

## Microsoft Frees Up Its Consumer Security Software Product

Arabella Hallawell, Neil MacDonald, Peter Firstbrook

Microsoft's free consumer security offering, Microsoft Security Essentials, will spur more free offerings from its competitors. But Gartner expects adoption to be slowed by users' preference for security-focused vendors.

## NEWS ANALYSIS

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### Event

On 23 June 2009, Microsoft released a beta version of its free consumer antivirus and anti-spyware offering, Microsoft Security Essentials (MSE; previously code-named "Morro"). MSE will replace Windows Live OneCare, which will be phased out.

### Analysis

MSE represents Microsoft's attempt to gracefully exit the paid consumer security software market, where the company had trouble positioning OneCare against offerings from Symantec, McAfee and other security vendors. MSE will be a free download available on a new Security Essentials Web site to anyone with a valid copy of Windows.

Users' appetite for free, basic signature-based antivirus applications is expanding. Such applications are already available from numerous other vendors — such as Symantec and McAfee, and fast-growing regional vendors such as AVG Technologies and Avira — primarily as a loss leader for more advanced, fee-based suites, which security-conscious users are willing to pay for. While some users may be attracted to a free product that does not expire, market momentum continues to support security-focused vendors, including those which can support non-Windows platforms, especially Macintosh.

Microsoft nonetheless has the opportunity to alter the consumer security market. Gartner would consider its endeavor toward that end a failure if Microsoft was unable to capture at least 20% of new and existing consumer desktop security users in the U.S. and European Union markets within two years of product launch. Gaining traction in emerging markets may be more difficult, given that Windows piracy rates exceed 75% in some countries. However, if Microsoft does not fund a significant marketing and advertising campaign, and does not use the distribution channel of Security Center, we expect its impact to be minimal. In addition, in Gartner's opinion, Microsoft has been slow in updating enterprise security products with competitive features; for example, enhanced management and host intrusion prevention system (HIPS) capabilities are still not available in Forefront Client Security, and content filtering for outbound attachments is not available in Forefront Online Security For Exchange. And while MSE will contain anti-rootkit protection, it does not offer protection against new Web-based threats, which are the prime vector for infection, as competitors like AVG do. To be influential in this market, Microsoft must also invest in advanced protection against new, unknown threats. Nevertheless, we expect the introduction of MSE will spur the competition to also offer free, signature-based, antivirus-only products, and will require vendors to work harder to get consumers to upgrade to premium offerings.

## RECOMMENDATIONS

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### Enterprises:

- View the availability of free signature antivirus-only consumer offerings as a warning sign that your endpoints must be augmented with proactive mechanisms and your e-mail and Web gateways protected against malicious code that signature-based engines cannot reach.

- Consider incorporating MSE or other free antivirus solutions as a free alternative within network access control health checks on virtual private network (VPN) gateway connections; as an alternative, unprotected users could be directed to the MSE site.
- Windows-centric offices with fewer than five PCs should consider MSE or other free antivirus offerings as a low-cost alternative for anti-malware protection; however, be aware that detection rates for antivirus-only solutions and lack of central management will likely lead to increased infection rates.

## RECOMMENDED READING

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- "Magic Quadrant for Endpoint Protection Programs" — Endpoint protection program vendors are competing on the strength of non-signature-based defenses, proactive management capabilities and data protection. **By Peter Firstbrook, Arabella Hallawell, John Girard and Neil MacDonald**
- "Web Site Trust Seals: Less Than Meets The Eye" — Rather than relying on a trust seal for marketing purposes, companies should invest in improving the security of their Web sites. **By Arabella Hallawell and Avivah Litan**

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## REGIONAL HEADQUARTERS

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### **Corporate Headquarters**

56 Top Gallant Road  
Stamford, CT 06902-7700  
U.S.A.  
+1 203 964 0096

### **European Headquarters**

Tamesis  
The Glanty  
Egham  
Surrey, TW20 9AW  
UNITED KINGDOM  
+44 1784 431611

### **Asia/Pacific Headquarters**

Gartner Australasia Pty. Ltd.  
Level 9, 141 Walker Street  
North Sydney  
New South Wales 2060  
AUSTRALIA  
+61 2 9459 4600

### **Japan Headquarters**

Gartner Japan Ltd.  
Aobadai Hills, 6F  
7-7, Aobadai, 4-chome  
Meguro-ku, Tokyo 153-0042  
JAPAN  
+81 3 3481 3670

### **Latin America Headquarters**

Gartner do Brazil  
Av. das Nações Unidas, 12551  
9º andar—World Trade Center  
04578-903—São Paulo SP  
BRAZIL  
+55 11 3443 1509