

# Windows Hard Disk Encryption

Usage Analysis

September 2010

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## Usage Analysis

### Introduction

This is the first OPSWAT usage report for hard disk encryption products. Because Microsoft includes BitLocker with six of their operating system configurations, we have taken some unique steps in how we are analyzing this data. These steps are covered in the "Research" section below.

### OPSWAT

Founded in 2002, OPSWAT provides software engineers and IT professionals with development tools and data services to power manageability and security solutions. The company's primary product, OESIS Framework, is a manageability solution licensed by major technology companies like Cisco Systems, Juniper Networks, F5 Networks, Microsoft, HP and many others. Having been adopted as the industry standard software development toolkit (SDK) for creating compliance and manageability applications, the framework's application libraries have now been deployed on over fifty million endpoint systems worldwide. To learn more about OESIS, please visit the product page at <http://www.opswat.com/products/oesis-frameworkae>.

### The Research

Using data collected from a sample of the fifty million endpoints that employ the OESIS Framework, OPSWAT analyzed more than thirty-five thousand reports submitted between July 1 and August 15, 2010.

Microsoft includes BitLocker with the Ultimate and Enterprise versions of Windows Vista and Windows 7, as well as Windows Server 2008 and Windows Server 2008 R2. Because of this we are only counting BitLocker when it is actively encrypting a drive. This manageability feature is part of OPSWAT's OESIS Framework Hard Disk Encryption SDK.

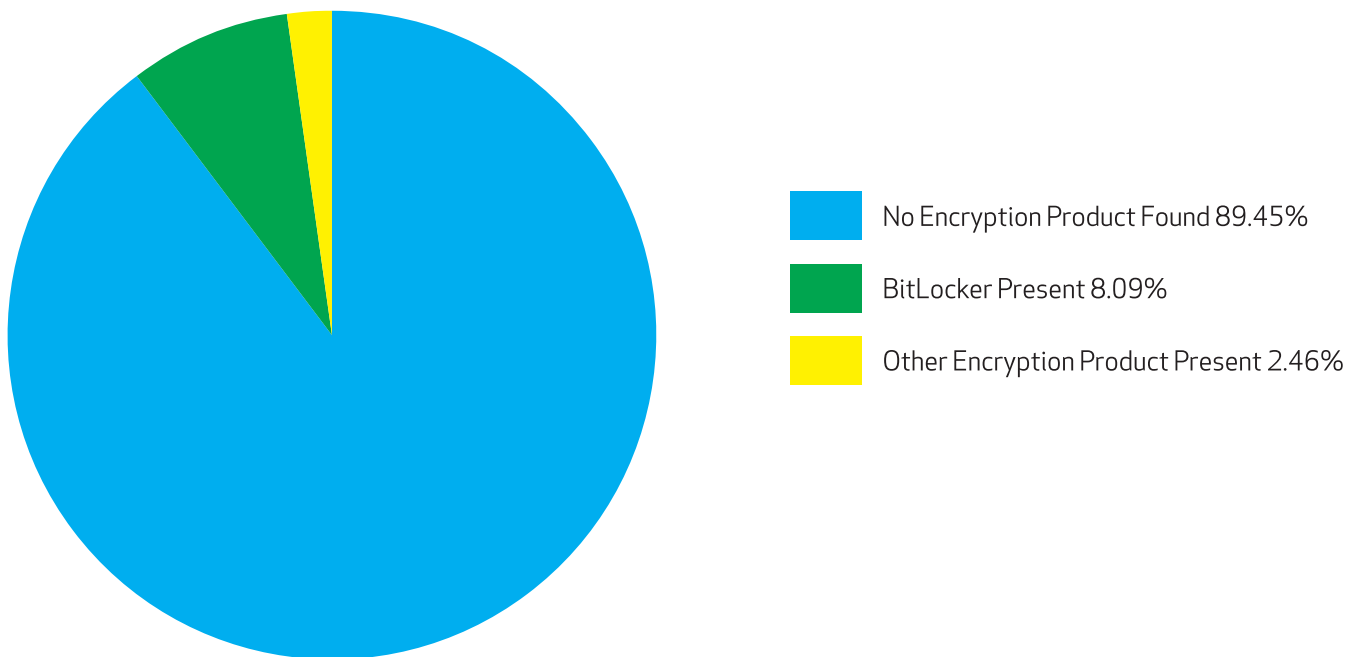
Because application detection relies on the detection capabilities of the OESIS Framework, data is limited to applications that are included in the framework's libraries.

Disk encryption application vendors looking for inclusion in the OESIS Framework are free to partner with OPSWAT through the [OESIS OK Certification Program](#).

To offer security software vendors a way to market their applications and create partnerships with technology companies, OPSWAT created the OESIS OK Certification Program. This program integrates security applications with OESIS and verifies and certifies their interoperability with technology solutions like SSL VPN, network access control and support utilities.

## Adoption of Hard Disk Encryption

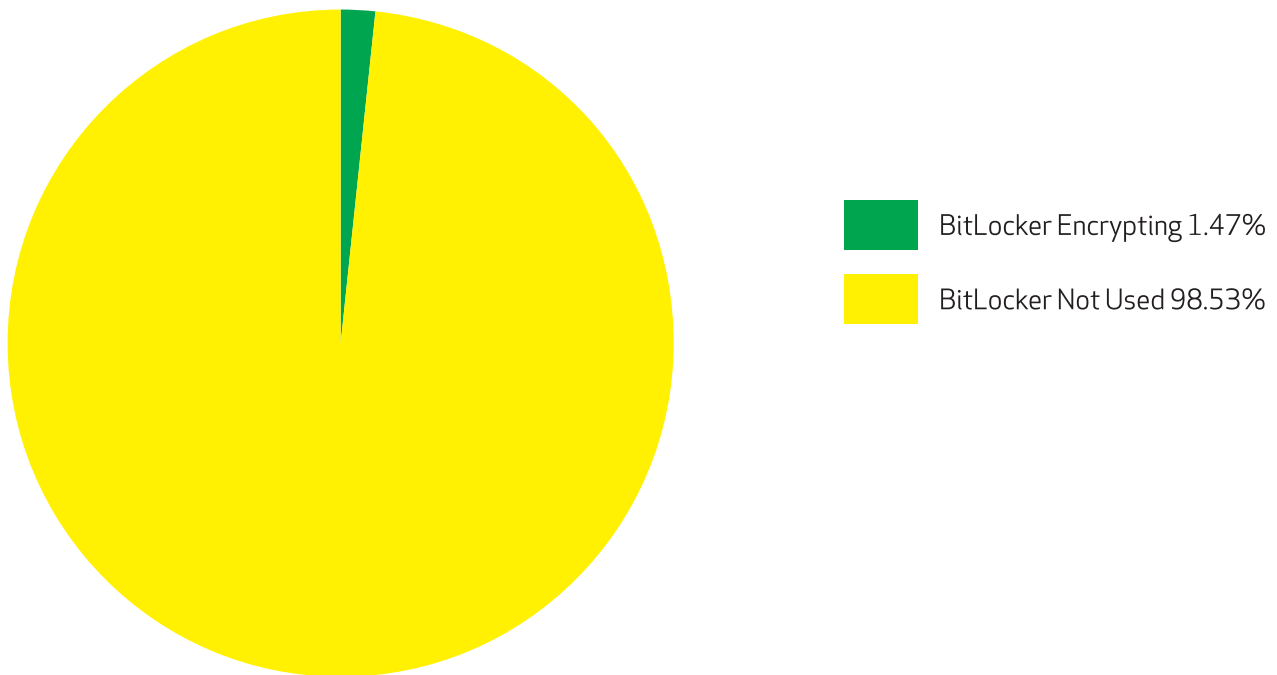
The following graph indicates the number of hard disk encryption applications detected versus the total number of reports received.



## BitLocker Usage

Microsoft has continued to enhance its endpoint security product line. BitLocker, like the disk encryption product category itself, is not finding widespread adoption. The following graph shows that when BitLocker is installed, it is only actively encrypting around 1.5% of those systems.

Preliminary analysis suggests that mobile computer users (laptops, netbooks) have a higher percentage of BitLocker usage than average. We plan to revisit this data in future reports.



## Hard Disk Encryption Vendors

Similar to what we have discovered with our research on antivirus applications, free (and “freemium”) products like TrueCrypt and BitLocker are especially popular and control a large portion of the total market share.

Future reports will contain specific numbers relating to vendor market share ownership. Vendors who wish to be accurately counted are encouraged to contact [marketing@opswat.com](mailto:marketing@opswat.com) to partner with OPSWAT through the OESIS OK Certification Program and ensure that they are fully supported.

The top five hard disk encryption application vendors detected during our survey period include:

**TrueCrypt:** A free, open-source, on-the-fly encryption product initially released in 2004.

**DigitalPersona:** Founded in 1996, DigitalPersona specializes in enterprise protection and authentication solutions. However, until 2010 their publicly available product line included consumer encryption products. DigitalPersona also OEMs their software to computer vendors around the world.

**Sophos/Utlimaco:** Sophos is a well-known antivirus vendor headquartered in the UK and USA. In 2009 they acquired Utlimaco, a provider who specialized in data encryption applications.

**Microsoft:** Beginning with Windows Vista Ultimate and Enterprise, Microsoft began including the BitLocker encryption solution with their operating system distributions.

**Symantec/PGP/GuardianEdge:** The US-based security software giant Symantec established a leadership position in the encryption space by acquiring two important players, PGP and GuardianEdge, in 2010.

## Conclusions

Our findings show that end user adoption of hard disk encryption technologies aren't nearly as widespread as the use of antivirus, antispymware and firewall products.

Even when these hard disk encryption features are included as a feature in the Windows OS, they remain unused for the most part. In future reports we will be tracking the deployment and adoption trends of hard disk encryption to show how these trends may be changing.

Parties interested in hosting this report are free to do so as long as credit is given to OPSWAT, Inc. and a link is provided to [www.oesisok.com](http://www.oesisok.com).

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