Vendor Landscape: Next Generation Firewall

Continued consolidation of capabilities means high performing products.
Network security is still a high priority for organizations; the right perimeter means more threats stay outside and sensitive data remains inside.

This Research Is Designed For:

✓ Enterprises seeking to select a solution for Next Generation Firewall (NGFW).
✓ Their NGFW use case may include:
  • Enterprises looking for a network perimeter security appliance for comprehensive protection of the network edge.
  • Enterprises that have established their network perimeter NGFW strategy independently and need guidance in evaluating available products.

This Research Will Help You:

✓ Understand what’s new in the NGFW market.
✓ Evaluate NGFW vendors and products for your enterprise needs.
✓ Determine which products are most appropriate for particular use cases and scenarios.
Executive summary

Info-Tech evaluated ten competitors in the NGFW market, including the following notable performers:

**Champions:**
- **Dell (SonicWALL)** has the full package – great features and price.
- **Fortinet**: a consistent leader in the firewall space.
- **WatchGuard**: a strong product for organizations with a strict budget.
- **Sophos**: one of the only products evaluated with a full feature set.

**Value Award:**
- **WatchGuard** has a highly competitive price for organizations looking for a comprehensive product without spending the dollars.

**Trend Setter Award:**
- **WatchGuard**: the product’s reporting functions were a differentiator amongst other NGFWs.

---

**Info-Tech Insight**

1. **Protect outbound data as well as inbound.**
   
   Built-in Data Leakage Protection (DLP) capabilities ensures that sensitive or confidential data is protected.

2. **The more traffic your firewall can see, the better it can protect it.**
   
   Encrypted traffic can conceal threats from firewalls, while Wi-Fi networks provide a route for attacks to bypass firewalls. Today’s firewall solutions focus on controlling these types of traffic.

3. **Capabilities should not cut down on performance.**
   
   Despite the breadth of features, NGFW should not have a significant impact to your overall network performance, even if you have the capabilities fully “switched on.”
Market overview

**How it got here**

- Firewalls originated theoretically in the late 1980s before being brought to fruition as traffic-controlling tools.

- Firewalls have evolved *four* times over from simple packet filters (that evaluated source, destination, and protocol) to stateful inspectors (with the capability of “remembering” the nature of ongoing communications and origin of the packets involved), proxies (evaluated packet contents, rather than just the packets), to Unified Threat Management systems (UTMs) or Next Generation Firewalls (NGFWs).

- The last iteration – originating as the term UTM – began integrating capabilities such as anti-malware and intrusion prevention for a more robust firewall.

- While there is still debate over the semantics, UTMs are now frequently referred to as Next Generation Firewalls.

**Where it’s going**

- NGFWs reflect a movement towards more content-aware security, combining additional capabilities on top of anti-malware and intrusion prevention, such as:
  - Data Leakage Protection (DLP)
  - Network Access Control (NAC)
  - Application control
  - User identity-related control

  A growing number of vendors are also adding web application firewalling functionality.

- As more organizations seek out consolidated solutions for economical savings and resource management, NGFW will be replacing most standalone security solutions like DLP. Some vendors have already started phasing out standalones this year.

---

**Info-Tech Insight**

As the market evolves, capabilities that were once cutting edge become default and new functionality becomes differentiating. Intrusion prevention has become a Table Stakes capability and should no longer be used to differentiate solutions. Instead focus on DLP and web application control to get the best fit for your requirements.
NGFW vendor selection / knock-out criteria: market share, mind share, and platform coverage

- While there is some debate over semantics regarding UTM vs. NGFW, the market remains stable, represented by long-time, experienced vendors and newer, but just as strong, competitors.
- For this Vendor Landscape, Info-Tech focused on those vendors that offer broad capabilities across multiple platforms and that have a strong market presence and/or reputational presence among mid and large-sized enterprises.

Included in this Vendor Landscape:

- **Barracuda.** Highly competitive solution in terms of features and the space’s best kept secret.
- **Check Point.** One of the progenitors of the firewall space and still one of the most recognizable names.
- **Cisco.** The ASA firewall line remains one of the strongest solutions, coupled with Cisco’s networking market share.
- **Dell (SonicWALL).** After being acquired by Dell in 2012, it has emerged as one of the stronger solutions features-wise.
- **Fortinet.** The vendor that coined the UTM term and one of the first to incorporate enhanced capabilities.
- **Juniper.** Entered the firewall market through acquisition of NetScreen and has established a solid foothold since then.
- **McAfee.** NGFW is another piece to the security giant’s already broad portfolio of products.
- **Palo Alto.** The most recent entrant to the market of the reviewed solutions, but still offering a competitive solution.
- **Sophos.** Acquired Cyberoam in 2014 to bolster its NGFW portfolio.
- **WatchGuard.** Another vendor growing into larger markets after an early focus in the SMB space.
### NGFW criteria & weighting factors

#### Product Evaluation Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Features</td>
<td>The solution provides basic and advanced feature/functionality.</td>
</tr>
<tr>
<td>Usability</td>
<td>The end-user and administrative interfaces are intuitive and offer streamlined workflow.</td>
</tr>
<tr>
<td>Affordability</td>
<td>Implementing and operating the solution is affordable given the technology.</td>
</tr>
<tr>
<td>Architecture</td>
<td>Multiple deployment options and extensive integration capabilities are available.</td>
</tr>
</tbody>
</table>

#### Vendor Evaluation Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viability</td>
<td>Vendor is profitable, knowledgeable, and will be around for the long term.</td>
</tr>
<tr>
<td>Strategy</td>
<td>Vendor is committed to the space and has a future product and portfolio roadmap.</td>
</tr>
<tr>
<td>Reach</td>
<td>Vendor offers global coverage and is able to sell and provide post-sales support.</td>
</tr>
<tr>
<td>Channel</td>
<td>Vendor channel strategy is appropriate and the channels themselves are strong.</td>
</tr>
</tbody>
</table>

#### Criteria Weighting

- **Features**: 30%
- **Usability**: 30%
- **Architecture**: 20%
- **Affordability**: 20%

#### Vendor Evaluation Criteria

- **Viability**: 50%
- **Strategy**: 25%
- **Reach**: 15%
- **Channel**: 30%
The Info-Tech NGFW Vendor Landscape

The zones of the Landscape

**Champions** receive high scores for most evaluation criteria and offer excellent value. They have a strong market presence and are usually the trend setters for the industry.

**Market Pillars** are established players with very strong vendor credentials, but with more average product scores.

**Innovators** have demonstrated innovative product strengths that act as their competitive advantage in appealing to niche segments of the market.

**Emerging Players** are comparatively newer vendors who are starting to gain a foothold in the marketplace. They balance product and vendor attributes, though score lower relative to market Champions.

For an explanation of how the Info-Tech Vendor Landscape is created, see Information Presentation – Vendor Landscape in the Appendix.
Balance individual strengths to find the best fit for your enterprise

<table>
<thead>
<tr>
<th>Product</th>
<th>Overall</th>
<th>Features</th>
<th>Usability</th>
<th>Afford.</th>
<th>Arch.</th>
<th>Overall</th>
<th>Viability</th>
<th>Strategy</th>
<th>Reach</th>
<th>Channel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barracuda</td>
<td><img src="exemplary_icon" alt="Exemplary" /></td>
<td><img src="good_icon" alt="Good" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="exemplary_icon" alt="Exemplary" /></td>
<td><img src="good_icon" alt="Good" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
</tr>
<tr>
<td>Check Point*</td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
</tr>
<tr>
<td>Cisco</td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
</tr>
<tr>
<td>Fortinet</td>
<td><img src="exemplary_icon" alt="Exemplary" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="exemplary_icon" alt="Exemplary" /></td>
<td><img src="good_icon" alt="Good" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
</tr>
<tr>
<td>Juniper*</td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
</tr>
<tr>
<td>Intel (McAfee)*</td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
</tr>
<tr>
<td>Palo Alto*</td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="inadequate_icon" alt="Inadequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
</tr>
<tr>
<td>Dell (SonicWALL)</td>
<td><img src="exemplary_icon" alt="Exemplary" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="exemplary_icon" alt="Exemplary" /></td>
<td><img src="good_icon" alt="Good" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
</tr>
<tr>
<td>Sophos</td>
<td><img src="exemplary_icon" alt="Exemplary" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="exemplary_icon" alt="Exemplary" /></td>
<td><img src="good_icon" alt="Good" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
</tr>
<tr>
<td>Watchguard</td>
<td><img src="exemplary_icon" alt="Exemplary" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="exemplary_icon" alt="Exemplary" /></td>
<td><img src="good_icon" alt="Good" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
<td><img src="adequate_icon" alt="Adequate" /></td>
</tr>
</tbody>
</table>

Legend:  
- ![Exemplary](exemplary_icon) = Exemplary  
- ![Good](good_icon) = Good  
- ![Adequate](adequate_icon) = Adequate  
- ![Inadequate](inadequate_icon) = Inadequate  
- ![Poor](poor_icon) = Poor

*The vendor declined to provide pricing and publicly available pricing could not be found.

For an explanation of how the Info-Tech Harvey Balls are calculated, see Information Presentation – Criteria Scores (Harvey Balls) in the Appendix.
The Info-Tech NGFW Value Index

What is a Value Score?
The Value Score indexes each vendor’s product offering and business strength relative to its price point. It does not indicate vendor ranking.

Vendors that score high offer more bang-for-the-buck (e.g. features, usability, stability, etc.) than the average vendor, while the inverse is true for those that score lower.

Price-conscious enterprises may wish to give the Value Score more consideration than those who are more focused on specific vendor/product attributes.

On a relative basis, WatchGuard maintained the highest Info-Tech Value Score™ of the vendor group. Vendors were indexed against WatchGuard’s performance to provide a complete, relative view of their product offerings.

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Value Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>WatchGuard</td>
<td>100</td>
</tr>
<tr>
<td>Barracuda</td>
<td>92</td>
</tr>
<tr>
<td>Dell (SonicWALL)</td>
<td>85</td>
</tr>
<tr>
<td>Fortinet</td>
<td>42</td>
</tr>
<tr>
<td>Juniper</td>
<td>26</td>
</tr>
<tr>
<td>Sophos</td>
<td>11</td>
</tr>
<tr>
<td>Cisco</td>
<td>10</td>
</tr>
<tr>
<td>Check Point</td>
<td></td>
</tr>
<tr>
<td>McAfee</td>
<td></td>
</tr>
<tr>
<td>Palo Alto</td>
<td></td>
</tr>
</tbody>
</table>

Average Score: 52

*The vendor declined to provide pricing and publicly available pricing could not be found.

For an explanation of how Price is determined, see Information Presentation – Price Evaluation in the Appendix.

For an explanation of how the Info-Tech Value Index is calculated, see Information Presentation – Value Index in the Appendix.
Table Stakes represent the minimum standard; without these, a product doesn’t even get reviewed

<table>
<thead>
<tr>
<th>Feature</th>
<th>What it is:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Firewall</td>
<td>The solution includes a stateful inspection.</td>
</tr>
<tr>
<td>VPN</td>
<td>Offers IPSEC (for site-to-site tunnels) and SSL VPN (for remote access) options.</td>
</tr>
<tr>
<td>Anti-Malware</td>
<td>Built-in perimeter anti-virus and anti-spyware protection.</td>
</tr>
<tr>
<td>Intrusion Prevention</td>
<td>Ability to recognize and restrict inappropriate and unauthorized access.</td>
</tr>
</tbody>
</table>

**What does this mean?**

The products assessed in this Vendor Landscape™ meet, at the very least, the requirements outlined as Table Stakes.

Many of the vendors go above and beyond the outlined Table Stakes, some even do so in multiple categories. This section aims to highlight the products’ capabilities in excess of the criteria listed here.

If Table Stakes are all you need from your NGFW solution, the only true differentiator for the organization is price. Otherwise, dig deeper to find the best price to value for your needs.
Advanced Features are the capabilities that allow for granular market differentiation

### Scoring Methodology

Info-Tech scored each vendor’s features offering as a summation of its individual scores across the listed advanced features. Vendors were given one point for each feature the product inherently provided. Some categories were scored on a more granular scale with vendors receiving half points.

### Advanced Features

<table>
<thead>
<tr>
<th>Feature</th>
<th>What we looked for:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identity-Based Control</td>
<td>Mapping of specific security policies to defined user groups and individuals.</td>
</tr>
<tr>
<td>Data Leakage Protection</td>
<td>Restriction on the egress of sensitive privileged or confidential data.</td>
</tr>
<tr>
<td>Network Access Control</td>
<td>Endpoint integration to ensure each connecting device has appropriate security.</td>
</tr>
<tr>
<td>URL Filtering</td>
<td>Restrictive filtering of web surfing to limit exposure to harmful and inappropriate sites.</td>
</tr>
<tr>
<td>Application Control</td>
<td>Ability to restrict, on a granular level, which web apps are allowed to run.</td>
</tr>
<tr>
<td>Wi-Fi Network Control</td>
<td>Ensuring Wi-Fi networks have the same security stance and abilities as the perimeter.</td>
</tr>
<tr>
<td>WAN Routing &amp; Optimization</td>
<td>Dynamic routing of WAN traffic backed by QoS and prioritization capabilities.</td>
</tr>
<tr>
<td>Encrypted Data Control</td>
<td>Native decryption and re-encryption of SSL and SFTP traffic for thorough inspection.</td>
</tr>
<tr>
<td>Web App Firewalling</td>
<td>Ability to protect web servers against attacks like SQL injections.</td>
</tr>
</tbody>
</table>

For an explanation of how Advanced Features are determined, see Information Presentation – Feature Ranks (Stoplights) in the Appendix.
Each vendor offers a different feature set; concentrate on what your organization needs

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Identity</th>
<th>DLP</th>
<th>WCF</th>
<th>App Control</th>
<th>App FW</th>
<th>NAC</th>
<th>Wi-Fi</th>
<th>WAN</th>
<th>Encryption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barracuda</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Point</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cisco</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fortinet</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Juniper</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>McAfee</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Palo Alto</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dell (SonicWALL)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sophos</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WatchGuard</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Legend: 
- =Feature fully present
- =Feature partially present/pending
- =Feature absent

For an explanation of how Advanced Features are determined, see Information Presentation – Feature Ranks (Stoplights) in the Appendix.
Beyond traffic, data also deserves protection and NGFW have incorporated such capabilities

Solutions with either DLP, web application control, and encryption, or just web application control and encryption, will inspect and control your data.

**1. Enhanced inbound traffic protection**

---

**Why Scenarios?**

In reviewing the products included in each Vendor Landscape™, certain use cases come to the forefront. Whether those use cases are defined by applicability in certain locations, relevance for certain industries, or as strengths in delivering a specific capability, Info-Tech recognizes those use cases as Scenarios, and calls attention to them where they exist.

For an explanation of how Scenarios are determined, see Information Presentation – Scenarios in the Appendix.
Dell (SonicWALL) is one of the best all-around solutions, along with being one of the most affordable.

**Champion**

- **Product:** SuperMassive Series, NSA Series, TZ Series
- **Employees:** 100,000
- **Headquarters:** Round Rock, TX
- **Website:** [dell.com](http://dell.com)
- **Founded:** 1991
- **Presence:** NASDAQ:DELL

**Overview**

- After Dell’s acquisition of SonicWALL in 2012, Dell leveraged its existing presence to establish a strong NGFW strategy.

**Strengths**

- The Dell (SonicWALL) NGFW Series has a strong feature set, missing only NAC.
- The product’s interface was one of the best of the solutions evaluated. It was interactive, featuring an attractive and useful geographical map to show where the firewalls were located. It also included data transfer reporting to see what it was costing the organization by day (ideal for demonstrating product effectiveness). Many of the offered reporting options were also attractive.

**Challenges**

- Currently the NGFW series is only available through hardware and virtual deployments, limiting the options organizations have for their NGFW.

3 year TCO for this solution falls into pricing tier 5, between $50,000 and $100,000.

Pricing provided by vendor

$1

$2.5M+
The SuperMassive, NSA, and TZ series all offer one of the strongest feature sets in this evaluation.

**Product**

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Overall</th>
<th>Features</th>
<th>Usability</th>
<th>Afford.</th>
<th>Arch.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inno.</td>
<td>⭐⭐⭐⭐⭐</td>
<td>⭐⭐⭐⭐⭐</td>
<td>⭐⭐⭐⭐⭐</td>
<td>⭐⭐⭐⭐⭐</td>
<td>⭐⭐⭐⭐</td>
</tr>
<tr>
<td>Cha.</td>
<td>⭐⭐⭐⭐⭐</td>
<td>⭐⭐⭐⭐⭐</td>
<td>⭐⭐⭐⭐⭐</td>
<td>⭐⭐⭐⭐⭐</td>
<td>⭐⭐⭐⭐</td>
</tr>
<tr>
<td>Emer.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mark.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Social Features for Customer Service**

- FW Throughput Ranges
- Solutions range from 200 Mbps to 40 Gbps

**Features**

- Identity
- DLP
- WCF
- App Control
- App FW
- NAC
- Wi-Fi
- WAN
- Encryption

![Value Index](image)

85

3rd out of 10

**Info-Tech Recommends:**

The one downside to the otherwise stellar Dell (SonicWALL)’s firewalls is that they currently only offer hardware and virtual deployment options. But for organizations that want a highly competitive and affordable solution, Dell (SonicWALL)’s firewall products are ideal choices.
Fortinet offers a best all-around NGFW solution

**Champion**

- **Product:** FortiGate NGFW
- **Employees:** 2,300
- **Headquarters:** Sunnyvale, CA
- **Website:** [fortinet.com](http://fortinet.com)
- **Founded:** 2000
- **Presence:** NASDAQ:FTNT

**Overview**

- Fortinet helped define the UTM space with its original FortiGate. Fortinet’s firewalls still remain its strongest product, even with its expanded portfolio.

**Strengths**

- Fortinet offers a wide range of deployment options: hardware appliances, cloud-ready, multi-tenant/virtual domain options, and through Amazon Web Services. In today’s diverse market, organizations are looking beyond simply hardware, giving Fortinet a competitive advantage.
- While Fortinet has only been in the space since 2000, organizations can feel confident in its overall stability and strong growth internationally – including support options.

**Challenges**

- Fortinet’s web application firewall capability is in a separate product, rather than an inherent capability of the NGFW product.
FortiGate NGFW is feature rich, with flexible deployment options

Value Index

42
4th out of 10

Info-Tech Recommends:

Fortinet’s FortiGate solution is ideal for organizations looking for a lot of bells and whistles, along with the budget to afford it. The solution also offers a range of deployment possibilities from cloud-ready options to Amazon Web Services.
WatchGuard’s XTM series is the best bang for any organization’s buck

**Champion**

<table>
<thead>
<tr>
<th>Product:</th>
<th>XTM Series</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees:</td>
<td>400+</td>
</tr>
<tr>
<td>Headquarters:</td>
<td>Seattle, WA</td>
</tr>
<tr>
<td>Website:</td>
<td>watchguard.com</td>
</tr>
<tr>
<td>Founded:</td>
<td>2006</td>
</tr>
<tr>
<td>Presence:</td>
<td>Privately Held</td>
</tr>
</tbody>
</table>

**Overview**

- WatchGuard strongly, through no longer exclusively, focuses on the firewalling needs of the SMB space. The company is strong and the products able.

**Strengths**

- WatchGuard’s XTM series offers the best bang-for-your-buck with an affordable price for a solid and scalable product.
- The XTM firewall can provide reports from different levels (executive dashboard, security dashboard, threat map, etc.), and each dashboard includes various components that are clickable to provide detailed event information in an attractive way—a differentiator amongst its competitors.

**Challenges**

- The XTM series is missing some key advanced features such as web application firewalling and NAC.
WatchGuard’s affordability is unprecedented in this evaluation

Vendor Landscape

Product

Vendor

Social Features for Customer Service

WatchGuard recommended the 5 Series and the 800 Series for our pricing scenario, so the ranges are spec’d out here. The 5 Series ranges from 2 Gbps to 3.5 Gbps. The 800 Series ranges from 8 bps to 14 Gbps.

Features

Info-Tech Recommends:

With a solid advanced features set and the right price, WatchGuard’s XTM series also offers good scalability, making it a good choice for any-sized organization looking to stay within a budget.
Sophos’ SG Series’ full feature set and high performance makes it a leader

**Champion**

- **Product:** SG Series
- **Employees:** 2,200+
- **Headquarters:** Oxford, UK & Boston, MA
- **Website:** sophos.com
- **Founded:** 1985
- **Presence:** Privately Held

**Overview**

- Acquired NGFW company, Cyberoam, in 2014 demonstrating its increased focus on the firewall space, as they also transition to the high performance SG Series.

**Strengths**

- Sophos SG Series has a full advanced features set – meaning all of the capabilities are there if you want all features (such as DLP, web application firewalling, etc.) turned on your NGFW.
- The SG Series interface is highly configurable for network definitions, offers bandwidth control, a wide range of reporting options, drag-and-drop functionality for rule creation, and more.

**Challenges**

- Sophos’s products are typically more expensive than other comparable solutions; but with this solution – what you pay for is what you get.

3 year TCO for this solution falls into pricing tier 6, between $100,000 and $250,000

Pricing provided by vendor
Sophos’ high performance SG Series demonstrates a competitive feature set

Vendor Landscape

<table>
<thead>
<tr>
<th>Product</th>
<th>Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>Features</td>
</tr>
<tr>
<td></td>
<td>🌟</td>
</tr>
</tbody>
</table>

Info-Tech Recommends:

Sophos’ NGFW has all of the advanced features evaluated. The vendor’s one downside is that its products are often on the pricier side. Organizations with the right budget, or larger organizations dealing with a lot of data, will appreciate the comprehensiveness and performance of Sophos’ firewalls.

Value Index

11

6th out of 10

Social Features for Customer Service

FW Throughput Ranges

Solutions range from 11 Gbps to 27 Gbps

Features

- Identity
- DLP
- WCF
- App Control
- App FW
- NAC
- Wi-Fi
- WAN
- Encryption

Vendor Landscape: NGFW

Info-Tech Research Group
Cisco users will appreciate ASA’s firewall range, with diverse deployment options

**Market Pillar**

- **Product:** ASA 5500-X Series NGFW
- **Employees:** 70,000+
- **Headquarters:** San Jose, CA
- **Website:** cisco.com
- **Founded:** 1984
- **Presence:** NASDAQ:CSCO

**Overview**
- By virtue of leveraging its dominant networking market share, Cisco is one of the largest firewall vendors in the world.

**Strengths**
- Cisco’s ASA firewalls offer an easy-to-configure dashboard, with options for reporting such as identity-based reporting and device-based reporting.
- Despite Cisco being viewed as primarily a network vendor, its global presence has created a good reputation for the ASA line, particularly for organizations that are already Cisco shops.

**Challenges**
- One minor loss in terms of the firewall’s reporting functionality is that there are no built-in templates for compliance requirements like PCI-DSS.

3 year TCO for this solution falls into pricing tier 6, between $100,000 and $250,000

Pricing provided by vendor
Cisco has a decent firewall, but tends to be more expensive than others in the space

**Value Index**

10

7th out of 10

**Info-Tech Recommends:**

Cisco has leveraged its network presence to build a solid reputation for its ASA firewalls; however, lack of deployment options can turn some organizations away that are looking for virtual appliances, for example. Regardless, Cisco-shop organizations will find the ASA solutions work well with their current architecture.
McAfee’s vendor stability can’t make up for its lack of advanced features

**Market Pillar**

- **Product:** Next Generation FW
- **Employees:** 7,637
- **Headquarters:** Santa Clara, CA
- **Website:** mcafee.com
- **Founded:** 2003
- **Presence:** NASDAQ:ITNC

**Overview**

- Now a wholly-owned division of Intel, McAfee is the world’s largest dedicated security solutions provider. It entered the firewall market via its 2008 acquisition of Secure Computing.

**Strengths**

- Viability, reach, and channel capabilities that are unparalleled make this a vendor that enterprises can trust if they’re looking for a long-term relationship with a vendor.
- The management console integrates with the ePolicy Orchestrator (ePO), McAfee’s holistic management platform. It offers centralized management of the entire McAfee stack through a single console.

**Challenges**

- McAfee’s NGFW product is lacking in some key advanced features such as DLP, NAC, Wi-Fi network control, and encrypted data inspection.

The vendor declined to provide pricing, and publicly available pricing could not be found.
McAfee, despite being a security giant, is lagging behind its firewall competitors

<table>
<thead>
<tr>
<th>Vendor Landscape</th>
<th>Product</th>
<th>Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>Features</td>
<td>Usability</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Social Features for Customer Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>FW Throughput Ranges</td>
</tr>
<tr>
<td>Solutions range from 10 Gbps to 120 Gbps</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identity</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

The vendor declined to provide pricing, and publicly available pricing could not be found.

Info-Tech Recommends:

McAfee’s ePO Orchestrator and its presence in the market are its main differentiators. The ability to centrally manage its portfolio is attractive to organizations that need that convenience. Other than that, the NGFW product is lacking key advanced features that its competitors have had for years.
Barracuda is a great match for mid-range organizations, with its solid solution & robust firewall

### Overview
- Barracuda built its business on mid-range cost, high function spam and malware “firewalls,” and has continued to grow its portfolio. It entered the NGFW market via its 2009 acquisition of Phion.

### Strengths
- Barracuda offers one of the strongest feature sets out of the solutions evaluated, including capabilities such as Data Leakage Prevention (DLP) and some web application firewalling through its IPS engine.
- NG Firewall has great usability, with a column that shows real-time events and highly customizable reporting functions.
- The product also allows you to do a deep application dive where admins can actually click on the files and see exactly what their users had been viewing.

### Challenges
- Since entering the NGFW market a little later than other competitors, Barracuda has been working towards more market share; however, name recognition is developing.

### Innovator

<table>
<thead>
<tr>
<th>Product</th>
<th>NG Firewall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees</td>
<td>1,100</td>
</tr>
<tr>
<td>Headquarters</td>
<td>Campbell, CA</td>
</tr>
<tr>
<td>Website</td>
<td><a href="http://barracuda.com">barracuda.com</a></td>
</tr>
<tr>
<td>Founded</td>
<td>2003</td>
</tr>
<tr>
<td>Presence</td>
<td>NYSE:CUDA</td>
</tr>
</tbody>
</table>

Pricing provided by vendor

3 year TCO for this solution falls into pricing tier 5, between $50,000 and $100,000
Barracuda is an underrated player with a competitive solution

Vendor Landscape: NGFW

Info-Tech Recommends:

Barracuda may not be top-of-mind when it comes to these products, but organizations are aware of its good reputation in the space. This NGFW solution is ideal for mid-sized organizations looking for an option outside of their traditional choices.

Value Index

92

2nd out of 10

Solutions range from 300 Mbps to 22.2 Gbps

FW Throughput Ranges

FW Throughput Ranges

Features

Identity DLP WCF App Control App FW NAC Wi-Fi WAN Encryption

Overall Features Usability Afford. Arch. Overall Viability Strategy Reach Channel

Social Features for Customer Service
Juniper’s features set and product range make it one of the most robust solutions

Emerging Player

<table>
<thead>
<tr>
<th>Product</th>
<th>SRX</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees</td>
<td>9,000</td>
</tr>
<tr>
<td>Headquarters</td>
<td>Sunnyvale, CA</td>
</tr>
<tr>
<td>Website</td>
<td>juniper.net</td>
</tr>
<tr>
<td>Founded</td>
<td>1996</td>
</tr>
<tr>
<td>Presence</td>
<td>NASDAQ:JNPR</td>
</tr>
</tbody>
</table>

Overview

- Juniper is a high performance networking and security company. The acquisition of NetScreen in 2004 formed the basis of its enterprise firewall capabilities; one segment of its market-leading security portfolio.

Strengths

- Juniper’s SRX series offers a full feature set, giving the product a lot of options for organizations looking for a top-of-the-line product.
- Juniper’s been a fairly long-standing vendor, and despite entering the firewall market in 2004, has secured itself strongly in the market with its SRX product and channel strength.
- Juniper’s Junos Central is an online area where customers have the opportunity to engage in training, live webinars, etc., fostering an educational community.

Challenges

- Juniper has limited deployment options: only hardware and software available.

3 year TCO for this solution falls into pricing tier 6, between $100,000 and $250,000

Pricing provided by vendor
Juniper’s SRX series offers a full advanced features set for comprehensive protection

Organizations looking for the ability to turn on all NGFW features should add Juniper to their vendor shortlist. One downside is that the scalability of the range is primarily for enterprise-sized organizations and may not appeal to mid-sized.
Check Point continues to be the standard for firewalls

Emerging Player

Product: Next Generation FW
Employees: 2,200
Headquarters: Redwood City, CA
Website: checkpoint.com
Founded: 1993
Presence: NASDAQ:CHKP

Overview

- A long-standing competitor in the security space, Check Point’s core focus has always been firewalls.

Strengths

- Name-recognition and stability are key strengths of Check Point. Organizations looking for industry standards and requiring straightforward deployment options – hardware, software, or virtual – will appreciate Check Point’s solid presence in the market.
- Check Point’s software blade architecture can provide some organizations with the flexibility they are looking for, with each capability existing as an add-on blade.

Challenges

- While it is one of its strengths, some users have reviewed the software blade architecture as clunky and confusing.
- Despite being one of the first firewall providers, Check Point has been lacking innovation in the space for a few years.

The vendor declined to provide pricing, and publicly available pricing could not be found.
Check Point offers some scalability and vendor reliability

Vendor Landscape: NGFW

Info-Tech Recommends:

Check Point is still top of mind when it comes to firewalls. Organizations that are looking for vendor longevity, and that also appreciate Check Point’s software blade architecture that lets you add what capabilities you want, will find a good fit with its Next Generation FW.
Palo Alto needs to enhance its NGFW offering to remain competitive

Emerging Player

- **Product:** PA Series
- **Employees:** 1,550
- **Headquarters:** Santa Clara, CA
- **Website:** paloaltonetworks.com
- **Founded:** 2005
- **Presence:** NYSE:PANW

Overview

- Palo Alto released its first appliance in 2007, and has been a established standard within the space since then, with over 17,000 customers in over 120 countries.

Strengths

- Palo Alto features a straightforward interface, with a good display of traffic flow, as well as user activity.
- The PA Series offers basic deployment options: hardware, software, and virtual platforms.
- Palo Alto still isn’t a pure-play vendor, but organizations looking for more product focus on NGFW over a broad portfolio of various solutions, will appreciate that it is a core priority of Palo Alto.

Challenges

- The vendor declined to provide pricing, and publicly available pricing could not be found

- A relatively “newer” vendor in the space, the PA Series is missing some key advanced features such as Wi-Fi Network Control, NAC, DLP, and web application firewalling – preventing it from being truly competitive in terms of overall capabilities.
Palo Alto offers flexible deployment offices, but not an ideal solution in an increasingly competitive market.

Info-Tech Recommends:

Palo Alto, while a stable vendor, is lacking key advanced features – despite having a focus on NGFW. However, Palo Alto does have strong channel partners such as RSA and Citrix, so they can be an attractive option for organizations interested in that aspect.
Identify leading candidates with the Next Generation Firewall Vendor Shortlist & Detailed Feature Analysis Tool

The Info-Tech Next Generation Firewall Vendor Shortlist & Detailed Feature Analysis Tool is designed to generate a customized shortlist of vendors based on your key priorities.

This tool offers the ability to modify:

Overall Vendor vs. Product Weightings

- Individual product criteria weightings:
  - Features
  - Usability
  - Affordability
  - Architecture

- Individual vendor criteria weightings:
  - Viability
  - Strategy
  - Reach
  - Channel

Custom Vendor Landscape™ and Vendor Shortlist

Your customized Vendor Shortlist is sorted based on the priorities identified on the Data Entry tab. Scores are calculated using the criteria weightings and the assigned Info-Tech Vendor Landscape scores. Scores are normalized based on the weighted average Vendor Score and the weighted average Product Score. A custom Vendor Landscape™ has been generated as well, plotting the weighted average Vendor Score against the weighted average Product Score.

Custom Vendor Landscape™ for [Enterprise Name Here]
Appendix

1. Vendor Landscape Methodology: Overview
2. Vendor Landscape Methodology: Product Selection & Information Gathering
3. Vendor Landscape Methodology: Scoring
4. Vendor Landscape Methodology: Information Presentation
5. Vendor Landscape Methodology: Fact Check & Publication
6. Product Pricing Scenario
Vendor Landscape Methodology: Overview

Info-Tech’s Vendor Landscapes are research materials that review a particular IT market space, evaluating the strengths and abilities of both the products available in that space, as well as the vendors of those products. These materials are created by a team of dedicated analysts operating under the direction of a senior subject matter expert over a period of six weeks.

Evaluations weigh selected vendors and their products (collectively “solutions”) on the following eight criteria to determine overall standing:

• Features: The presence of advanced and market-differentiating capabilities.
• Usability: The intuitiveness, power, and integrated nature of administrative consoles and client software components.
• Affordability: The three-year total cost of ownership of the solution.
• Architecture: The degree of integration with the vendor’s other tools, flexibility of deployment, and breadth of platform applicability.
• Viability: The stability of the company as measured by its history in the market, the size of its client base, and its financial performance.
• Strategy: The commitment to both the market-space, as well as to the various sized clients (small, mid-sized, and enterprise clients).
• Reach: The ability of the vendor to support its products on a global scale.
• Channel: The measure of the size of the vendor’s channel partner program, as well as any channel strengthening strategies.

Evaluated solutions are plotted on a standard two by two matrix:

• Champions: Both the product and the vendor receive scores that are above the average score for the evaluated group.
• Innovators: The product receives a score that is above the average score for the evaluated group, but the vendor receives a score that is below the average score for the evaluated group.
• Market Pillars: The product receives a score that is below the average score for the evaluated group, but the vendor receives a score that is above the average score for the evaluated group.
• Emerging Players: Both the product and the vendor receive scores that are below the average score for the evaluated group.

Info-Tech’s Vendor Landscapes are researched and produced according to a strictly adhered to process that includes the following steps:

• Vendor/product selection
• Information gathering
• Vendor/product scoring
• Information presentation
• Fact checking
• Publication

This document outlines how each of these steps is conducted.
Vendor Landscape Methodology: Vendor/Product Selection & Information Gathering

Info-Tech works closely with its client base to solicit guidance in terms of understanding the vendors with whom clients wish to work and the products that they wish evaluated; this demand pool forms the basis of the vendor selection process for Vendor Landscapes. Balancing this demand, Info-Tech also relies upon the deep subject matter expertise and market awareness of its Senior, Lead, and Principle Research Analysts to ensure that appropriate solutions are included in the evaluation. As an aspect of that expertise and awareness, Info-Tech’s analysts may, at their discretion, determine the specific capabilities that are required of the products under evaluation, and include in the Vendor Landscape only those solutions that meet all specified requirements.

Information on vendors and products is gathered in a number of ways via a number of channels.

Initially, a request package is submitted to vendors to solicit information on a broad range of topics. The request package includes:

• A detailed survey.
• A pricing scenario (see Vendor Landscape Methodology: Price Evaluation and Pricing Scenario, below).
• A request for reference clients.
• A request for a briefing and, where applicable, guided product demonstration.

These request packages are distributed approximately twelve weeks prior to the initiation of the actual research project to allow vendors ample time to consolidate the required information and schedule appropriate resources.

During the course of the research project, briefings and demonstrations are scheduled (generally for one hour each session, though more time is scheduled as required) to allow the analyst team to discuss the information provided in the survey, validate vendor claims, and gain direct exposure to the evaluated products. Additionally, an end-user survey is circulated to Info-Tech’s client base and vendor-supplied reference accounts are interviewed to solicit their feedback on their experiences with the evaluated solutions and with the vendors of those solutions.

These materials are supplemented by a thorough review of all product briefs, technical manuals, and publicly available marketing materials about the product, as well as about the vendor itself.

Refusal by a vendor to supply completed surveys or submit to participation in briefings and demonstrations does not eliminate a vendor from inclusion in the evaluation. Where analyst and client input has determined that a vendor belongs in a particular evaluation, it will be evaluated as best as possible based on publicly available materials only. As these materials are not as comprehensive as a survey, briefing, and demonstration, the possibility exists that the evaluation may not be as thorough or accurate. Since Info-Tech includes vendors regardless of vendor participation, it is always in the vendor’s best interest to participate fully.

All information is recorded and catalogued, as required, to facilitate scoring and for future reference.
Vendor Landscape Methodology: Scoring

Once all information has been gathered and evaluated for all vendors and products, the analyst team moves to scoring. All scoring is performed at the same time so as to ensure as much consistency as possible. Each criterion is scored on a ten point scale, though the manner of scoring for criteria differs slightly:

- Features is scored via **Cumulative Scoring**
- Affordability is scored via **Scalar Scoring**
- All other criteria are scored via **Base5 Scoring**

In Cumulative Scoring, a single point is assigned to each evaluated feature that is regarded as being fully present, partial points to each feature that is partially present, and zero points to features that are deemed to be absent or unsatisfactory. The assigned points are summed and normalized to a value out of ten. For example, if a particular Vendor Landscape evaluates eight specific features in the Feature Criteria, the summed score out of eight for each evaluated product would be multiplied by 1.25 to yield a value out of ten.

In Scalar Scoring, a score of ten is assigned to the lowest cost solution, and a score of one is assigned to the highest cost solution. All other solutions are assigned a mathematically determined score based on their proximity to / distance from these two endpoints. For example, in an evaluation of three solutions, where the middle cost solution is closer to the low end of the pricing scale it will receive a higher score, and where it is closer to the high end of the pricing scale it will receive a lower score; depending on proximity to the high or low price it is entirely possible that it could receive either ten points (if it is very close to the lowest price) or one point (if it is very close to the highest price). Where pricing cannot be determined (vendor does not supply price and public sources do not exist), a score of 0 is automatically assigned.

In Base5 scoring a number of sub-criteria are specified for each criterion (for example, Longevity, Market Presence, and Financials are sub-criteria of the Viability criterion), and each one is scored on the following scale:

- 5 - The product/vendor is exemplary in this area (nothing could be done to improve the status).
- 4 - The product/vendor is good in this area (small changes could be made that would move things to the next level).
- 3 - The product/vendor is adequate in this area (small changes would make it good, more significant changes required to be exemplary).
- 2 - The product/vendor is poor in this area (this is a notable weakness and significant work is required).
- 1 - The product/vendor is terrible/fails in this area (this is a glaring oversight and a serious impediment to adoption).

The assigned points are summed and normalized to a value out of ten as explained in Cumulative Scoring above.

Scores out of ten, known as Raw scores, are transposed as-is into Info-Tech’s Vendor Landscape Shortlist Tool, which automatically determines Vendor Landscape positioning (see Vendor Landscape Methodology: Information Presentation - Vendor Landscape, below), Criteria Score (see Vendor Landscape Methodology: Information Presentation - Criteria Score, below), and Value Index (see Vendor Landscape Methodology: Information Presentation - Value Index, below).
Vendor Landscape Methodology: Information Presentation – Vendor Landscape

Info-Tech’s Vendor Landscape is a two-by-two matrix that plots solutions based on the combination of Product score and Vendor score. Placement is not determined by absolute score, but instead by relative score. Relative scores are used to ensure a consistent view of information and to minimize dispersion in nascent markets, while enhancing dispersion in commodity markets to allow for quick visual analysis by clients.

Relative scores are calculated as follows:

1. Raw scores are transposed into the Info-Tech Vendor Landscape Shortlist Tool (for information on how Raw scores are determined, see Vendor Landscape Methodology: Scoring, above).
2. Each individual criterion Raw score is multiplied by the pre-assigned weighting factor for the Vendor Landscape in question. Weighting factors are determined prior to the evaluation process to eliminate any possibility of bias. Weighting factors are expressed as a percentage such that the sum of the weighting factors for the Vendor criteria (Viability, Strategy, Reach, Channel) is 100% and the sum of the Product criteria (Features, Usability, Affordability, Architecture) is 100%.
3. A sum-product of the weighted Vendor criteria scores and of the weighted Product criteria scores is calculated to yield an overall Vendor score and an overall Product score.
4. Overall Vendor scores are then normalized to a 20 point scale by calculating the arithmetic mean and standard deviation of the pool of Vendor scores. Vendors for whom their overall Vendor score is higher than the arithmetic mean will receive a normalized Vendor score of 11-20 (exact value determined by how much higher than the arithmetic mean their overall Vendor score is), while vendors for whom their overall Vendor score is lower than the arithmetic mean will receive a normalized Vendor score of between one and ten (exact value determined by how much lower than the arithmetic mean their overall Vendor score is).
5. Overall Product score is normalized to a 20 point scale according to the same process.
6. Normalized scores are plotted on the matrix, with Vendor score being used as the x-axis, and Product score being used as the y-axis.

Vendor Landscape

- **Innovators:** solutions with below average Vendor scores and above average Product scores.
- **Champions:** solutions with above average Vendor scores and above average Product scores.
- **Emerging Players:** solutions with below average Vendor scores and below average Product scores.
- **Market Pillars:** solutions with above average Vendor scores and below average Product scores.
Vendor Landscape Methodology: Information Presentation – Criteria Scores (Harvey Balls)

Info-Tech’s criteria scores are visual representations of the absolute score assigned to each individual criterion, as well as of the calculated overall vendor and product scores. The visual representation used is Harvey Balls.

Harvey Balls are calculated as follows:

1. Raw scores are transposed into the Info-Tech Vendor Landscape Shortlist Tool (for information on how raw scores are determined, see Vendor Landscape Methodology: Scoring, above).

2. Each individual criterion raw score is multiplied by a pre-assigned weighting factor for the Vendor Landscape in question. Weighting factors are determined prior to the evaluation process, based on the expertise of the Senior or Lead Research Analyst, to eliminate any possibility of bias. Weighting factors are expressed as a percentage, such that the sum of the weighting factors for the vendor criteria (Viability, Strategy, Reach, Channel) is 100%, and the sum of the product criteria (Features, Usability, Affordability, Architecture) is 100%.

3. A sum-product of the weighted vendor criteria scores and of the weighted product criteria scores is calculated to yield an overall vendor score and an overall product score.

4. Both overall vendor score / overall product score, as well as individual criterion raw scores are converted from a scale of one to ten to Harvey Ball scores on a scale of zero to four, where exceptional performance results in a score of four and poor performance results in a score of zero.

5. Harvey Ball scores are converted to Harvey Balls as follows:
   - A score of four becomes a full Harvey Ball.
   - A score of three becomes a three-quarter full Harvey Ball.
   - A score of two becomes a half-full Harvey Ball.
   - A score of one becomes a one-quarter full Harvey Ball.
   - A score of zero becomes an empty Harvey Ball.

6. Harvey Balls are plotted by solution in a chart where rows represent individual solutions and columns represent overall vendor / overall product, as well as individual criteria. Solutions are ordered in the chart alphabetically by vendor name.
Vendor Landscape Methodology: Information Presentation – Feature Ranks (Stoplights)

Info-Tech’s Feature Ranks are visual representations of the presence/availability of individual features that collectively comprise the Features’ criteria. The visual representation used is stoplights.

Stoplights are determined as follows:

1. A single point is assigned to each evaluated feature that is regarded as being fully present, partial points to each feature that is partially present, and zero points to features that are deemed to be fully absent or unsatisfactory.
   - Fully present means all aspects and capabilities of the feature as described are in evidence.
   - Fully absent means all aspects and capabilities of the feature as described are missing or lacking.
   - Partially present means some, but not all, aspects and capabilities of the feature as described are in evidence, OR all aspects and capabilities of the feature as described are in evidence, but only for some models in a line.

2. Feature scores are converted to stoplights as follows:
   - Full points become a green light.
   - Partial points become a yellow light.
   - Zero points become a red light.

3. Stoplights are plotted by solution in a chart where rows represent individual solutions and columns represent individual features. Solutions are ordered in the chart alphabetically by vendor name.

For example, a set of applications is being reviewed and a feature of “Integration with Mobile Devices” that is defined as “availability of dedicated mobile device applications for iOS, Android, and BlackBerry devices” is specified. Solution A provides such apps for all listed platforms and scores “green,” solution B provides apps for iOS and Android only and scores “yellow,” while solution C provides mobile device functionality through browser extensions, has no dedicated apps, and so scores “red.”

<table>
<thead>
<tr>
<th>Features</th>
<th>Stoplights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feature 1</td>
<td>Green</td>
</tr>
<tr>
<td>Feature 2</td>
<td>Green</td>
</tr>
<tr>
<td>Feature 3</td>
<td>Green</td>
</tr>
<tr>
<td>Feature 4</td>
<td>Red</td>
</tr>
<tr>
<td>Feature 5</td>
<td>Red</td>
</tr>
<tr>
<td>Feature 6</td>
<td>Yellow</td>
</tr>
<tr>
<td>Feature 7</td>
<td>Red</td>
</tr>
<tr>
<td>Feature 8</td>
<td>Red</td>
</tr>
</tbody>
</table>
Info-Tech’s Value Index is an indexed ranking of solution value per dollar as determined by the raw scores assigned to each criteria (for information on how raw scores are determined, see Vendor Landscape Methodology: Scoring, above).

Value scores are calculated as follows:

1. The Affordability criterion is removed from the overall product score and the remaining product score criteria (Features, Usability, Architecture) are reweighted so as to retain the same weightings relative to one another, while still summing to 100%. For example, if all four product criteria were assigned base weightings of 25%, for the determination of the Value Score, Features, Usability, and Architecture would be reweighted to 33.3% each to retain the same relative weightings while still summing to 100%.

2. A sum-product of the weighted vendor criteria scores and of the reweighted product criteria scores is calculated to yield an overall vendor score and a reweighted overall Product score.

3. The overall vendor score and the reweighted overall product score are then summed, and this sum is multiplied by the Affordability raw score to yield an interim Value Score for each solution.

4. All interim Value Scores are then indexed to the highest performing solution by dividing each interim Value Score by the highest interim Value Score. This results in a Value Score of 100 for the top solution and an indexed Value Score relative to the 100 for each alternate solution.

5. Solutions are plotted according to Value Score, with the highest score plotted first, and all remaining scores plotted in descending numerical order.

Where pricing is not provided by the vendor and public sources of information cannot be found, an Affordability raw score of zero is assigned. Since multiplication by zero results in a product of zero, those solutions for which pricing cannot be determined receive a Value Score of zero. Since Info-Tech assigns a score of zero where pricing is not available, it is always in the vendor’s best interest to provide accurate and up to date pricing. In the event that insufficient pricing is available to accurately calculate a Value Index, Info-Tech will omit it from the Vendor Landscape.
Vendor Landscape Methodology:
Information Presentation – Price Evaluation: Mid-Market

Info-Tech’s Price Evaluation is a tiered representation of the three-year Total Cost of Ownership (TCO) of a proposed solution. Info-Tech uses this method of communicating pricing information to provide high-level budgetary guidance to its end-user clients while respecting the privacy of the vendors with whom it works. The solution TCO is calculated and then represented as belonging to one of ten pricing tiers.

Pricing tiers are as follows:
1. Between $1 and $2,500
2. Between $2,500 and $10,000
3. Between $10,000 and $25,000
4. Between $25,000 and $50,000
5. Between $50,000 and $100,000
6. Between $100,000 and $250,000
7. Between $250,000 and $500,000
8. Between $500,000 and $1,000,000
9. Between $1,000,000 and $2,500,000
10. Greater than $2,500,000

Where pricing is not provided, Info-Tech makes use of publicly available sources of information to determine a price. As these sources are not official price lists, the possibility exists that they may be inaccurate or outdated, and so the source of the pricing information is provided. Since Info-Tech publishes pricing information regardless of vendor participation, it is always in the vendor’s best interest to supply accurate and up to date information.

Info-Tech’s Price Evaluations are based on pre-defined pricing scenarios (see Product Pricing Scenario, below) to ensure a comparison that is as close as possible between evaluated solutions. Pricing scenarios describe a sample business and solicit guidance as to the appropriate product/service mix required to deliver the specified functionality, the list price for those tools/services, as well as three full years of maintenance and support.
Vendor Landscape Methodology: Information Presentation – Scenarios

Info-Tech’s Scenarios highlight specific use use cases for the evaluated solution to provide as complete (when taken in conjunction with the individual written review, Vendor Landscape, Criteria Scores, Feature Ranks, and Value Index) a basis for comparison by end-user clients as possible.

Scenarios are designed to reflect tiered capability in a particular set of circumstances. Determination of the Scenarios in question is at the discretion of the analyst team assigned to the research project. Where possible, Scenarios are designed to be mutually exclusive and collectively exhaustive, or at the very least, hierarchical such that the tiers within the Scenario represent a progressively greater or broader capability.

Scenario ranking is determined as follows:

1. The analyst team determines an appropriate use case.
   
   For example:
   
   • Clients that have multinational presence and require vendors to provide four-hour onsite support.

2. The analyst team establishes the various tiers of capability.
   
   For example:
   
   • Presence in Americas
   • Presence in EMEA
   • Presence in APAC

3. The analyst team reviews all evaluated solutions and determines which ones meet which tiers of capability.
   
   For example:
   
   • Presence in Americas – Vendor A, Vendor C, Vendor E
   • Presence in EMEA – Vendor A, Vendor B, Vendor C
   • Presence in APAC – Vendor B, Vendor D, Vendor E

4. Solutions are plotted on a grid alphabetically by vendor by tier. Where one vendor is deemed to be stronger in a tier than other vendors in the same tier, they may be plotted non-alphabetically.
   
   For example:
   
   • Vendor C is able to provide four-hour onsite support to 12 countries in EMEA while Vendors A and B are only able to provide four-hour onsite support to eight countries in EMEA; Vendor C would be plotted first, followed by Vendor A, then Vendor B.

Analysts may also elect to list only the most Exemplary Performers for a given use case. One to three vendors will appear for each of these purchasing scenarios with a brief explanation as to why we selected them as top-of-class.
Vendor Landscape Methodology: Information Presentation – Vendor Awards

At the conclusion of all analyses, Info-Tech presents awards to exceptional solutions in three distinct categories. Award presentation is discretionary; not all awards are extended subsequent to each Vendor Landscape and it is entirely possible, though unlikely, that no awards may be presented.

Awards categories are as follows:

- **Champion Awards** are presented to those solutions, and only those solutions, that land in the Champion zone of the Info-Tech Vendor Landscape (see Vendor Landscape Methodology: Information Presentation - Vendor Landscape, above). If no solutions land in the Champion zone, no Champion Awards are presented. Similarly, if multiple solutions land in the Champion zone, multiple Champion Awards are presented.

- **Trend Setter Awards** are presented to those solutions, and only those solutions, that are deemed to include the most original/inventive product/service, or the most original/inventive feature/capability of a product/service. If no solution is deemed to be markedly or sufficiently original/inventive, either as a product/service on the whole or by feature/capability specifically, no Trend Setter Award is presented. Only one Trend Setter Award is available for each Vendor Landscape.

- **Best Overall Value Awards** are presented to those solutions, and only those solutions, that are ranked highest on the Info-Tech Value Index (see Vendor Landscape Methodology: Information Presentation – Value Index, above). If insufficient pricing information is made available for the evaluated solutions, such that a Value Index cannot be calculated, no Best Overall Value Award will be presented. Only one Best Overall Value Award is available for each Vendor Landscape.
Vendor Landscape Methodology: Fact Check & Publication

Info-Tech takes the factual accuracy of its Vendor Landscapes, and indeed of all of its published content, very seriously. To ensure the utmost accuracy in its Vendor Landscapes, we invite all vendors of evaluated solutions (whether the vendor elected to provide a survey and/or participate in a briefing or not) to participate in a process of fact check.

Once the research project is complete and the materials are deemed to be in a publication ready state, excerpts of the material specific to each vendor’s solution are provided to the vendor. Info-Tech only provides material specific to the individual vendor’s solution for review encompassing the following:

- All written review materials of the vendor and the vendor’s product that comprise the evaluated solution.
- Info-Tech’s Criteria Scores / Harvey Balls detailing the individual and overall vendor / product scores assigned.
- Info-Tech’s Feature Rank / stoplights detailing the individual feature scores of the evaluated product.
- Info-Tech’s Raw Pricing for the vendor either as received from the vendor or as collected from publicly available sources.
- Info-Tech’s Scenario ranking for all considered scenarios for the evaluated solution.

Info-Tech does not provide the following:

- Info-Tech’s Vendor Landscape placement of the evaluated solution.
- Info-Tech’s Value Score for the evaluated solution.
- End-user feedback gathered during the research project.
- Info-Tech’s overall recommendation in regard to the evaluated solution.

Info-Tech provides a one-week window for each vendor to provide written feedback. Feedback must be corroborated (be provided with supporting evidence), and where it does, feedback that addresses factual errors or omissions is adopted fully, while feedback that addresses opinions is taken under consideration. The assigned analyst team makes all appropriate edits and supplies an edited copy of the materials to the vendor within one week for final review.

Should a vendor still have concerns or objections at that time, it is invited to a conversation, initially via email, but as required and deemed appropriate by Info-Tech, subsequently via telephone, to ensure common understanding of the concerns. Where concerns relate to ongoing factual errors or omissions, they are corrected under the supervision of Info-Tech’s Vendor Relations personnel. Where concerns relate to ongoing differences of opinion, they are again taken under consideration with neither explicit not implicit indication of adoption.

Publication of materials is scheduled to occur within the six weeks immediately following the completion of the research project, but does not occur until the fact check process has come to conclusion, and under no circumstances are “pre-publication” copies of any materials made available to any client.
Product Pricing Scenario

A mid-level clothing manufacturer/retailer with corporate offices on the US west coast, east coast, and Ireland and with 2,200 global employees is looking to implement a centrally managed endpoint encryption solution. The firm is interested in providing complete and comprehensive coverage for all types of mobile devices, as well as coverage for select non-mobile endpoints.

The corporate office breakdown is as follows:

**US West Coast (Head Office)**
Employing 1,600 people (70% of total staff), the west coast office holds Sales, Finance, Strategy, Marketing, Buyers, and the majority of IT. The IT staff here consists of 45 employees, three of which are dedicated security professionals consisting of one Security Manager and two Security Analysts.

**US East Coast (Satellite)**
Employing 200 people (10% of total staff), the east coast office holds solely a Marketing department.

**Ireland (Satellite)**
Employing 400 people (20% of total staff), the Ireland office employs Buyers and Manufacturing and also a DR facility. Manufacturing consists of 300 employees. The company’s remaining five IT staff are located here, though none have dedicated security responsibilities.

The expected solution capabilities are as follows:

- The organization described is interested in minimizing its security footprint through consolidation of solutions and reduction of the number of security partners with which it works. It has recently consolidated endpoint protection via a comprehensive endpoint protection solution and wishes to consolidate network perimeter protection as much as possible.

- The deployed UTM/NGFW solutions will ideally be managed fully centrally by one of the IT Security staff at the head office with the ability to transfer management to the Ireland facility in the event of a severe outage.
In terms of the IT infrastructure of the organization, consider the following:

General Infrastructure

- Primarily Microsoft Server infrastructure – file, print, and application servers (other than those listed below) fully virtualized.
  - Four domain servers (two at Head Office, one at each of the other offices)
  - HA production virtual server cluster at Head Office (four servers) + separate development and QA virtual server cluster in Ireland (two servers – also used for DR purposes).
    - 24 production virtual servers (west coast)
- Exchange 2010 (two servers)
- SharePoint 2010 (single server)
- Oracle DB on Linux (two servers at the US West Coast office, and a single server in Ireland)
- Apache web site and store front on Linux (four server farm)
- 700 Windows 7 laptops; 1100 Windows 7 desktops; 100 Mac OSX desktops
- Blackberry is the standard corporate device (with a single BES server), but iPhone and Android phones are allowed to connect to the network also.
- Gigabit LAN in all three locations
  - West coast office has a dual 100Mbps Internet connection.
  - East coast office has a single 10Mbps Internet connection.
  - Ireland has a single 100Mbps Internet connection and a single 45 Mbps Internet connection.
  - Head office and east coast office connected via site-to-site IPSEC VPN tunnel.
  - Head office and Ireland office connected via 45Mbps MPLS WAN link.
- Telephony is provided by a virtualized VOIP system hosted in the west coast office.
Product Pricing Scenario, continued

**NGFW Infrastructure**

- Spam protection is handled by a cloud-based service.
- Endpoint anti-malware (anti-virus, anti-spyware, etc.), encryption, and DLP via a consolidated anti-malware suite.
- Perimeter protection provided by single function firewalls, to be replaced.
- VPN capabilities provided by single function VPN appliances, to be replaced.
- No IPS, Web Content Filtering, Network Access Control, or network Data Leakage Protection in place, but all are desired.

**Breadth of coverage / duration of deployment:**

- The organization is interested in providing comprehensive and fully redundant protection (redundant devices) for its west coast office and Ireland office, and semi-redundant protection (redundant components) for its east coast office. Please specify appropriate number and type of devices and software license (including management consoles) that would offer this breadth of coverage or, where products are not available to address specific protection capabilities, indicate which protection capabilities are available and which are not.
- Functionality above and beyond the baseline established above (firewall with application control capabilities, IPS, IPSEC and SSL VPN, NAC, DLP, gateway anti-malware) should be separately specified and priced.
- The organization wishes to enter into an agreement that provides for three full years of protection, including licensing, support, and maintenance, and pricing should reflect that term.
- Because the organization operates on a 7/24 hour day (due to a self-hosted website and webstore) it requires support availability over extended hours; any quoted support must be sufficient and appropriate to reflect those operational hours.