

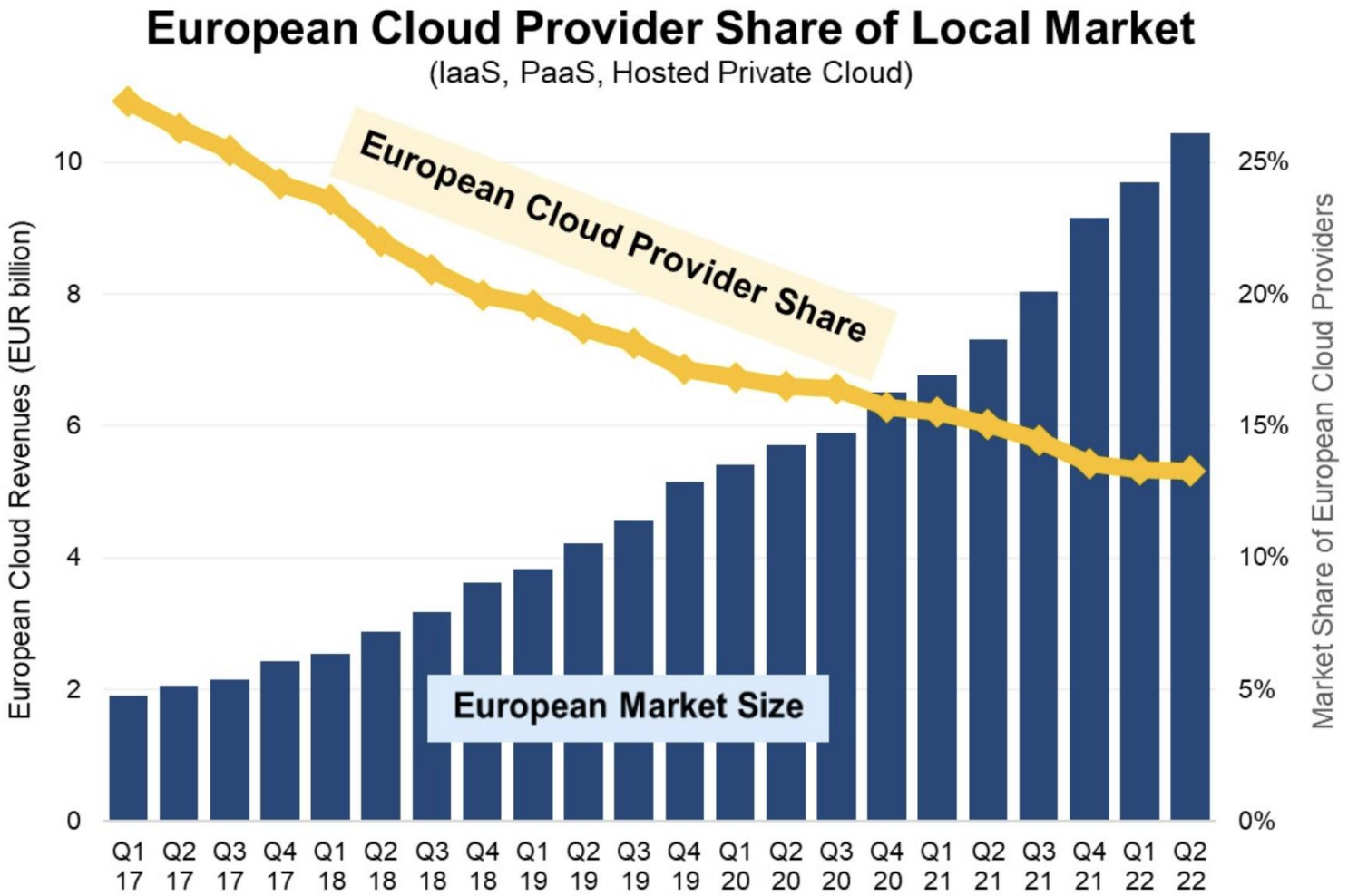


Random Thoughts on the EU Cloud Security Market

Cloud Security Alliance

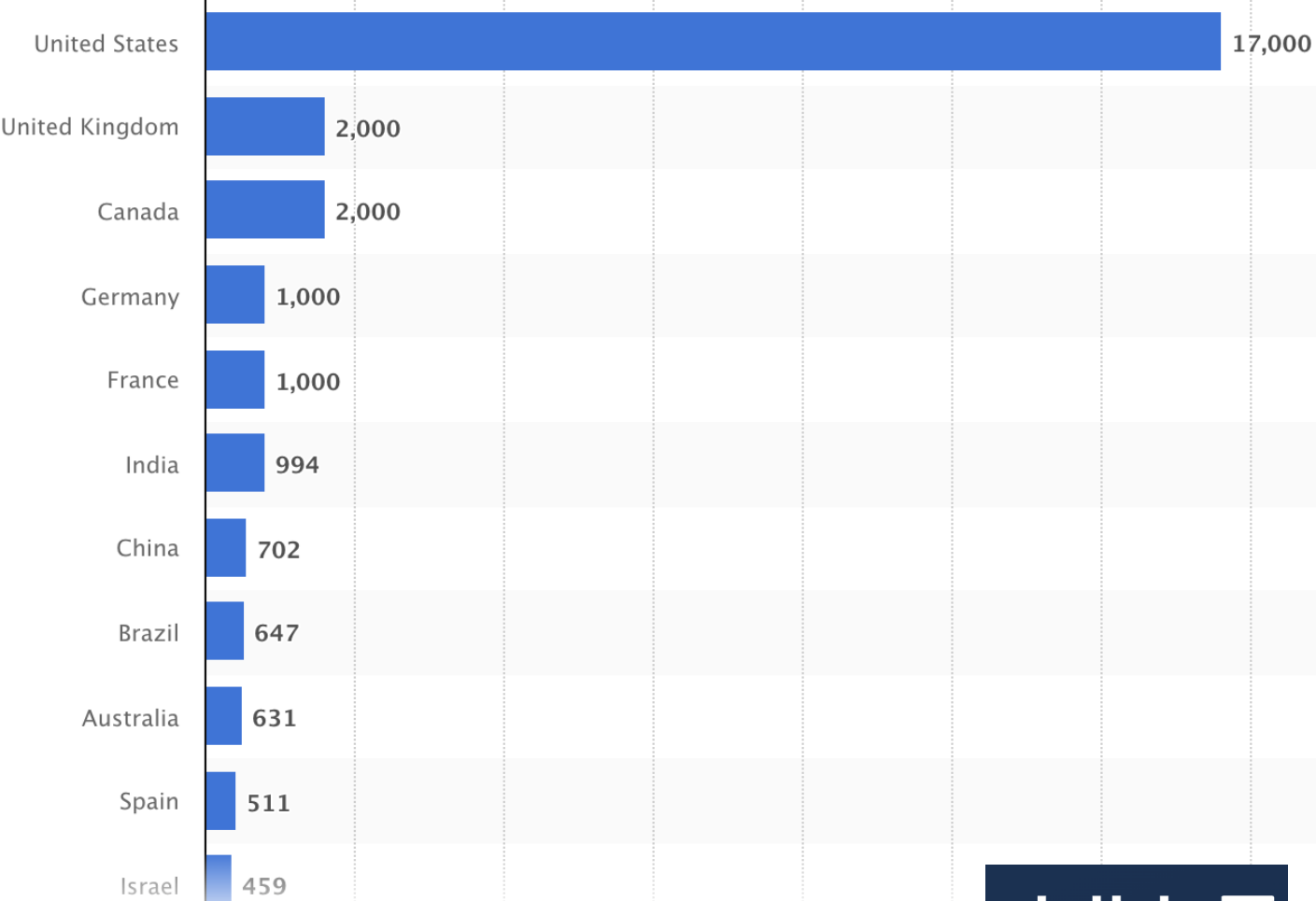
Daniele Catteddu, Chief Technology Office, Cloud Security Alliance

Growing Market but Still Lose Market Share



Source: Synergy Research Group

Leading SaaS Countries Worldwide in 2022



Network & Infrastructure Security

Advanced Threat Protection: Palo Alto, Cisco, Fortinet, Sophos, Trend Micro, etc. NAC: Aruba, Cisco, Fortinet, etc. SDN: Cisco, VMware, etc. DDoS Protection: Cloudflare, Akamai, etc. DNS Security: Cloudflare, etc. Network Firewall: Palo Alto, Cisco, Fortinet, etc. SASE: Cisco, Fortinet, etc.

Web Security

ICS + OT: APERIO, Belden, etc. Web Security: Barracuda, Cisco, Fortinet, etc. Network Analysis & Forensics: Awake, etc.

Endpoint Security

Endpoint Prevention: Avast, Avira, etc. Endpoint Detection & Response: CrowdStrike, SentinelOne, etc.

Application Security

WAF & Application Security: Akamai, Cloudflare, etc. Application Security Testing: Burp Suite, etc.

MSSP

Traditional MSSP: AT&T, Atos, etc. Advanced MSS & MDR: Atos, etc.

Data Security

Encryption: Symantec, etc. Data Privacy: OneTrust, etc. Data Centric Security: Druva, etc.

Mobile Security

Mobile Security: BlackBerry, etc.

Risk & Compliance

Risk Assessment & Visibility: Arxium, etc. Risk Quantification: ArceGen, etc. Pen Testing & Breach Simulation: Bugcrowd, etc. GRC: Arxium, etc. Security Awareness & Training: Arxium, etc.

Security Ops & Incident Response

SIEM: Splunk, etc. Security Incident Response: Arxium, etc.

Threat Intelligence

Threat Intelligence: Anomali, etc.

IoT

IoT Devices: Arxium, etc. Automotive: Arxium, etc. Connected Home: Arxium, etc.

Messaging Security

Messaging Security: Arxium, etc.

Identity & Access Management

Authentication: Okta, etc. IDaaS: Okta, etc. Privileged Management: CyberArk, etc. Identity Governance: SailPoint, etc. Consumer Identity: Okta, etc.



Security Incident Response

Security Incident Response: Arxium, etc.

Digital Risk Management

Digital Risk Management: Arxium, etc.

Blockchain

Blockchain: Arxium, etc.

Security Analytics

Security Analytics: Arxium, etc.

Security Consulting & Services

Security Consulting & Services: Arxium, etc.

Fraud & Transaction Security

Fraud & Transaction Security: Arxium, etc.

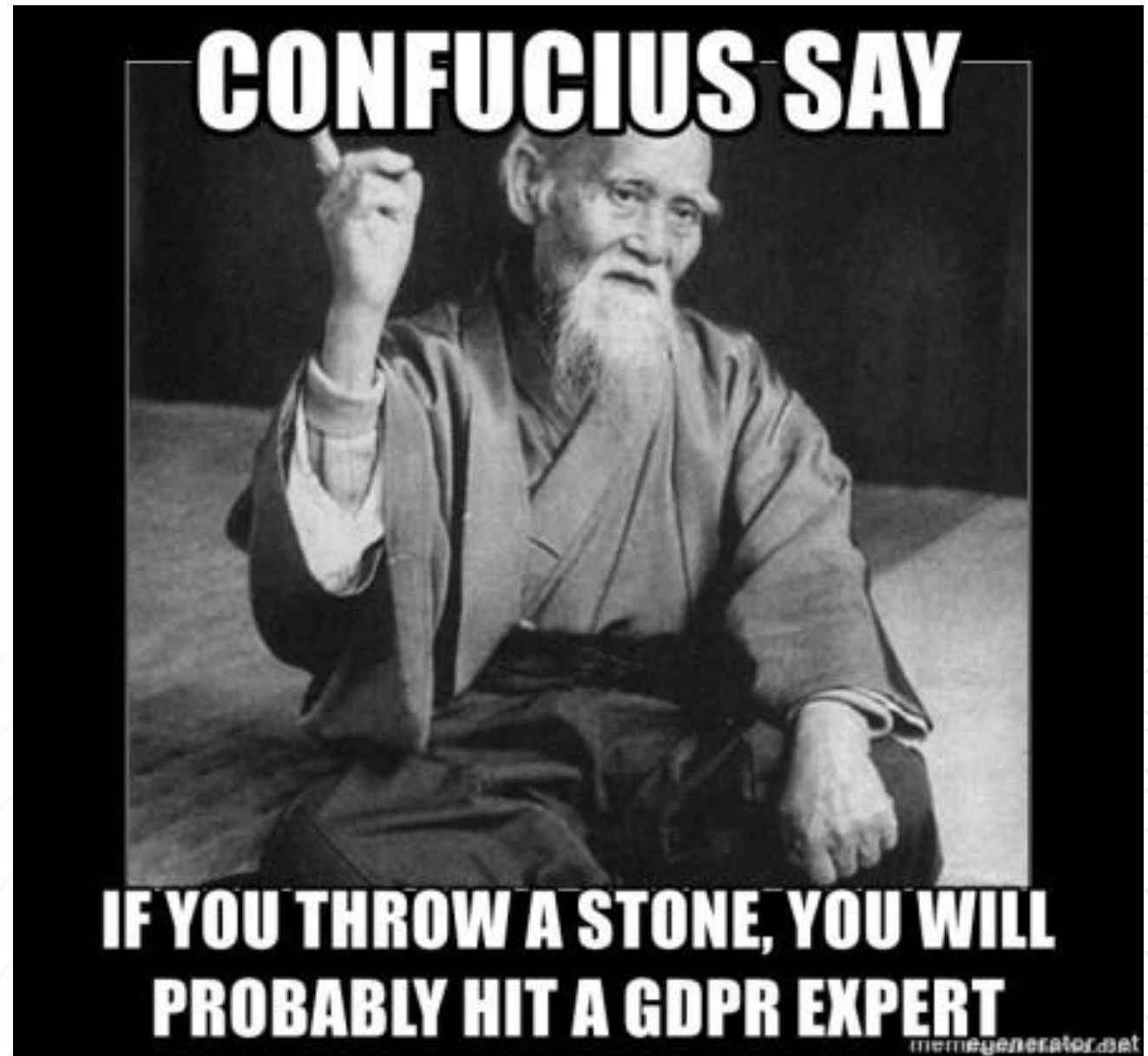
Cloud Security

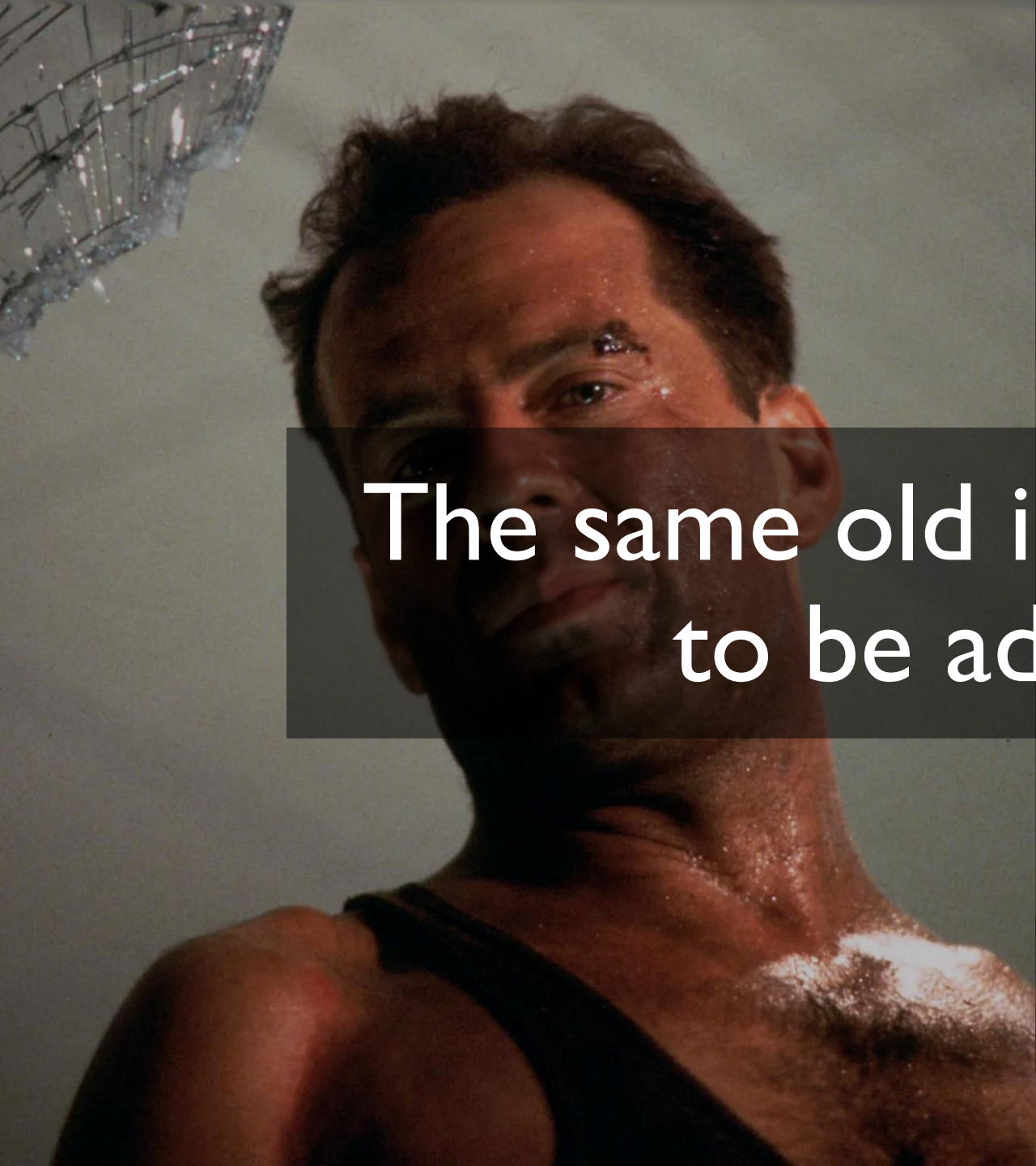
Cloud Security: Arxium, etc.

Running after USA Companies

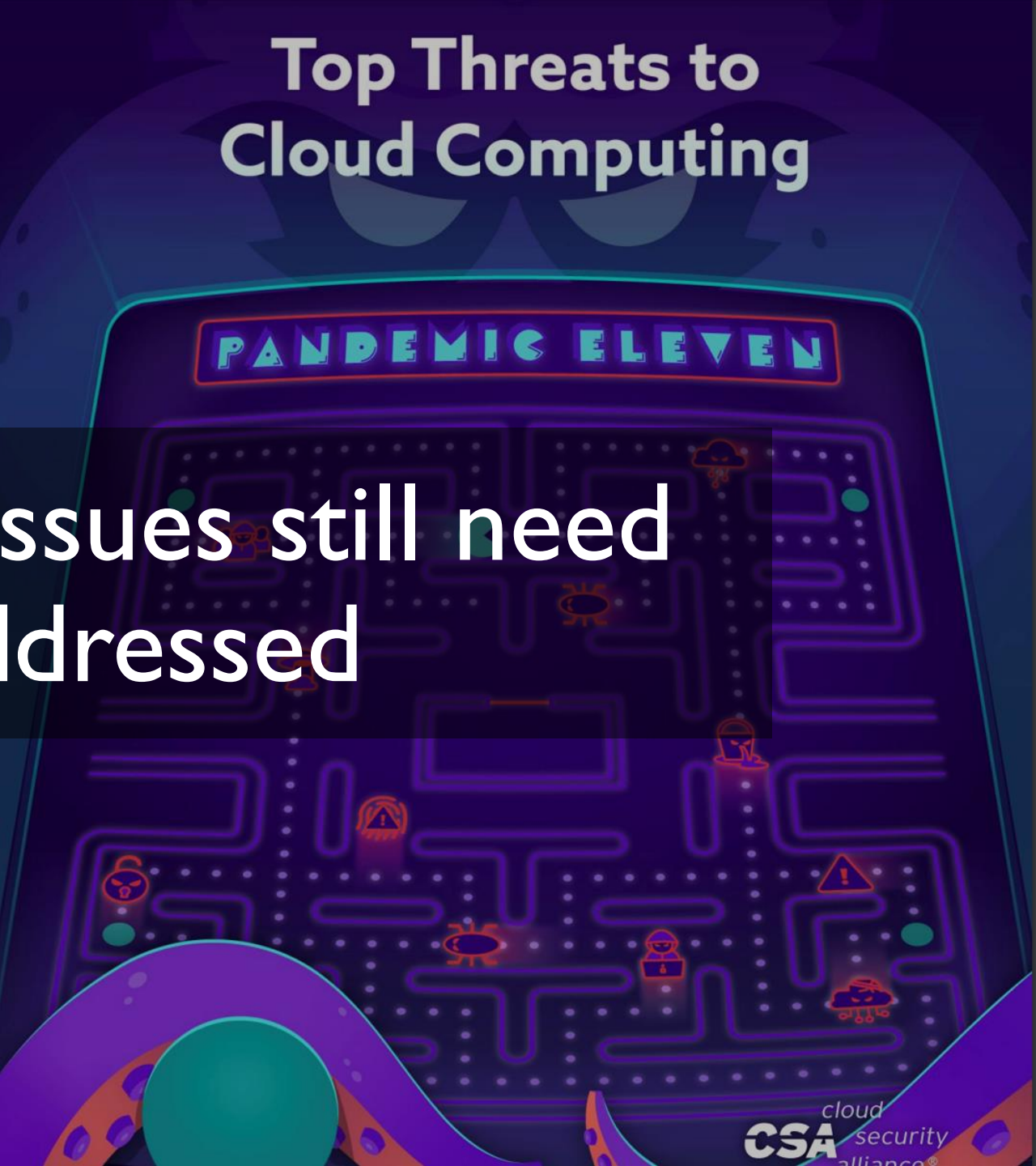


Legislation Driven Innovation





The same old issues still need to be addressed



Top Threats to Cloud Computing

PANDEMIC ELEVEN

Technology Trends





Market Heterogeneity

New Strategies & Approaches

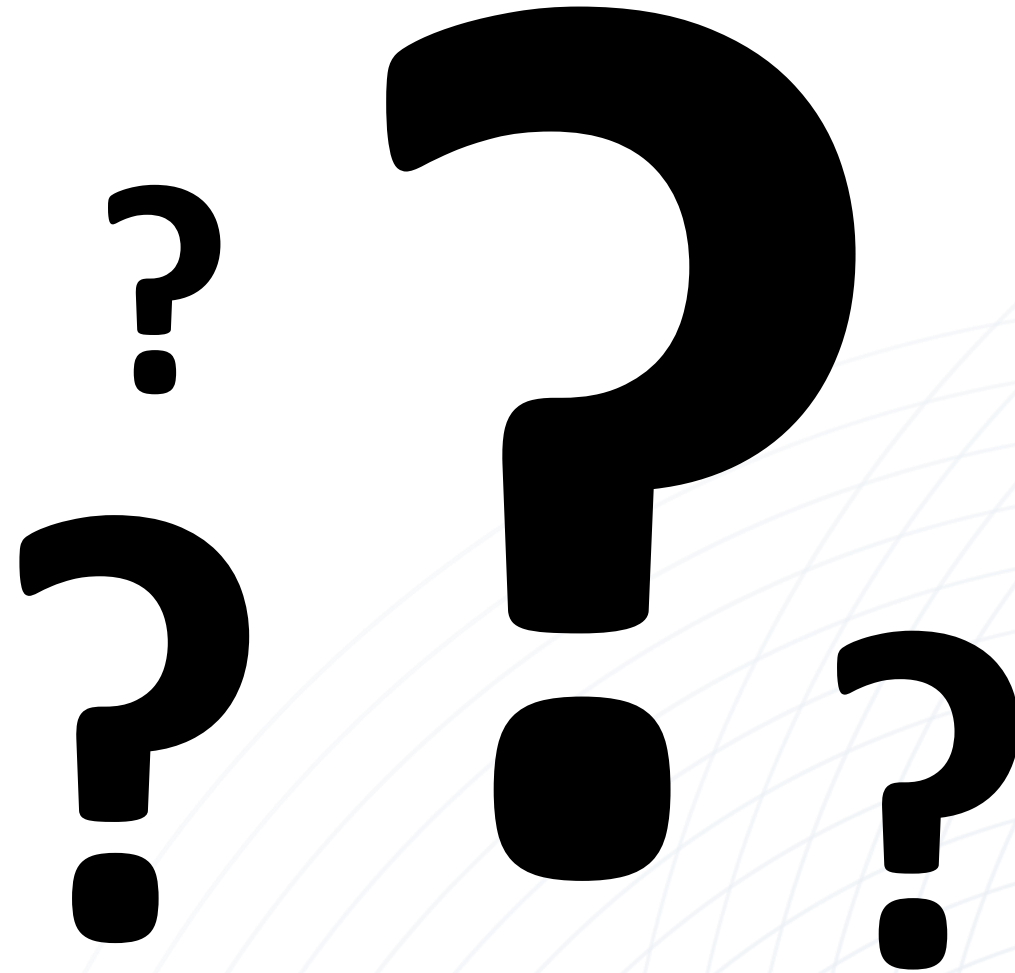
ZERO TRUST

Education and Professional Accreditation



Take aways

- Legislations and Political barriers cannot be drivers for innovation and market success.
- Most existing Cyber Security start-ups are USA/Israel/UK based; the EU market needs an acceleration.
- Possibly existing EC multiannual research programs need some adjustments
- Cloud Market is now mature, and it is very heterogenous; this is a tremendous opportunity for the EU, especially in the SMEs market segment.
- The most impactful cloud threats are basic security issues related to Identity/Misconfigurations/Security Hygiene/Lack of strategies; there is room for innovation at scale to address these issues.
- Confidential Computing, Industry 4.0, Quantum-Safe Security, DLT, and AI, are big opportunities that we cannot miss and have the potential to rebalance the technology supremacy game.
- Zero Trust is a philosophy and principled-based strategy; the EU excels in a principles-based approach, so let's not miss the opportunity.
- The professional education and accreditation market is not fully functional; we need innovative solutions and better ways to measure skills and expertise.



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