky or suspicious user behavior.

**WEAKNESSES**

- Digital Guardian has limited mobile DLP capabilities, so customers would need to rely on existing mobile device management (MDM) or mobile application management (MAM) solutions.

- Digital Guardian can support cloud file storage and collaboration but only for supported vendors such as Box, Accellion, Citrix Share File, Office 365, One Drive, and others. Support for cloud applications like Salesforce.com, is currently available only through a CASB provider. Digital Guardian partners and integrates with popular CASB solutions, including Netskope and Bitglass.

- While Digital Guardian integrates with Microsoft Office 365 to deliver Microsoft's Azure Information Protection digital rights management capability, they do not offer native DRM.

 

The vendor offers this through partners.

- Digital Guardian's network DLP appliance (from the Code Green Networks acquisition) does not yet fully integrate with its endpoint DLP solution, requiring customers of endpoint and network DLP to write separate policies. The vendor is working to address this.

## MCAFEE

2821 Mission College Blvd.
Santa Clara, CA 95054
www.mcafee.com

McAfee is a device-to-cloud cybersecurity company that delivers security solutions and services for business organizations and consumers. The company provides solutions that protect endpoints, networks, servers, cloud and more. The company is privately held.

### SOLUTIONS

**McAfee Data Loss Prevention** offers a number of DLP components for endpoint, network, and cloud that can be mixed and matched to create a complete DLP solution. McAfee DLP is a key component in McAfee's MVISION Unified Cloud Edge (UCE) vision, a device to cloud strategy that converges CASB, DLP and Web technologies to help organizations apply consistent data security and threat protection policies across their entire environment. McAfee Data Loss Prevention provides the following functionality:

- **MVISION Cloud** – Cloud DLP enforces policies based on customer content rules to prevent data loss in cloud applications and infrastructure, across file, structured, and unstructured data. On-premises DLP content rules and policies can be synced with MVISION Cloud and also applied to cloud services.

- **McAfee Device Control** – manages and controls the copying of data to removable media and storage devices, such as USB drives, CDs, DVDs, Bluetooth, imaging equipment, and more.

 

Transfers can be blocked based on content, context, or device type. It is available for both Macs and PCs.

- **McAfee DLP Discover** – identifies and protects data at rest for both network storage and endpoint storage. The solution indexes content at rest within the network, including databases, Microsoft SharePoint and endpoints and allows administrators to see how this data is used, who owns it, where it is stored, and other details. McAfee DLP Discover also offers Exact Data Matching for structured data, such as sensitive data stored in an excel sheet in the database. In addition, Optical Character Recognition (OCR) functionality is included to recognize and protect text in scanned images and forms.

- **McAfee DLP Monitor** – identifies, tracks, and reports on data-in-motion in an organization. The solution monitors all outbound network data. The information stored in the Capture database gives administrators insight into a company's historical data to help set accurate DLP policies and reduce false positives. DLP monitor is available as a physical or a virtual appliance, and can detect and manage over 300 content types. It includes Optical Character Recognition (OCR) functionality.

- **McAfee DLP Prevent** – encrypts, redirects, quarantines, or blocks sensitive data being transferred via email, IM (instant messaging), HTTP/HTTPS, FTP transfers, and other methods. DLP Prevent scans inbound and outbound network traffic across all ports, multiple protocols, and various content types. McAfee DLP Prevent for Mobile Email provides content-aware protection to mobile email by intercepting emails downloaded to the mobile device, via ActiveSync proxy with DLP capability, requiring no agent to be installed. The Capture technology is also available, and can act as a digital recorder to replay DLP incidents after the fact for more thorough investigation. DLP Prevent also offers Exact Data Matching for structured data, such as sensitive data stored in an excel sheet in the database. It includes Optical Character Recognition (OCR).

- **McAfee DLP Endpoint** – controls data transfers that happen on endpoints via applications, removable storage devices, the cloud and more. It can block, alert, notify, encrypt, quarantine, and perform other actions on sensitive data on an endpoint. DLP Endpoint provides Web Post support for Google Chrome browser. It also includes out-of-box GDPR policies.

 

**McAfee ePO (ePolicy Orchestrator)** is currently McAfee's administrative console which can be used to set policies, manage incidents and workflows for all network and endpoint DLP components. McAfee also recently added **MVISION ePO**, a cloud-native platform to serve as its new centralized administrative console, and is in the process of migrating customers across its solutions portfolio to the new platform.

**STRENGTHS**

- McAfee DLP is integrated with McAfee MVISION Cloud (its CASB offering), which helps organizations easily extend DLP policies into the cloud. Common data protection policies can be created across multiple environments, with the same data classification tags shared to ensure consistent data loss detection from device to cloud.

- McAfee ePolicy Orchestrator provides single pane of glass incident workflow management, as well as allows for common policy management across endpoint, network and cloud DLP.

- The Capture database included in the McAfee DLP solution logs all data in motion and delivers valuable analytics to administrators about how data is being used and sent. It is also useful for forensic purposes.

- The McAfee DLP solution offers both automated and manual classification by end-users. The Manual Classification, which is included free in the DLP Endpoint license helps increase end-user data protection awareness and alleviate administrative burden.

- McAfee's bundled DLP suite, McAfee Total Protection for DLP, includes all DLP components at a discount. Also, features, such as Manual Classification, and DLP Prevent for mobile email have been added the existing licensing for free. McAfee Device Control is also included in McAfee DLP Endpoint license.

**WEAKNESSES**

- McAfee DLP does not currently provide agent support for Linux.

- McAfee DLP does not currently offer specific features for Drip DLP detection. While such detection can be set up through rules, customers we spoke with indicated that it is somewhat

 

cumbersome.

- While offering a rich set of functionality, McAfee DLP requires an experienced IT team to properly install and maintain the solution in a way that fully leverages its capabilities.

- While feature rich, a fully featured deployment of McAfee DLP tends to be somewhat more expensive than competing solutions.

## TRAIL BLAZERS

### COSOSYS

Str. Somesului 14, Ground Floor
400145 Cluj-Napoca
Romania
www.cososys.com

CoSoSys offers solutions for Data Loss Prevention (DLP), including Device Control, eDiscovery, Content Aware Protection, Enforced Encryption and Mobile Device Management (MDM). The company is privately held.

#### SOLUTIONS

CoSoSys' **Endpoint Protector** is a comprehensive and cross-platform Data Loss Prevention (DLP) solution for Windows, macOS and Linux, as well as Mobile Device Management for iOS and Android. The solution focuses on avoiding unintentional data leaks, protects from malicious data theft and offers seamless control of portable storage devices. It covers all major exit points such as email, cloud file sharing applications, portable storage devices and more. It offers content monitoring and filtering capabilities, for both data at rest and in motion, ranging from file type to predefined content based on dictionaries, regular expressions and machine learning. It supports key data protection regulations such as GDPR, CCPA, HIPAA, PCI DSS, and others. Administrators can define detection patterns based on proximity, dictionaries, regular expressions, and more. The movement of valuable data to unauthorized external individuals is

 

monitored through the exit points and administrators are alerted in the case of a policy violation. All reports are viewed through a centralized management console.

The solution is offered in various form factors as follows:

- **Endpoint Protector** – on-premises DLP, available as hardware or virtual appliance, as well as an instance on AWS, Azure and Google Cloud. The virtual appliance supports all popular hypervisors, e.g. VMware, HyperV, Citrix XenServer, and others. Endpoint Protector is also available as a CoSoSys hosted solution.

- **My Endpoint Protector** – is a cloud based DLP solution for smaller enterprises.

- **Endpoint Protector Basic** – is a standalone Device Control solution, aimed at the needs of small businesses or isolated endpoints (e.g. a production line, with no network or Internet connection).

Endpoint Protector features five specialized modules that can be mixed and matched based on client needs. The modules comprise:

- *Content Aware Protection* – gives organizations detailed control over sensitive data leaving their computers. Through close content inspection, transfers of important company documents are logged and reported. File transfers can be allowed or blocked based on predefined company policies, and can be applied to web, mail, cloud applications, instant messaging apps, file shares, and more. Contextual Detection is also available which offers an advanced way of inspecting confidential data based on both content and context. The Deep Packet Inspection functionality (currently available only on macOS) allows network traffic inspection at an endpoint level and offers a detailed content examination of file transfers.

- *Device Control* – gives organizations control over USB devices and peripheral ports' activity on employees' computers through a simple web interface. Organizations can implement strong device use policies that will scan data transfers to portable storage devices, or block their usage in order to protect sensitive data.

- *Enforced Encryption* – can be automatically deployed or manually installed on USB devices in the root folder, after which any data copied onto the device will be automatically

 

encrypted with government-approved 256bit AES CBC-mode encryption. The encrypted data can be accessed both on Windows and macOS endpoints.

- *eDiscovery* – offers the possibility to scan sensitive data at rest, stored on employees' endpoints based on specific file types, predefined content, file name, regular expressions or compliance profiles for regulations such as HIPAA, GDPR, PCI DSS and others. Scans can also take into account the proximity to dictionary keywords or Regular Expressions, as well as various thresholds. Based on the scan results, remediation actions can be taken, such as encrypting or deleting files that violate policies for data breach protection.

- *Mobile Device Management* – provides control over the use of Android and iOS mobile device fleets and macOS computers. It enables organizations to set security policies and access detailed tracking and asset management of all smartphones or tablets. It can also be used to push and monitor applications, network settings, and more.

Endpoint Protector enables seamless management of all organization endpoints, regardless of operating system, from a single dashboard.

**STRENGTHS**

- CoSoSys' Endpoint Protector offers strong coverage for Windows, macOS and Linux, with feature parity across platforms and a lightweight agent. This makes it a good choice for organizations running mixed OS environments.

- Endpoint Protector enables seamless management of all company endpoints from a single dashboard.

- CoSoSys offers diverse deployment options, including hardware appliance, or virtual appliance, thus meeting the needs of customers with a wide range of infrastructures.

- CoSoSys Endpoint Protector is easy to install and deploy through flexible policy management and an intuitive user interface.

 

- CoSoSys' Endpoint Protector solution is designed to also be easily managed by non-specialized technical personnel.

**WEAKNESSES**

- While CoSoSys offers its own solutions for mobility management (MDM and MAM), it does not currently offer a DLP component for these solutions. It does however, offer an SDK solution that can be used to extend DLP capabilities to mobile apps.

- CoSoSys currently offers OCR image analysis capabilities, but they only cover a limited number of languages.

- CoSoSys does not currently offer capabilities for detecting Drip-DLP. The vendor has this on its future roadmap.

- CoSoSys does not currently offer or integrate with CASB capabilities. The vendor has this on its future roadmap.

- CoSoSys lacks market visibility outside of Europe and Asia. The vendor is working to address that.

## SPECIALISTS

### FIDELIS CYBERSECURITY

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Fidelis is a cybersecurity technology company that offers automated threat detection, data protection and managed services. The company was originally known for its network DLP solutions, however, it has broadened its portfolio to the Automated Threat Detection and Response market for network, endpoint and cloud. The company is privately held through an investment from Marlin Equity Partners.

 

**SOLUTIONS**

Fidelis offers network DLP as a feature of **Elevate**, its broader automated threat hunting platform. Elevate comprises network, endpoint and deception modules which can be deployed in various form factors including on-premises, cloud, and hybrid models. Fidelis Elevate offers only DLP in motion through the monitoring of application, protocol and content data in sessions. The solution is largely OS agnostic.

Fidelis provides network DLP analysis through five network layer sensor locations (direct, internal, cloud, email and web) with the last two designed to integrate with third party email appliances and web proxy solutions as follows:

- *Fidelis Network Mail* – integrates in the SMTP conversation by providing full SMTP support through Fidelis' embedded MTA, as well as a Milter interface as an additional integration method for email hygiene solutions like Microsoft Office365, Cisco (i.e. IronPort), Proofpoint, SendMail and Postfix. It can be deployed in the Office365 cloud to provide DLP for mail, as well as email threat prevention and detection.

- *Fidelis Network Web* – integrates with standards-based Web Proxy and CASB solutions through an ICAP interface to add a DLP capability for proxy solutions like Symantec, Forcepoint, McAfee, Netskope, and others. The Fidelis Network sensor also allows monitoring of social networks for DLP, such as Twitter and Facebook, through its session inspection technology.

- *Fidelis Network Collector* – is an add-on component that stores network and content metadata for over 300 attributes plus custom tags from the sensors providing visibility into data leaks that occurred in the past (up to 360 days). The Collector allows the user to search, pivot and hunt on content and context for leakages on-demand or create scheduled automations. It also integrates with IP-to-ID solutions allowing for user attribution.

- *Fidelis Network Sensors* – include direct sensors at gateways for ingress and egress monitoring, indirect sensors for data center and internal monitoring, plus cloud sensors for virtual machine monitoring. Through Microsoft's VTAP (virtual network TAP) to Azure, Fidelis leverages Microsoft's VTAP (virtual network TAP) to Azure to monitor cloud network traffic natively between virtual machines without an agent. Fidelis also supports

 

Amazon's VPC Traffic mirror for cloud apps natively without an agent.

In addition, the Fidelis Cybersecurity Threat Research Team (TRT) regularly makes streaming policy updates available to customers based on ongoing research and machine learning. The policy updates are delivered to customers automatically via the Fidelis Insight Cloud service.

The Fidelis Elevate network sensors are configurable from a single management UI, called Command Post, that can be deployed on premises, in the cloud, or provided by Fidelis as a managed cloud service.

**STRENGTHS**

- Fidelis solutions can be deployed in various form factors including on-premises, cloud, and hybrid models, or as a managed detection and response (MDR) service.

- Fidelis offers a good set of out-of-the-box policies and rules for securing sensitive information. It recently extended its email DLP capabilities with OCR support.

- Fidelis offers DLP as part of a broader solution for network, endpoint, and deception post breach threat detection and response, which will appeal to organizations that want to deploy an integrated solution for compromise intelligence, detection and response automation.

**WEAKNESSES**

- Fidelis does not offer DLP for data-at-rest or data-in-use, focusing instead on DLP for data in motion, and bringing that together with its broader threat automation detection and response capabilities.

- Fidelis does not integrate with EMM/UEM mobile security solutions, and does not offer endpoint DLP.

- Fidelis does not currently offer visibility into encrypted traffic. However, the vendor has this on its future roadmap.

 

- Fidelis would benefit from increased integration and/or partnerships with CASB vendors, as customers are increasingly wanting to deploy a common set of policies across both DLP and CASB solutions.

## CLEARSWIFT

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Clearswift is an information security company with offices in the USA, UK, Australia, Germany and Japan with over 20 years of secure content, email and web security expertise. In 2017, Clearswift was acquired by Swiss defense company, RUAG and forms the product group for their Cyber Security Business Unit.

### SOLUTIONS

Clearswift offers a portfolio of solutions which can be peered together allowing customers to extend their hygiene solutions to provide advanced DLP features across their environment in a cost-effective manner. Clearswift products are available on hardware or as software (including vSphere and Hyper-V support.). Clearswift also sells its solutions in the cloud with AWS and Azure support, as a hosted or a managed service. The Clearswift portfolio includes:

- **SECURE Email Gateway (SEG)** – provides Adaptive DLP features (and strong hygiene features) that permit SMTP email to be scanned leaving and entering the company. Policy rules can be set to be granular to identify email from individuals, departments, or whole domains as required. DLP features include keyword search across headers, subject, body and attachments (which also includes document properties), file type matching including customer defined type files (including byte patterns, not just extensions). Optical Character Recognition (OCR) support is provided as an option. When used with the Information Governance Server (IGS) it also provides document/partial document matching. The SEG also supports the Adaptive Redaction features that can be used to reduce the overhead of minor violations by either redacting content such as keywords in a document, or sanitizing

 

documents (e.g. clearing document properties or change tracking in Documents that could hold sensitive information). Image threat mitigation includes bi-directional anti-steganography and image text redaction. Sensitive content that requires secure delivery can use built-in TLS options as well as message-based encryption methods such as S/MIME, PGP or password, as well as a portal-based encryption options (hosted or on-premise). The SEG supports AD integration and can provide rules that require end users to copy outbound emails to their managers or other compliance mailboxes. It can be deployed to augment Office 365 security. Through partnerships, Clearswift can deliver a broader integrated solution portfolio, which includes browser isolation and enterprise digital rights management.

- **SECURE Exchange Gateway (SXG)** – permits scanning of internal mail in a Microsoft Exchange environment using all of the same DLP features as the SEG. The SXG system allows large organization to compartmentalize content into their own business unit or region depending on their Microsoft Exchange topology. SEG and SXG, being both email based are also able to share message areas (i.e. quarantine stores), message tracking, as well as reporting for a richer administrative experience. Clearswift can also scan internal email in Office 365, providing extensive DLP functionality.

- **SECURE Web Gateway (SWG)** – features a HTTP proxy and content filtering engine that performs hygiene features and URL classification. Time based controls and quota-based control access to permit sites restrict the risks of Shadow IT and unauthorized data sharing. The SWG also supports HTTP/S interception so as to be able to inspect content using all of the available methods (as in SEG) to secure web sites from upload and download of sensitive data.

- **SECURE ICAP Gateway (SIG)** – can augment existing web filtering investments with Adaptive DLP specific policies for customers that have existing web proxy solutions, such as Symantec (Bluecoat), F5, Cisco, IBM or similar other ICAP-based solution. This variant can be used in both forward and reverse proxy modes.

- **Clearswift Endpoint DLP (CED)** – extends DLP to endpoints, by permitting what data can be written to external devices (i.e. data in use), as well as to perform scheduled scans of local, network shared or cloud drives (i.e. data at rest). It also provides granular device control and removable media encryption functionality.

 

- **Information Governance Server (IGS)** – acts as a central repository where end users can register sensitive information, and permits any of the Gateways to query the central store to check for and act upon potential data-in-motion breaches. IGS also provides information provenance reporting for compliance purposes, tracking granular information as well as whole files.

**STRENGTHS**

- Clearswift has strong content DLP capabilities and offers "adaptive redaction" remediation options that can automatically remove inbound and outbound sensitive data and threats, while leaving the remainder of the content intact to avoid impacting business productivity.

- Clearswift's DLP policy rules have an intuitive flow that is easy to use and provides additional drill-down options when necessary. The policies are shared across all communication channels to ensure consistent discovery of information.

- Clearswift offers Optical Character Recognition (OCR) support as part of its DLP functionality. This offers comprehensive support for image formats, including PDF scanned documents, and works with all major languages, including Japanese. Image text redaction is also available.

- Clearswift's Adaptive Redaction features remove content which breaks policy rules, including file metadata, revision history and active content, including macros and embedded executables. This mitigates data loss, unwanted data acquisition and risk from weaponized documents. Anti-steganography functionality also mitigates the image based threats of outbound exfiltration, as well as inbound malware payload delivery.

- Clearswift has an Information Governance solution which is fully integrated into their DLP solution, which enables tracking and policy management at an information level (rather than file level) across multiple communication channels.

 

### WEAKNESSES

- Clearswift's endpoint platform still needs to add endpoint DLP support for macOS and Linux. These are on the vendor's roadmap for 2020.

- Clearswift does not currently provide support for Instant Messaging networks (e.g. Teams/Skype for Business.). Social Network support is provided through a partnership with SecureMySocial.

- Clearswift currently provides mobile DLP support for iOS and Android only through a partnership with AirWatch.

- While Clearswift offers a strong DLP solution, the vendor lacks market visibility particularly in North America.

## ZECURION

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Zecurion, founded in 2001, offers security solutions that protect against information loss, as well as mitigate information risks, such as abuse of privileges by power users, external threats and more. The company is privately held, with headquarters in Moscow and New York and offices in Europe.

### SOLUTIONS

The Zecurion DLP solution monitors all local and network data leakage channels, intercepts all traffic leaving the corporate network, detects sensitive information being transmitted, and based on established security policies allows or restricts the transmission of data. All intercepted traffic is archived and further investigated for analysis of any data loss incidents. It supports analysis of over 500 file types and has the capability to block leakage in real time. The solution enables organizations to create flexible policies for different types of USB devices, different groups and

 

individual users. Zecurion is currently available for Windows, Mac, and Linux devices. The solution is available in different form factors including on-premises, cloud and hybrid.

Zecurion DLP is available through the following product components:

- **Traffic Control** (network DLP) – uses hybrid content analysis, combining digital fingerprints, Bayesian methods, and heuristic detection to filter outbound traffic and detect confidential data. It works over email, webmail, social networking, instant messaging, and other online channels to block the loss of sensitive information.

- **Device Control (Windows, Linux, Mac)** (endpoint DLP) – allows flexible control over the use of devices connected to ports (e.g. USB, LPT, COM, IrDA, IEEE 1394, PCMCIA, and internal devices), as well as built-in network cards, modems, Bluetooth, Wi-Fi, CD / DVD-drives, and local or network printers. It offers fine-grained controls beyond basic "allow/block" policies, through sophisticated policies combined with content analysis and encryption.

- **Traffic Control (Windows, Linux, Mac)** (endpoint DLP) - uses hybrid content analysis, combining digital fingerprints, Bayesian methods, linguistic analysis, regular expressions, data templates, heuristic detection, etc. to filter outbound traffic and detect confidential data. It works over email, webmail, social networking, instant messaging, and other online channels to block the loss of sensitive information.

- **Zecurion Storage Security** (data at rest DLP) – serves to securely protect data stored on servers and on backup media. The system encrypts the information contained on hard drives, disk arrays and SAN storage using a proprietary encryption method.

- **Zecurion Discovery** (data at rest DLP) – serves to detect sensitive, inappropriately stored information in file servers (shared folders), Microsoft SharePoint and Exchange servers, databases and document management systems (e.g. Oracle Database, Microsoft SQL Server, and IBM DB2), as well as workstations and laptop computers. It uses hybrid analysis to accurately determine the category of information and decide if it is stored in the proper place, based on corporate policy and on industry standards.

 

- **Zecurion Mobile DLP** – offers content analysis for Android devices. It provides complete monitoring of corporate information on employees' mobile devices, preventing data leaks at various stages of information processing, storage, and transfer. In the event of theft or loss, the device can be blocked by a security officer. The solution also stores shadow copies of SMS and MMS, as well as monitors the running of applications using black- and whitelists.

- **Zecurion DLP Cloud** – deploys DLP as a service with additional protection on the public cloud, where administrators can centrally manage keys and policies. It also helps sustain compliance as a centralized key management platform to demonstrate compliance with data security policies and compliance mandates, such as PCI-DSS and HIPAA.

Zecurion DLP uses a single web console to define and enforce policies across all endpoints, cloud solutions and mobile devices. The console offers pre-built policy templates, workflows, graphical reporting features and remediation capabilities to minimize the threat of data loss caused by internal threats. Policy management for Mac, Linux and Windows-based platforms is handled through the single management console.

**STRENGTHS**

- Zecurion Traffic Control controls over 250 different social media services, including Linkedln, Facebook, Google+ and Yahoo, as well as IM, web mail and file hosting. It also supports voice interception and file transfer capture over Skype (i.e. Teams).

- Zecurion provides full archiving of all data seen by endpoint agents, and can also capture screen shots and other end-user screen activities.

- Zecurion DLP includes a User Behavior Analytics (UBA) module, which includes self-learning analytics and policy violation predictions.

- Zecurion supports AI algorithms which can detect attempts to take smartphone photos of monitors or laptop screens.

**WEAKNESSES**

- Zecurion currently offers weak integration with SIEM systems.

 

- Zecurion offers only basic enforcement visibility through email alerts.

- Zecurion Mobile DLP is currently only available for Android devices.

- Zecurion's support for macOS is currently fairly basic and not on par with Windows functionality. The vendor has this on its roadmap.

- Zecurion needs to invest to raise its market visibility, particularly in North America.

## SAFETICA TECHNOLOGIES S.R.O.

Laubova 1729/8, 130 00 Prague 3
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www.safetica.com

Safetica Technologies offers solutions to protect sensitive data and help organizations meet regulatory requirements. The company is headquartered in Prague, Czech Republic, with a worldwide distribution network and global customer base.

### SOLUTIONS

**Safetica DLP** provides DLP and auditing capabilities for Windows platforms, and a limited set of features for macOS platforms. Safetica also offers an MDM solution with file auditing capabilities for Android devices, as well as an MDM solution for iOS platform. Safetica offers on-premises, public or private cloud server deployment options. Endpoint protection can be deployed either manually, or automatically via standard remote management tools such as GPO policy, LanDesk, or specialized tools such as ESET Remote Administrator (ERA). While Safetica is distributed as a single package, individual parts of the system can be configured individually. The platform offers the following capabilities:

- *Data in use* – Data in use protection with flexible configurable levels of granularity and strictness. Applicable to files, applications, devices, cloud services, network storage and all common port and protocols.

 

- *Data in motion* – Complete data in motion auditing and protection cross-channel capabilities available for both encrypted and unencrypted communication. Integration is also provided with third-party gateways such as FortiGate, FortiMail, and others.

- *Data at rest* – Context-based scanning for all file types, content-based scanning for supported formats. Third-party data classification integration. All data manipulation can be logged. Centralized file download for forensic purposes is also available.

- *Policy controls* – the solution comes with one-click templates for chosen regions and/or regulations.

- *Mobile DLP* – Safetica Mobile offers auditing and basic security tools on mobile devices. The solution is fully integrated with the Safetica DLP infrastructure, but enforcement of DLP policies on mobile devices is still on the roadmap.

- *Encryption* – Safetica offers centralized full disk encryption management for BitLocker along with portable device data encryption management to prevent BYOD risks. Safetica also detects other encryption solutions, such as ESET encryption.

- *Drip-DLP* – Safetica monitors slow- or cumulative-sensitive data leaks by evaluating all transferred data from each individual source or to each individual destination, with instant alerts to administrators.

The **Safetica Management Console** offers centralized policy handling, and is used to maintain Safetica installations, set security policies, manage deployed endpoints or display monitored data to administrators.

**STRENGTHS**

- Safetica DLP is easy to deploy and maintain.

- Safetica DLP is designed to address a broad set of use cases, including intellectual protection, regulatory compliance, user behavior analysis, and security audits.

 

- Safetica DLP offers high visibility into the data flow and any related security risks, with advanced capabilities, such as hidden mode, protection against agent manipulation, administrative audit logs, and more.

- Safetica benefits from a highly developed partner network, to help integrate the solution fully with customer environments.

- Safetica DLP is attractively priced for mid-size and SMB environments.

**WEAKNESSES**

- Safetica focuses on the SMB market, and has limited support for very large enterprise deployments (i.e. >10,000 seats).

- Safetica DLP currently lacks support for Linux endpoints.

- While Safetica DLP currently supports administration and alerts in nine languages, additional language support would be beneficial.

- Safetica DLP currently supports only basic CASB integration, with regards to data security in Office 365 and integration with Azure Information Protection classification. More advanced integration with CASB solutions would be beneficial.

- Safetica lacks market visibility, particularly in North America.

## SEARCHINFORM

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Moscow, Russian Federation

SearchInform is an information security company focusing on cybersecurity threats, protecting business and government institutions against data theft and harmful human behavior. The company is headquartered in Moscow, with offices worldwide.

 

**SOLUTIONS**

**SearchInform DLP** offers information security across a wide range of communication channels, and provides privileged user management, work efficiency controls, user behavior monitoring and more. The solution provides real time analysis of virtually all information flows to prevent data theft or leakage. It also helps to prevent harmful activities by insiders, such as fraud, corruption, espionage, sabotage, changes in/abuse of access rights, and more. SearchInform DLP offers a client-server architecture, where client applications are deployed on monitored devices (e.g. desktops, servers, network switches and other equipment) while the server part can be deployed on-premises, in the cloud, or hybrid. Platforms supported include Windows and Linux. The platform offers the following capabilities:

- *Data in Use* – file control (i.e. opening, creating, changing, deleting, etc.), program control (i.e. control of time spent in application and on web sites), print controller for local or network printing, device controller, data encryption, monitor control for screen control, web camera controls, microphone controls, and key logger controls.

- *Data in Motion* – includes cloud storage (e.g. Amazon S3, Evernote, Dropbox, Microsoft Office 365, Microsoft OneDrive, Google Docs, and more). It also provides control for FTP, HTTPs, email solutions (i.e. IMAP, MAPI, POP3, SMTP, NNTP, WebMail), Instant Messaging (e.g. Skype, ICQ, MMP, Jabber, MSN, Telegram, WhatsApp, Viber and more), and social networks (i.e. Facebook, LinkedIn, and others).

- *Data at rest* – the ability to monitor and analyze files on PCs, network storage, NAS, databases, Microsoft SharePoint, and more.

- *Cloud Data* – the ability to check cloud storage information for compliance with security policies and monitor communication in the corporate infrastructure. Three technologies are currently available: control of data transfer between cloud services and corporate PCs; control of data exchange within the corporate network (from any connected device); and control at the cloud service level.

- *Policy controls* – the solution comes with out-of-the-box security policies for a wide range of use cases and targeted at the needs of specific vertical industries. Additionally, SearchInform specialists will work with customers to create custom policies that meet specific needs.

 

- *Drip-DLP* – SearchInform offers proprietary technology for content analysis and is able to single out data leakage incidents in streams of data of any size.

- *Forensic suite* – is a set of technologies that provide for detailed reconstruction of violations for official investigations. Violations of security policies can be supported through a video recording of user actions, audio recording of sound activity at the PC, file system activity, data audit on active processes or web browser tabs, as well as data from a webcam for biometric identification of the violator. In addition, visualization tools are included to help visualize violations on a user relationship chart, or reconstruct the route of data flow through network channels from the time the data was created until when it left the corporate environment.

**STRENGTHS**

- SearchInform offers a scalable solution which can scale to thousands of endpoints under control.

- In addition to DLP, SearchInform offers a strong set of forensic technologies which assist in reconstructing user activity and violations activity.

- SearchInform offers strong image analysis capabilities through OCR and its own image analysis technology.

- SearchInform DLP monitoring covers a wide range of communication channels that include all traditional channels, as well as complex emerging new channels such as Instant Messaging and social media.

- SearchInform has been quick to update its solution to monitor and analyze data from an increasing number of data sources.

**WEAKNESSES**

- SearchInform currently lacks support for macOS devices.

- SearchInform does not provide CASB integration capabilities.

 

- SearchInform does not provide mobile DLP capabilities, either on its own or through integration with MDM or EMM vendors.

- SearchInform lacks market visibility outside of Russia and Central Europe. The vendor is working to address that.

## FALCONGAZE

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Falcongaze, founded in 2007, offers information security solutions for Data Loss Prevention, as well as monitoring of personnel activities and archiving of business communications. The company is based in Russia, with a strong presence in Eastern European countries. The company is privately held.

### SOLUTIONS

Falcongaze's flagship DLP solution is **SecureTower**, an enterprise solution which provides functionality for user monitoring and analysis. SecureTower can intercept a vast range of corporate communication and data transfer channels, as well as detect sensitive content using various content-aware detection techniques. Linguistic analysis tools include contextual analysis based on dictionaries and morphological analysis. SecureTower can be deployed on-premises, cloud, or as a hybrid solution. Server components can be deployed on both Windows and Linux, whereas endpoint agents are only available for Windows OS.

SecureTower can provide statistical analysis, based on customized rules, on the number of messages, emails and files sent, web activity, computer and application activity. Extended regular expressions provide efficient search of data, such as: addresses, phone numbers, SSN, ID, bank account numbers, and more. Hash computation is used to detect the presence of protected files on users' computers, and digital fingerprinting of sensitive content allows detection of transfer of whole files, or parts of its contents.

 

SecureTower provides control over the following data channels:

- *Email messages* – sent via POP3, SMTP, IMAP and MAPI protocols, Microsoft Exchange Server, Lotus Notes/Domino, Postfix, Sendmail and other mail systems.

- *Web-traffic* – provides information about websites visited by employees, time spent and messages sent in relation to website activity.

- *Instant Messaging* – including OSCAR, XMPP (Jabber), YIM, SIP, Skype text/voice messages and files, Viber, Telegram, MS Lync, WhatsApp, Google Talk, and more.

- *Social Media* – control of online chats, blogs, forums including Facebook, Slack, as well as other social networks frequently used for business communication.

- *Files and documents* – transferred via FTP, FTPS, HTTP and HTTPS protocols, as well as email attachments.

- *SSL traffic* – transmitted over encrypted protocols (e.g. HTTPS, FTPS, SSL for POP3, SMTP, etc.), as well as HTTP and HTTPS traffic sent via the ICAP protocol to corporate proxy servers.

- *Cloud storage and Databases* – including MS SQL Server, Oracle, PostgreSQL, SQLite, MySQL contents, Dropbox, OneDrive and others.

- *External devices* – data transferred to external devices, such as USB storage devices, external HDDs, and others. Including computer and terminal server network resources, printed documents and images, speech recognition engines, OCR engines, IP telephony (i.e. voice and text via the SIP protocol), and more.

SecureTower also provides the ability to detect Drip DLP through the use of statistical safety rules (for adjustable time periods) that detect the slow leaking of information by monitoring sensitive data over multiple transfer instances.

Management is provided through two consoles: an administrator console, for IT personnel that serves to configure the server components; and a client console, that allows security officers to

 

set up rules, view reports, investigate incidents, and more.

**STRENGTHS**

- SecureTower provides an extensive set of tools for personnel and business process analysis, as well as tools for investigating security incidents.

- SecureTower provides extensive capabilities for monitoring user activity and social interactions.

- SecureTower is simple to deploy and maintain, with many customer use cases covered out-of-the-box.

- SecureTower is a modular solution which allows customers to deploy only the components that best meet their needs.

- SecureTower provides support for detecting Drip DLP.

**WEAKNESSES**

- SecureTower's endpoint agent is currently only available for Windows. Agents for macOS, Linux, and mobile platforms (i.e. iOS and Android) are on the vendor's roadmap.

- Integration with third-party SIEM solutions is not available.

- While SecureTower provides some basic (i.e. access/read-only/block) controls on cloud storage, but it does not currently provide context-aware monitoring of users activity while accessing cloud storage.

- SecureTower lacks market visibility outside of Russia and Central Europe. The vendor is working to address that.

 

# MATURE PLAYERS

## FORCEPOINT

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Forcepoint, is a Raytheon and Vista Equity Partners joint venture, formed in 2015 through the merger of Websense and Raytheon Cyber Products. Forcepoint offers DLP, web, data, and email content security, cloud access security, next generation firewall, user behavior analysis, insider threat detection, and threat protection solutions to organizations of all sizes.

### SOLUTIONS

Forcepoint offers three types of DLP solutions: **DLP for Compliance**, **DLP for IP Protection,** and **Dynamic Data Protection**. The IP Protection package includes the Compliance feature set, plus structured and unstructured data fingerprinting, machine learning classifiers, and a DLP Analytics virtual appliance. Forcepoint Dynamic Data Protection bundles DLP Endpoint with a behavioral analytics module, to dynamically apply monitoring and enforcement controls to protect data based on calculated behavioral risk level of users and the value of data being accessed. This helps reduce the amount of alerts requiring investigation, and implements risk-based active data protection controls.

Forcepoint DLP is available in the following components, as well as a combined Forcepoint DLP Suite consisting of the Endpoint, Network and Discover elements:

- **Forcepoint DLP Endpoint** – protects data on endpoints in the enterprise covering Windows, and macOS operating systems. The solution addresses data in motion, data in use, and data at rest use cases. It integrates with Microsoft Information Protection (MIP) to analyze encrypted data and apply DLP controls. It helps monitor web uploads (including HTTPS), as well as uploads to cloud services, such as Microsoft Office 365, and Box Enterprise.

 

- **Forcepoint DLP Cloud Applications** – extends DLP policies into cloud applications, including Microsoft Office 365, Google G Suite, Box, ServiceNow, and Salesforce. The solution addresses data in motion, data in use, and data at rest use cases.

- **Forcepoint DLP Network** – monitors data that is being sent outside of an organization's network and applies the appropriate policies. It can alert, block, notify, audit, and quarantine data in web, email, FTP, IM, and other channels. It helps identify and prevent malicious or accidental data loss from outside attacks, as well as from insider threats. It provides integrated OCR for a wide range of languages.

- **Forcepoint DLP Discover** – scans for confidential data within an organization via agent-based and agent-less methods. Data is scanned on file servers, databases, collaboration platforms (e.g. SharePoint), and email servers both on-premises or in the cloud. Content can be encrypted, removed, quarantined, audited, or have other actions take place. It supports fingerprinting technology to identify regulated data and intellectual property at rest and protect the data through encryption and other controls. It provides integrated OCR for a wide range of languages.

**STRENGTHS**

- Forcepoint supports deployment of DLP management and data classification components on-premises and in public clouds (i.e. Microsoft Azure, and Amazon AWS).

- In addition to Microsoft Windows, Forcepoint also offers support for Apple macOS and Linux systems, including detection of fingerprinted structured and unstructured data.

- Integration with Forcepoint CASB enables DLP policies to be extended to enterprise cloud applications via a cloud hosted service. This hybrid approach enables incident and forensic data to be secured in a private data center, while policy enforcement can be done in the cloud.

- Forcepoint provides detection of Drip DLP across endpoint, cloud and network DLP components.

 

- Forcepoint provides an integrated security analytics solution which is used to identify high risk interactions with sensitive data, and present a prioritized view of DLP cases with risk scores to security operations teams.

**WEAKNESSES**

- Forcepoint OCR is currently limited to network discovery and data in motion (i.e. web, email and ICAP). Forcepoint is planning to extend OCR support to additional DLP components as part of their roadmap.

- The Forcepoint DLP Endpoint capabilities for Linux are currently not as developed as other operating systems.

- Forcepoint currently only provides data in motion integrated encryption capabilities for removable media. It also supports email encryption when combined with Forcepoint Email Security.

- Forcepoint has lost market visibility in the past year, and is not seen in deals as frequently as other vendors.

 

## THE RADICATI GROUP, INC.
## http://www.radicati.com

The Radicati Group, Inc. is a leading Market Research Firm specializing in emerging IT technologies. The company provides detailed market size, installed base and forecast information on a worldwide basis, as well as detailed country breakouts, in all areas of:

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- **Unified Communications**
- **Mobility**
- **Web Technologies**

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| Email Market, 2019-2023 | Apr. 2019 | $3,000.00 |
| Cloud Business Email Market, 2019-2023 | Mar. 2019 | $3,000.00 |
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| Instant Messaging Statistics Report, 2019-2023 | Jan. 2019 | $3,000.00 |
| Mobile Statistics Report, 2019-2023 | Jan. 2019 | $3,000.00 |
| Endpoint Security Market, 2018-2022 | Nov. 2018 | $3,000.00 |
| Secure Email Gateway Market, 2018-2022 | Nov. 2018 | $3,000.00 |

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| Title | To Be Released | Price* |
|---|---|---|
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| Email Statistics Report, 2020-2024 | Feb. 2020 | $3,000.00 |

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