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Web 2.0: A Complex Balancing Act



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Web 2.0
A Complex Balancing Act
The First Global Study on Web 2.0
Usage, Risks and Best Practices

RATIONALE

Social media explosion

Cost cutting

Increased compliance

Global operations



Goal:
Assess Global trends in Web 2.0 adoption, including the drivers and barriers, security threats, and policies and practices around the globe.

Survey (N=1055) CEO/CIO's in 17 countries:

U.S., UK, Australia, Canada, Japan, Singapore, India, Germany, France, Italy, Spain, Poland, Benelux, Sweden, Brazil, Mexico, & UAE

June-July 2010 (19% response rate)

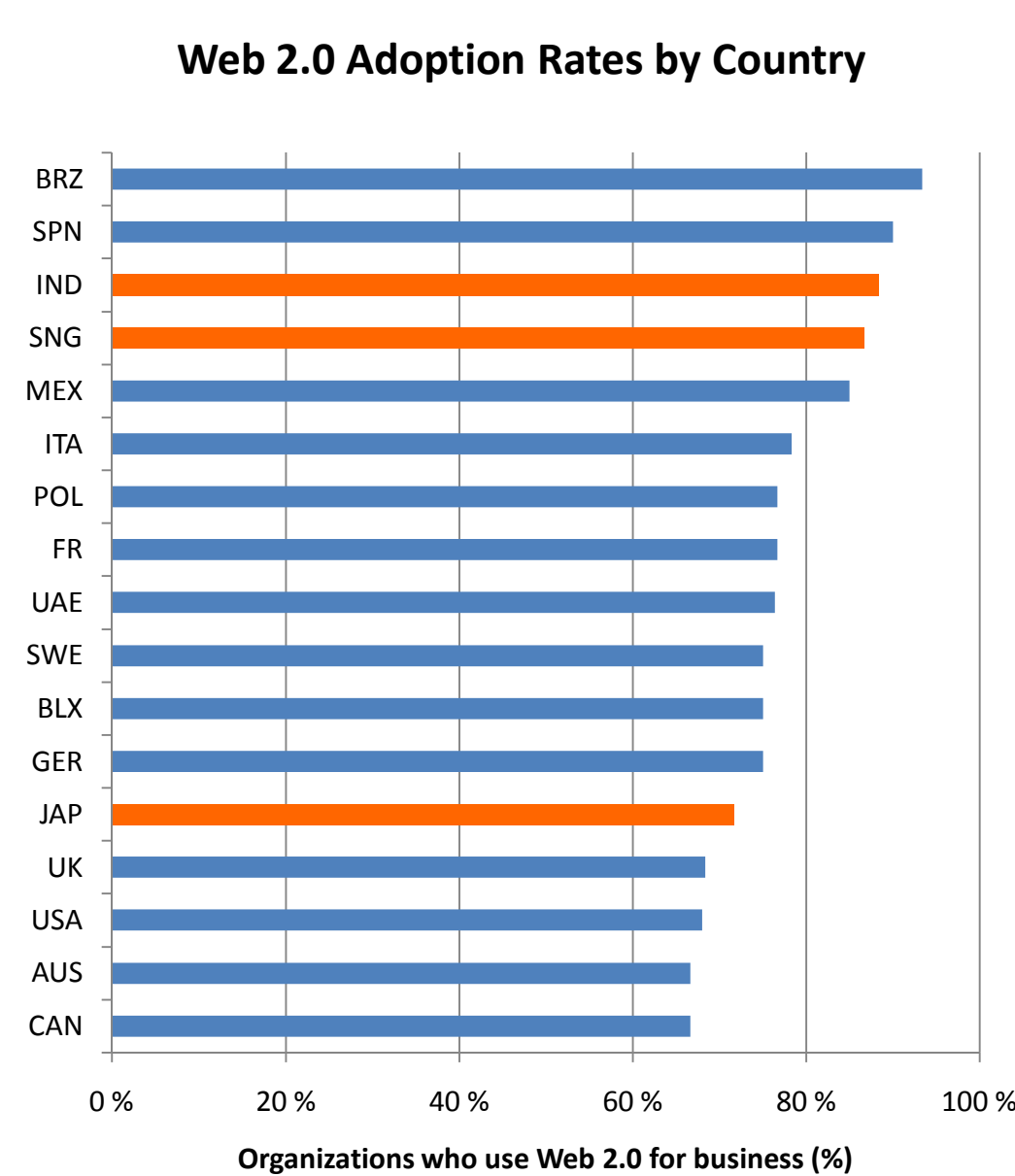
METHODS

Survey balanced by country & size
60/40% private/public sector

Interview (N=27) insiders, analysts, and academics

(In-depth semi-structured)

High Web 2.0 Adoption Rates



Drivers of Web 2.0 Adoption

1. New revenue streams (68%) (esp Brazil, India, UAE, Mexico)
2. Enhance productivity & marketing (40%)
3. Added value in client / customer relations

Web 2.0 Adoption: Uses

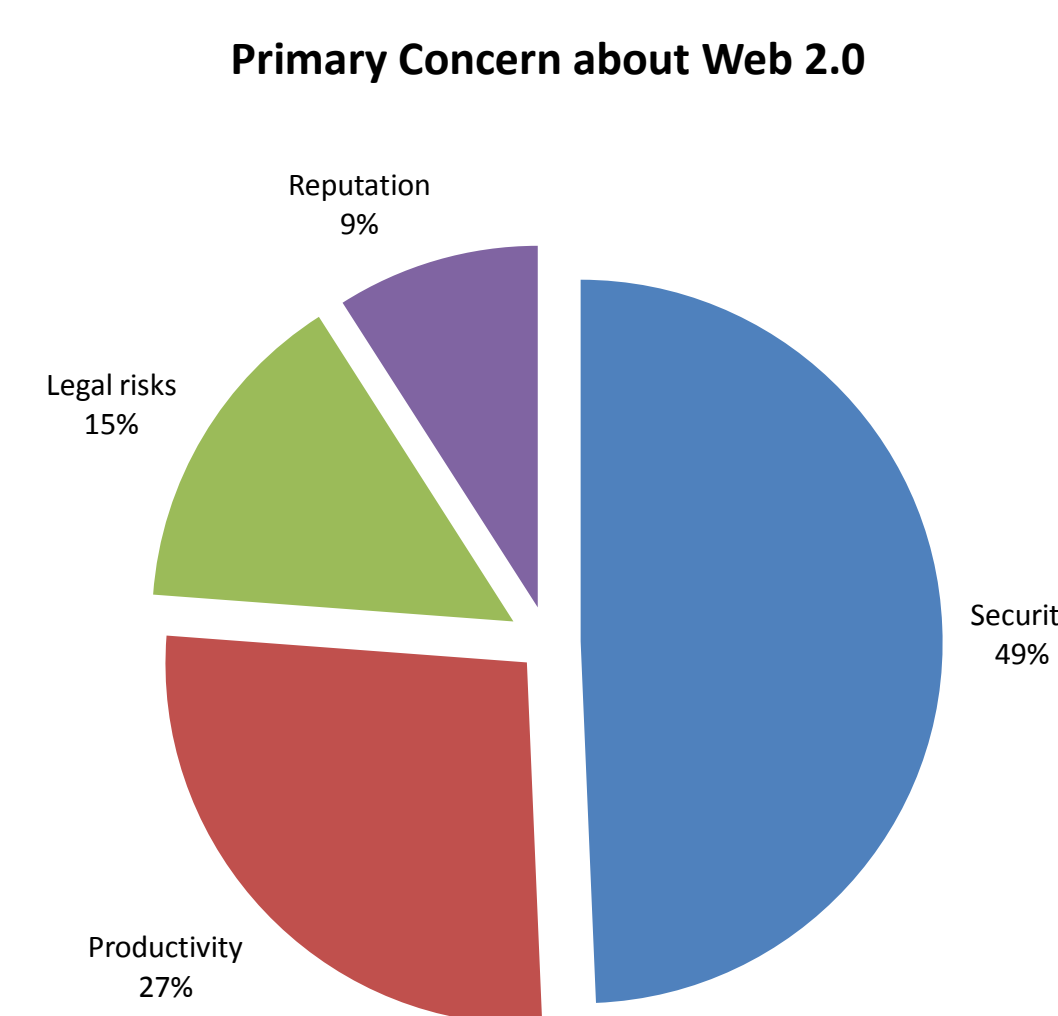
- 51% IT
- 34% Sales/Marketing
- 29% Customer Relations

RESULTS

70% organizations had security incidents in 2009

Average cost of security incidents in 2009 is USD 2 million

Web 2.0 Adoption Concerns



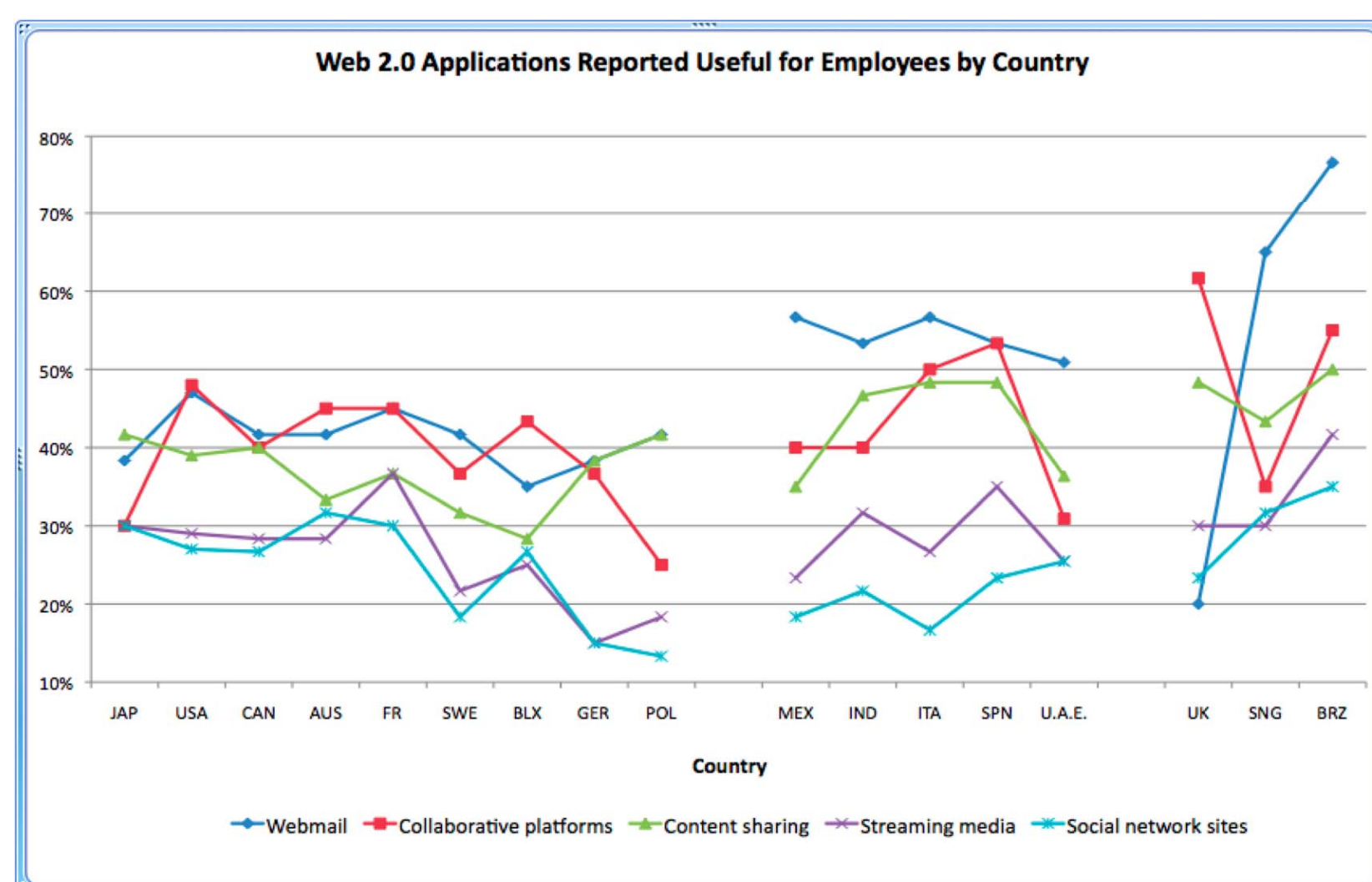
Security Threats: Employee Use of Web 2.0

Malware Introduction	35%
Virus Introduction	15%
Information Overexposure	11%
Spyware Increase	10%
Spam Volume Increase	6%
Exposed Entry Points	6%
Data Leaks	7%
Botnet Introduction	5%
Spam Use Increase	4%

Employee Use of Web 2.0 Tools

- 47% Webmail
- 42% Collaborative platforms
- 40% Content sharing
- 28% Streaming media
- 24% Social network sites

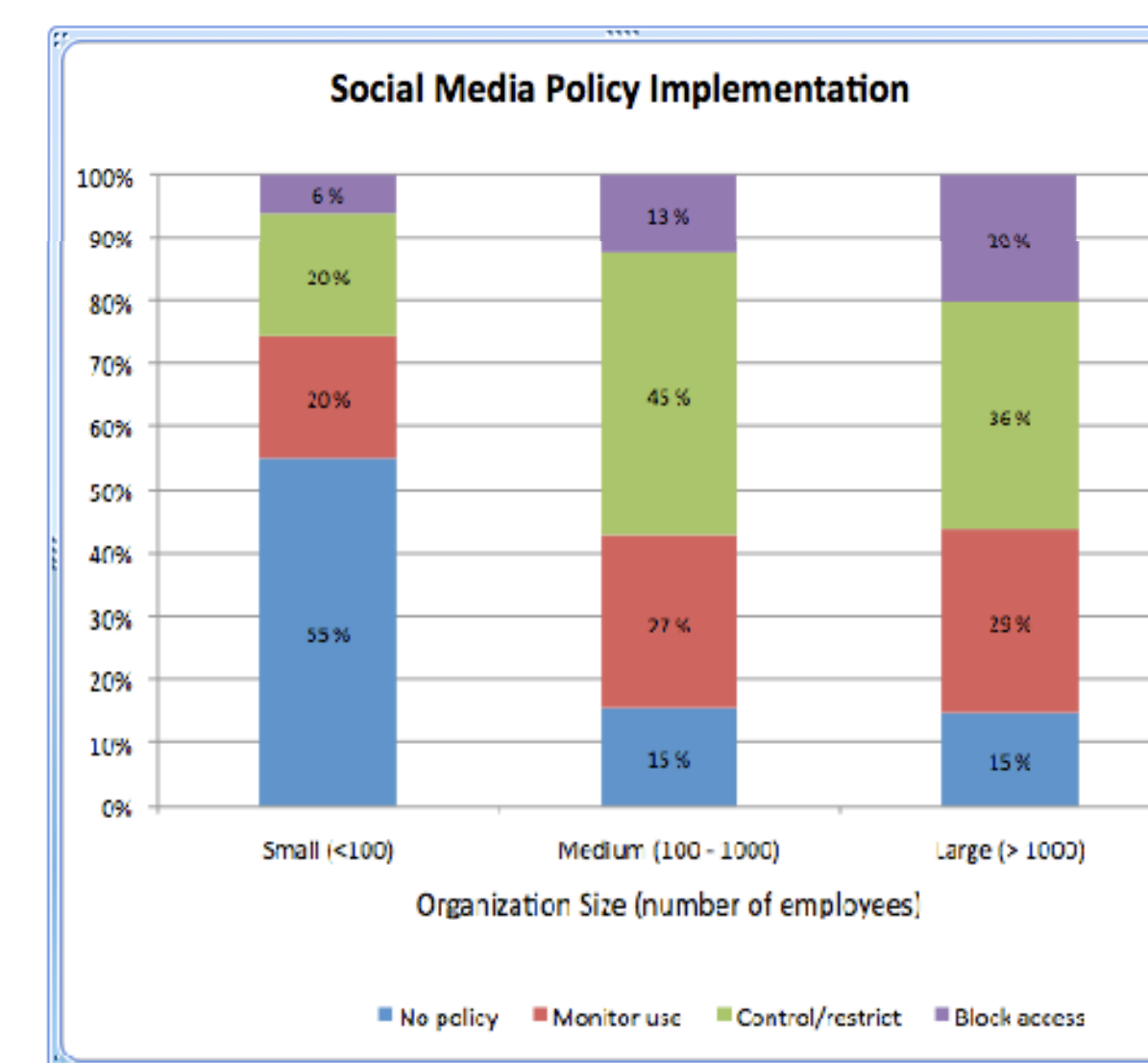
Employees' Value of Web 2.0 Tools



Employee Use of Web 2.0: Security Vulnerabilities

- 51% Social Network Sites
- 44% Webmail
- 24% Content sharing
- 21% Streaming media
- 10% Collaborative platforms

Web 2.0 Policy Implementation



Successful organizational use of Web 2.0 is a complex balancing act that requires assessing challenges and opportunities, mitigating risks, and combining policy, employee education and technology solutions to ensure security.

BALANCING ACT

Multi-layered security approach recommended

Need to balance the value and characteristics of participation, openness, and even playfulness into organizational contexts in a way that protects assets and aligns with organizational goals.