

Enterprise Security: Unified Threat Management Vendor Matrix: Excerpt

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Juniper Networks Company Profile

The SRX series services gateways of Juniper Networks Inc, along with the J-series routers and the SSG Secure Services Gateways (SSG), offer multiple security functions such as anti-virus, anti-spam, web filtering, and IDS deep inspection/IPS. While all of these products have high visibility in the large enterprise and carrier markets, the SSG product line has considerable presence among the SMBs as well. Juniper's secure firewall/VPN appliances and routers incorporate UTM features that are delivered in partnership with niche vendors. Juniper's integrated anti-virus solution, comprising anti-spyware, anti-adware, and anti-phishing, is from Kaspersky Lab, with web filtering from Websense and the integrated anti-spam solution from Sophos.

Juniper's Adaptive Threat Management (ATM) solutions offer a highly modular deployment model and risk mitigation capabilities in an open and standards-based environment, features that have found a high level of acceptance among key verticals such as Government, Education, and Healthcare. Though network infrastructure vendors tend to bundle security with infrastructure sales, Juniper also has achieved considerable visibility among non-network customers, who are increasingly evaluating its security solutions independent of their infrastructure buying decisions. (continued page 2)

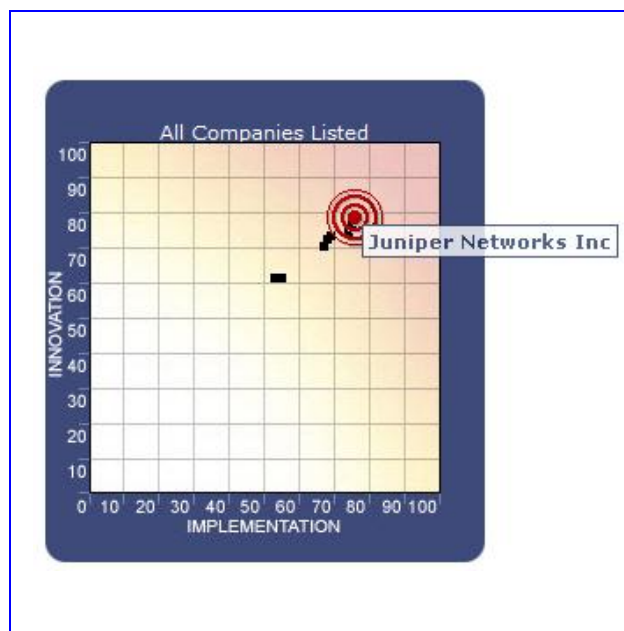
Innovation: 78

Implementation: 76

Juniper Networks places in the 100th percentile of those 9 companies examined.

This company is highest rated company along the Innovation scale.

This company is highest rated company along the Implementation scale.



Section 1. COMPANY PROFILE (CONTINUED FROM PAGE 1)

1.1 IMPLEMENTATION

A key feature of Juniper's ATM solutions is that they support a pay-as-you-grow model, allowing significant flexibility in customer deployments while simultaneously helping them reduce Total Cost of Ownership (TCO). The SSG line of products delivers a rich set of UTM features specifically designed for branch office security. A simple built-in feature allows easy update of firmware and the latest signatures, facilitating easy management. The products ensure granular control over zones, policies, objects, users, groups, protocols, services, source and destination IP addresses with advanced screening, profile, and filtering options that help to protect both the endpoints and the networks.

Juniper scores well on Implementation, especially for the following parameters:

- Product Integration and Support
 - The UTM products integrate a complete suite of security features that include a stateful firewall, IPS, application security, anti-virus, anti-spam, anti-phishing, anti-adware, and anti-spyware. Centralized management software simplifies deployment and updates.
 - Quick deployment features of Auto Connect VPN and Dynamic VPN help administrators overcome the bottlenecks associated with IPsec implementations.
 - Seamless integration of IPS functionality across all products with in-depth analysis of application protocol, context, state, and behavior help mitigate zero-day attacks.
- Total Solutions Quotient
 - Approach to total solutions enablement through partner ecosystem development, and alliances with key vendors: Juniper has extensive relationships with multiple partners and solutions vendors for both channel and technology capabilities. Juniper has a longstanding relationship with Symantec for developing and delivering best-in-class UTM solutions that are standards-based. Juniper's J-Security Team and Symantec's Global Intelligence Network collaborate to deliver security and threat research to their customers.
 - Juniper also provides integrated file-based anti-virus remediation from Kaspersky Lab on the Juniper Networks SSG series and the SRX series Services Gateways for branches.
- Market Leadership, Strength, and Experience
 - Level of penetration/share in key vertical and application markets: Juniper has seen consistent high growth in its UTM revenues largely due to exceptional performance, and mature products that have helped the vendor emerge as a value differentiator in a highly competitive market which is displaying a fair degree of price sensitivity.
 - Juniper also has been winning a substantial number of deals in environments running non-Juniper network gear, indicative of the unique mindshare it commands for its security portfolio.

1.2

INNOVATION

Juniper has consistently nurtured innovation across its security products portfolio through in-house product development as well as through strategic acquisitions. The latest addition to the SSG product line, the SRX1400 gateway, is scalable to suit a variety of environments, from a small business to a carrier data center. Juniper scores well on the Innovation axis along the following parameters:

- Industry Leadership, Influence Factor, and Knowledge Transfer
 - Juniper's core network infrastructure and security solutions are behind the most demanding networks in the world, including the New York Stock Exchange and Facebook.
 - Through a number of industry partnerships, Juniper is promoting innovation, interoperability, and open standards.
 - Junos OS, a single operating system that runs across the switching, routing, and security solutions, has been key in streamlining network operations and lower TCO for enterprises as well as service providers. The Junos One family of processors has been consistently raising the bar on network performance, setting new industry standards.
 - Juniper has also announced interoperability of its IP networking solutions with Lync, the Microsoft UC platform, ensuring optimal performance of the UC solution in Juniper network environments.
- New Application Enablement
 - Juniper has developed a number of new application areas, including Junos Pulse, an integrated network client that enables network security, access, and application acceleration for both mobile and non-mobile devices. This, coupled with the acquisition of SMobile Systems, a mobile security applications provider, has helped Juniper to offer a more unified solution for mobile endpoints.
 - Juniper's entry into the mobile device security market addresses the growing need for device security among enterprise end users. Junos Pulse will also help wireless carriers offer a set of mobile security solutions and result in higher value-add to their revenue streams.

Section 2. RANKINGS

Rank	Company	Innovation	Implementation
1	Juniper Networks Inc.	78	76
2	Fortinet	76	75
3	Cicso Systems Inc.	74	74
4	Check Point Software Technologies Inc.	73	69
5	SonicWALL, Inc.	72	68
6	WatchGuard Technologies	70	67
7	McAfee Inc	70	67
8	Cyberoam	61	55
9	NetASQ	61	53

(Source: ABI Research)

Section 3. METHODOLOGY

3.1 Introduction

The rapid growth in the Unified Threat Management (UTM) appliances market is driven by the need for enterprises to consolidate their network security infrastructure, realize cost savings and achieve better operational and management efficiencies. UTM devices are those that offer a set of security features built around a hardened (out-of-the box) Operating System (OS). Many of these devices combine security and policy management features, along with quality of service and load-balancing attributes. Adoption of UTM devices is on the rise as security threats diversify in nature and companies are forced to deploy multiple countermeasures. UTM devices that comprise diverse security applications such as anti-virus, firewalls, intrusion detection, and spam filters coupled with management features have driven adoption among both large enterprises and small and medium businesses (SMB). UTM device vendors have introduced a number of common differentiators that focus on:

- Form factor.
- Ease and simplicity of installation.
- Advanced predictive functionality that anticipates emerging market needs. Many of these devices have features for network security (firewalls, IDS/IPS, VPN), web security (anti-virus, URL filters) and e-mail security (spam filter, anti-virus and IM controls, and security).
- Local storage.
- Modularity, allowing users to turn on specific features and multiple throughput options with varying price points.
- Attractive bundled pricing.

However, some vendors are known to brand their advanced firewall systems as UTM devices though these may differ significantly from what is outlined above. UTM devices have evolved over time and some vendors are increasingly incorporating identity management, Voice over IP (VoIP), and Unified Communications (UC) security, and Network Access Control (NAC) functions, especially for branch office deployments. VoIP and UC applications present unique challenges as security features designed for these applications should be designed in such a way that they do not inject packet loss and jitter in the network, which may adversely impact the delivery of real-time media. There is a confusing array of pricing in the market today and this is largely due to the expanding functionality of these devices. Customers demand network IPS sensors with wireline speed performance since inline security controls can negatively affect network performance.

3.1.1 UTM Market Growth

In 2010, the UTM market saw a 10.6% growth in revenue, largely due to the fact that the increasing number of threats to enterprise networks makes it impossible to deploy a dedicated device to address each one of them. The UTM concept resonated well in the SMB market in its early days, as these businesses did not have the resources to manage security infrastructure sprawl. Though large enterprises with best-of-breed equipment did not see any value in deploying UTM devices at first, this is changing as vendors have added advanced firewall and IPS functionality to these devices. Given that UTMs, with their lower pricing and modular design, can significantly reduce

CAPEX, they are being deployed as dedicated appliances (for a single functionality) by large enterprises.

UTM products have had a long gestation period and need some unique skills in their design and implementation. Symantec, which was one of the first security vendors to introduce a UTM-type product, ended support for its UTM appliances in 2006 and transferred the customer base to Juniper.

Enterprises predominantly opt for best-of-breed technologies when implementing security. This not only escalates cost but also creates management challenges with multiple devices and solution sets at headquarters and branches. For enterprise deployments, vendors tend to stress Total Cost of Ownership (TCO) benefits. However, unified management is fast emerging as a critical influence. A single management system that can deliver information across multiple UTM devices coupled with a high degree of intuitiveness and full life-cycle management functions that range from configuration to monitoring and troubleshooting, is considered invaluable in the enterprise scenario.

For example, the Cisco Adaptive Security Appliance, the ASA 5500 series IPS Editions, offers a Cisco management and monitoring suite that facilitates large-scale deployment and operation. The Cisco Adaptive Security Device Manager (ASDM) provides browser-based management and monitoring interfaces for individual devices. The Fortinet FortiManager and FortiAnalyzer appliances offer a centralized management solution for enterprises, regardless of the number of branch offices or remote locations they may have.

3.2 DESCRIPTION OF CRITERIA

Criteria used to develop this UTM Vendor Matrix are related to product and company characteristics that serve as proxies for vendor performance in the areas of Innovation and Implementation. Numerical scores are aggregated, weighted, and analyzed to provide overall rankings that are assigned to each vendor on the Innovation and Implementation axes.

3.3 Innovation

The eight Innovation scoring criteria and their associated weightings are:

1. Scope of the UTM offering (10% weight)
 - Evaluates the breadth of UTM solution offerings and capabilities (narrow, partial, or complete)
 - Evaluates breadth of application support (broad or limited)
2. Product Innovation I – Offering (25% weight)
 - Evaluates degree of specialization (narrow or broad)
 - Evaluates product considerations (number of security features, bundling)
 - Evaluates UTM architectures, performance features such as throughput, performance resilience (when multiple features are turned on), and scalability
 - Availability of load-balancing features to accommodate the processor needs of different security applications

- Availability of applications for managing enterprise-wide UTM deployments, and ability of the management software to work across third-party solutions as well
 - Additional consideration for awards/recognition for product excellence
 - Slow product launches or upgrades and inadequate QoS considerations have negative impact on ratings
3. Product Innovation II – Partner and VAR Enablement (15% weight)
- Evaluates ability to offer a complete suite of solutions that addresses many of the network and content security needs of enterprises
 - Evaluates ability to allow third-party solution integration with the core UTM platform
4. Scalability and Flexibility (10% weight)
- Evaluates level of robustness and the ability of the product to scale
 - Evaluates demonstrating flexibility, extendibility, and ability to scale in real-world environments (proof points/use cases are critical considerations)
 - Additional consideration for strong vendor core competencies and skill sets
5. Application and Vertical Market Leadership, Alignment, and Innovation (20% weight)
- Evaluates leadership within verticals and applications; depth and breadth of application focus and specialization; and innovation across multiple products and vertical markets (weak, moderate, or strong)
6. Overall Vendor Strategy, Vision, and Approach (5% weight)
- Evaluates strategies for the deployment of UTM devices comprising multiple, key security features
 - Additional consideration for clear vision and strength of management team
 - Additional consideration for clear vision and product alignment with market needs
 - Additional consideration for synergy between expressed vision and offered products
7. Industry Leadership, Influence Factor, and Knowledge Transfer (10% weight)
- Evaluates involvement in leading trials and deployments
 - Evaluates involvement in industry groups/associations (both security and end-user)
 - Evaluates participation in UTM education and awareness campaigns
 - Evaluates length of time in the UTM and network security space
 - Evaluates perceived level of influence in the space

8. New Application Enablement (5% weight)

- Evaluates focus on developing/enabling new application areas
- Evaluates capabilities to enable turnkey solutions for new applications
- Evaluates development tools/programs available to partners to enable new applications

3.4 Implementation

The nine Implementation scoring criteria and their associated weightings are:

1. Breadth and Strength of Vertical Markets Served/Targeted (10% weight)

- Evaluates vendor specialization within vertical markets as well as number of vertical markets served/targeted
- Evaluates strength/leadership position within those verticals
- Additional consideration for alliances with key vertically aligned industry associations, regulatory bodies, and so forth.

2. Breadth and Strength of Solutions in the Markets Served/Targeted (10% weight)

- Evaluates vendor specialization within specific application markets as well as number of applications served/targeted
- Evaluates strength/leadership position within those applications
- Additional consideration for strong ability to shift seamlessly vertically or horizontally targeted product offerings
- Additional consideration for alliances with key industry associations, regulatory bodies, and so on.

3. Product Integration and Support Capabilities (25% weight)

- Evaluates service integration capabilities and ability to support customers (weak, moderate, or strong)

4. Installed Base/Customer Deployments (25% weight)

- Evaluates strength of customer base and customer mix
- Evaluates types of deployments
- Evaluates typical size of deployments
- Evaluates visibility in deals/end-user proposals

5. Geographic Presence and Penetration (5% weight)

- Evaluates vendor presence and penetration in key regional markets, local support, and partner ecosystem (weak, moderate, or strong)

6. Total Solutions Quotient (5% weight)
 - Evaluates approach to total solutions enablement through partner ecosystem development, and alliances with key security vendors
 - Number of subscription services offered
 - Additional consideration for providing customer support, security information, and event management through management software and dashboards
7. Partner Collaboration Quotient (5% weight)
 - Evaluates overall partnering strategy and approach, including partner “friendliness” (approachability and receptivity)
 - Evaluates overall diversity of channels
 - Evaluates partner collaboration efforts such as cross-marketing and bringing partners into deals
 - Additional consideration for partner/potential partner opinions shared with ABI Research
8. Partner Ecosystem — Vendors, VARs, Integrators, Managed Security Service Providers (MSSP) (5% weight)
 - Evaluates breadth and strength of vendor, VAR, integrator and MSSP partner network
 - Evaluates depth and strength of those relationships — considerations include vertical/horizontal and application specialization and synergy among partners
 - Additional consideration for cross-marketing and messaging efforts
9. Overall Perceived Market Leadership, Strength, and Experience (5% weight)
 - Evaluates level of market penetration and leadership through subjective and objective considerations such as:
 1. Perceived level of penetration/share in key vertical/horizontal and application markets
 2. Product support (professional and consulting services, break-fix and maintenance)
 3. Perceived position in market relative to competition
 4. Revenue growth (historical and forecast)
 5. Financial strength, health, and backing
 6. Company size
 7. Positive word-of-mouth/momentum in industry

3.5 Scoring

Vendors receive a rating score for each ABI Research-defined criterion under Implementation and Innovation. These scores range from 0 to 9 and are based on available information as well as ABI Research assumptions. Points are awarded in 0.25 increments. For example, a score of 8.75 is possible within a given criterion.

Each criterion (and its score) is weighted based on ABI Research's opinion of each criterion's level of influence on and importance to the overall assessment of Innovation and Implementation. The number of criteria for Implementation and Innovation may vary; however, this does not impact service provider ranking. Vendors receiving higher scores in higher weighted criteria will benefit in terms of better overall position. Lower scores in higher weighted categories will result in weaker overall placement due to the impact of the weighting.

The rating scores assigned to each criterion are added to determine a raw total score for Implementation and Innovation. A mathematical formula is then applied to adjust for the 0 to 9 rating system and the number of criteria so that vendors can be positioned along the x- and y-axes (with a maximum score of 100 for Implementation and Innovation). The mathematical formula does not impact vendor ranking.

It is ABI Research's policy not to publicly disclose individual scores for each criterion for each vendor. However, we will accept requests to discuss a vendor's individual scores with that same provider.

3.6 Rankings

After individual scores are established for Innovation and Implementation using the above criteria, an overall company score is established using the Root Mean Square (RMS) method:

$$\text{Score} = \sqrt{\frac{\text{innovation}^2 + \text{implementation}^2}{2}}$$

The resulting overall scores are then ranked and used for percentile comparisons.

The RMS method, in comparison with a straight summation or average of individual innovation and implementation values, rewards companies for standout performance.

For example, using this method a company with an innovation score of 9 and an implementation score of 1 would score considerably higher than a company with a score of 5 in both areas, despite the mean score being the same. ABI Research believes this is appropriate as the goal of these matrices is to highlight those companies that stand out from the others.

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