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China Information Security Industry Report, 2012-2014

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Abstracts

In the recent years, the growing number of information security events worldwide have caused huge losses to countries and enterprises, and therefore, governments and companies have attached increasing importance to the management on information security. In the meantime, the rapid evolution of new businesses such as mobile internet, the internet of things and cloud computing also brings new market development room for information security industry. The issue of information security has gradually aroused the attention of all governments, and many nations have already released the corresponding policies and bills, in a bid to push forward the development of cyberspace security and to spur robust growth of the overall security market. In 2010, gloal information security market size was close to USD70 billion, and the figure is expected to surpass USD85 billion in 2016.

In the IT sector, the United States is in the leading position around the globe, and it also enjoys absolute superiority in the field of information security technologies. Generally speaking, the United States is far ahead of other countries in information security basic theory, information security technology and cryptography technology, involving the renown companies with sound reputation like Symantec, EMC(RSA), IBM, Juniper, Cisco, McAfee, and WebSense in the world’s information security industry.

European Union staged a wave of information security legislation at the outset of the 21th century, driving the growth of local European information security companies represented by Aladdin Information & Technology, Panda Security, CheckPoint, Kaspersky, etc.

China lags behind European and American countries in terms of IT applications, and there is just a decade or more development history of information security in real sense in China. However, Chinese information security industry has embraced rapid progression in the recent years, with its market size showing a sustained high-speed

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growth tendency. In 2008, the market scale of Chinese information security industry approximated RMB8 billion and then in 2011 the figure rose to RMB15 billion.

As far as the technology is concerned, the level of Chinese information security industry is basically in line with the world's, and its attack and defense technology is up to the world's advanced level, but China's informatization degree is still quite low, with a small market size as a whole and imperfect industrial chains. The international companies are confident about Chinese market outlook and increase their investments in China, pricking up competition among high-end subscriber groups. At the same time, some suppliers with capital strength take security business as their next market growth engine. Although the accession of numerous manufacturers into security market can stimulate all-round competition among industrial players and selects the superior and eliminate the inferior, the competition for talents and resources will become more and more fierce in the short run.

The report covers six chapters and 119 charts, and highlights the development of Chinese information security industry in 2011-2012 and the operation of ten typical Chinese information security companies.

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