Magic Quadrant for SMB Multifunction Firewalls

Adam Hils, Greg Young

This research examines the small-and-midsize-business multifunction firewall market.

WHAT YOU NEED TO KNOW

Small and midsize businesses (SMBs) have very different network security requirements from large enterprises. Multifunction firewalls aren't suitable for large enterprises, and SMBs don't usually require several best-of-breed network security appliances. The SMB multifunction firewall market is large, fragmented, and highly dynamic, with vendors providing a common set of core security features, differentiating with new added safeguards, ease of installation, and use, and addressing the realities of the SMB IT environment.

MAGIC QUADRANT

Figure 1. Magic Quadrant for SMB Multifunction Firewalls
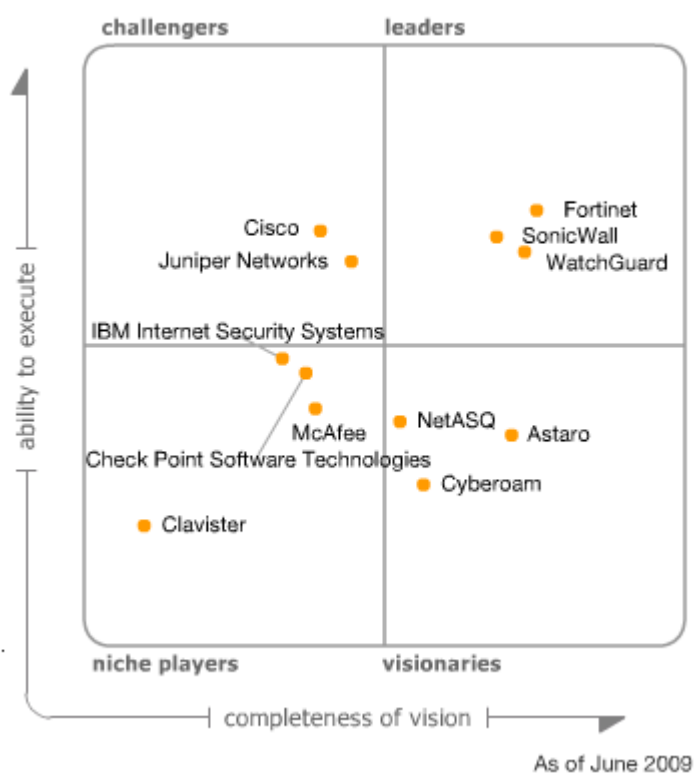
Source: Gartner (June 2009)

Market Overview

For the purpose of this research, Gartner defines SMB organizations based on the number of employees — that is, fewer than 1,000.

The clear and defining characteristic of SMBs is a relative constraint in resource availability compared with larger peers, including:

- Capital expenditures

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- Operational budgets

- Skilled/dedicated IT staff

In other ways, SMBs are exactly the same as their larger counterparts — same industries, same priorities, same target customers — but with far fewer resources.

Market Definition/Description

In 2008, the worldwide SMB multifunction firewall market was worth approximately $1.5 billion, representing 25% growth over Gartner's 2007 estimate, with a forecast of 20% to 25% compound annual growth rate through 2012. The SMB multifunction firewall market is a highly competitive, fragmented market with more than 20 active vendors, several of which didn't meet the inclusion criteria for this Magic Quadrant. Comparing products in this market is complicated by the multiple individual security features within the same appliance, and the varying features that some vendors supply. No vendor can provide best-of-breed functionality across all security technologies, so many vendors share technologies from the same OEM providers (for example, Kaspersky Lab for gateway antivirus or Commtouch for anti-spam lists). In addition, some vendors offer open-source protections with optional "premium" alternatives. Differentiation often comes in the form of integration among security features, licensing flexibility, management console/reporting, and pricing. Leading vendors will:

- Focus on simplicity of deployment and operation.

- Provide proactive attention to channel partners because value-added resellers (VARs) will often be the greatest influencers of this market.

- Introduce new features (for example, HTTPS inspection, Web application firewall, and voice over IP [VoIP] security) ahead of customer requirements.

- Provide pricing that encourages the adoption of new subscription-based protections, but with simplicity that doesn't rely on confusing billing or require frequent changes in payment.

- Focus on SMB needs, rather than attempting to use downsized enterprise products and strategies.

SMBs have network security appliance needs that differ substantially from large enterprise requirements. SMBs sometimes opt for "all in one" or multifunction security appliances built on the "anchor" technology of the firewall. Additional security functions are added to the firewall, sometimes through a subscription fee. This is in contrast to large enterprises, which most often deploy firewalls and other network security functions on discrete appliances to ensure optimal network performance and risk mitigation through multiple security "points of failure," often from multiple best-of-breed vendors.

The feature sets available with these SMB multifunction firewall products typically fall into three categories:

- Network security, which includes firewalls, intrusion prevention systems (IPSs)/intrusion detection systems (IDSs), and virtual private networks (VPNs)

- Web security, which includes Web antivirus and URL filtering

- E-mail security, including e-mail antivirus, instant messaging hygiene, and anti-spam

These features may be available as part of the base product license or as add-on licenses. This diversity is typical of emerging, fragmented information security markets. As the market continues

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to mature, some vendors — which, in the past, offered a confusing array of point prices — have started offering more sensibly priced feature bundles; eventually, the all-in-one pricing model will become the de facto standard for packaging and licensing.

The term "unified threat management" (UTM) is often used to describe products in this market; however, it's misleading because threats are never really "managed," and the protections within multifunction firewalls are rarely "unified." The UTM label has also been co-opted by some vendors to describe their enterprise next-generation firewall offerings, thereby diluting the term's relevance. This market is also distinguished from the enterprise and branch office firewall markets (see "Magic Quadrant for Enterprise Network Firewalls").

Enterprises tend to select several best-of-breed appliances for network security. Branch office firewalls are considered part of the enterprise firewall network market because they're often selected and deployed as extensions of the central firewalls, and don't have the same features as those deployed in SMBs (for example, e-mail antivirus often isn't used in branches where the e-mail servers are centralized; and managing a large number of firewalls is required in branches, but not in an SMB). The term "anti-X" is also used in some vendor marketing to collectively refer to the anti-malware and antivirus functions.

According to Gartner's vendor survey, almost two-thirds of the SMB multifunction firewall replacements that vendors are doing are for legacy, firewall-only products from the enterprise firewall market leaders: Cisco, Check Point Software Technologies, and Juniper Networks; in a change from 2008, about one-third of the responses indicate that some customers are into their second generation of multifunction firewalls, and are replacing such incumbents as SonicWall, WatchGuard, and Fortinet with competitors. By the end of 2010, we expect to see significantly greater numbers of SMB multifunction firewalls displacing in-kind competitors. In general, vendors that have traditionally focused on smaller businesses for their core business, and have a strong foothold there (such as Fortinet, SonicWall, and WatchGuard), are trying to move upstream. This is why they usually name Cisco or Juniper as their main competitors. Vendors looking to establish a greater presence in the lower-midmarket space consider SonicWall and Fortinet to be their strongest competitors. Multifunction firewall specialists Fortinet and SonicWall were the most-named top competitors, followed by traditional firewall vendors Cisco and Juniper.

Large enterprise firewall vendors have a slow success rate in this market because they're unable to adapt their business models and products to the smaller horizontal market, with features such as a management console, which can be used effectively by nonexpert users; a full range of features in a single appliance; licensing for subscription-based, add-on security technologies that don't require frequent payment increases; and a support offering that's affordable and doesn't treat SMBs like a less-desirable class of customer. As part of our client interviews, we found that some SMBs were using products that didn't give them the option to add on a protection they needed. These SMBs were left with the two undesirable choices of purchasing a second appliance or remaining vulnerable. Most chose the latter.

Large-enterprise-focused firewall vendors tend to have two lines of products, which are separated between serving the small business and the midsize business. Most SMB-focused vendors have a single line of products, but don't have competitive, large-enterprise products. Most shortlists are made up of vendors from one of these groups, but rarely both.

SMB multifunction firewall vendors, which are moving upmarket from a pure SMB focus, are introducing more single-function appliances into the market to appeal to upper-midsize businesses and smaller enterprises that may want a separate Secure Sockets Layer (SSL) VPN or e-mail security appliance outside the all-in-one box. Although it may make sense for incumbent SMB multifunction vendors to "break apart" their boxes to move up the customer-size spectrum, they risk losing focus on their customer base while chasing customers that are already pursued by leading, single-function incumbents.

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Gartner's survey of vendors determined that dollars per Mbps of firewall throughput varied greatly, ranging from less than $2 to $14. This range has lowered from the 2008 survey (when it was from $4 to $15), and is a function of this market's increasing maturity and of hardware's increasing performance. Some vendors assessed developed, full IPv6 support in 2008, and several others have it on their road maps for 2009 and 2010. In addition, some vendors are responding to customers that want Web application firewalling capabilities in their platforms, either with a product that's in production today or on a near-term road map.

This market will continue to grow, driven by the requirement to add new technologies to counter new threats, and by the need for growing SMBs to replace appliances with those that have more capacity. Small and lower-midsize companies will continue to use the single multifunction appliance, although they may choose a mix of multifunction firewall features and in-the-cloud anti-spam. Upper-midsize businesses will be candidates for stand-alone, best-of-breed appliances as they grow into enterprise-size and enterprise IT. The enterprise vendors will continue to struggle for market share, and won't fully succeed unless they directly address SMB requirements across their businesses, and unless they offer more than downsized enterprise equipment with highly complex pricing schemes and overly complicated management.

Inclusion and Exclusion Criteria

Inclusion Criteria

SMB multifunction firewall companies that met the market definition/description were considered for this Magic Quadrant under the following conditions:

- They shipped multifunction network firewall software and/or hardware products — targeted to SMBs — that included capabilities in the following feature areas:

    - Network security

    - Web security

    - E-mail security

- They regularly appeared on SMB shortlists for final selection.

- They achieved SMB multifunction firewall product sales (not including maintenance and so forth) of more than $5 million during the past year, and within a customer segment that's visible to Gartner. They also achieved this revenue on the basis of product sales, exclusive of managed security service (MSS) revenue.

Exclusion Criteria

- There was insufficient information for assessment, and the company didn't otherwise meet the inclusion criteria, or isn't yet actively shipping products.

- Products aren't usually deployed as the primary, Internet-facing firewall (for example, proxy servers and network IPSs).

- Products are built around personal firewalls, host-based firewalls, host-based IPSs, and Web application firewalls — all of which are distinct markets.

- Solutions are typically delivered as MSSs, to the extent that product sales didn't reach the $5 million product sale threshold.

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O2Security and eSoft were evaluated, but didn't meet the inclusion requirements for this Magic Quadrant. Gartner will continue to monitor their progress closely.

As pure, multifunction firewall MSS vendors, Untangle and Network Box USA were assessed, but not included in this Magic Quadrant.

Added

This is a new Magic Quadrant.

Dropped

This is a new Magic Quadrant.

Evaluation Criteria

Ability to Execute

Product/Service: This also includes customer satisfaction in deployments, and considers factors related to getting products sold, installed, supported, and in users' hands. Strong execution means that a company has demonstrated to Gartner that its products are successfully and continuously deployed in SMBs, and win a large percentage in competition with other vendors. Companies that execute strongly generate pervasive awareness and loyalty among Gartner clients, and generate a steady stream of inquiries to Gartner. Execution isn't primarily about company size or market share, although those factors can affect a company's ability to execute. Sales are a factor; however, winning in competitive environments through innovation, quality of product, and ease of use is foremost over revenue. Key features such as virtualization, console quality, low latency, range of models, secondary product capabilities (such as logging, event management, and compliance), and the ability to support multifunction deployments are weighted heavily.

Overall Viability: This includes overall financial health, prospects for continuing operations, company history, and demonstrated commitment to the multifunction firewall and network security market. Growth of the customer base and revenue derived from sales are also considered. All vendors are required to disclose comparable market data, such as multifunction firewall revenue, competitive wins vs. key competitors (which is compared with Gartner data on such competitions held by our clients), and devices in deployment. The number of multifunction firewalls shipped isn't a key measure of execution. Instead, we consider the use of these firewalls and the features deployed to protect the key business systems of Gartner SMB clients.

Sales Execution/Pricing: This includes pricing, number of deals, the installed base — and the strength of sales and distribution operations in the vendors. Pre- and post-sales support is evaluated. Pricing is compared in terms of a typical SMB-class deployment, including the cost of all hardware, support, maintenance, and installation. Low pricing won't guarantee high execution or client interest. Buyers want value more than they want bargains, although low price is often a factor in building shortlists. The total cost of ownership (TCO) during a typical multifunction firewall life cycle (which is three to five years) is assessed, as is the pricing model for adding security safeguards. In addition, the cost of refreshing the products is evaluated, as is the cost of replacing a competing product without intolerable costs or interruptions.

Market Responsiveness and Track Record: This includes the ability to respond, change direction, be flexible, and achieve competitive success as opportunities develop, competitors act, customer needs evolve, and market dynamics change. This criterion also considers the provider's history of responsiveness.

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Marketing Execution: This addresses awareness of the product in the market. We recognize companies that are consistently identified by our clients and often appear on their preliminary shortlists.

Customer Experience and Operations: These include management experience and track record, and the depth of staff experience — specifically in the security marketplace. The greatest factor in this category is customer satisfaction throughout the sales and product life cycle. Also important is ease of use, overall throughput across different deployment scenarios, and how the firewall fares under attack conditions.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	High
Overall Viability (Business Unit, Financial, Strategy, Organization)	Standard
Sales Execution/Pricing	Standard
Market Responsiveness and Track Record	Standard
Marketing Execution	Low
Customer Experience	Standard
Operations	Standard

Source: Gartner (June 2009)

Completeness of Vision

Market Understanding and Marketing Strategy: These include providing a track record of delivering on innovation that precedes customer demand, rather than an "us too" road map and an overall understanding and commitment to the security market (specifically the network security market). Gartner makes this assessment subjectively by several means, including interaction with vendors in briefings and feedback from Gartner clients on information they receive concerning road maps. Incumbent vendor market performance is reviewed yearly against specific recommendations that have been made to each vendor, and against future trends identified in Gartner research. Vendors can't merely state an aggressive future goal. They must enact a plan, show that they're following it, and modify the plan as they forecast how market directions will change.

Sales Strategy: This includes pre- and post-product support, value for pricing, and clear explanations and recommendations for detection events and deployment efficacy. Building loyalty through credibility with a full-time SMB security and research staff demonstrates the ability to assess the next generation of requirements.

Offering (Product) Strategy: The emphasis is on the vendor's product road map, current features, "leading edge" capabilities, virtualization, and performance. The quality of the security research labs behind the security features is considered. Credible, independent third-party certifications, such as Common Criteria, are included. Integrating with other security components is also weighted, as well as product integration with other IT systems. As threats change and become more targeted and complex, we weight vendors highly if they have road maps with the ability to move beyond purely signature-based, deep-packet inspection techniques. In addition, we weight vendors that are looking to add cloud-based services into their offerings.

Business Model: This includes the process and success rate of developing new features and innovation, and R&D spending.

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Innovation: This includes product innovation, such as R&D, and quality differentiators, such as performance, virtualization, integration with other security products, a management interface, and clarity of reporting.

Geographic Strategy: This includes the ability and commitment to service geographies.

The more a product mirrors the workflow of the SMB operation scenario, the better the vision. Products that aren't intuitive in deployment, or operations that are difficult to configure or have limited reporting, are scored accordingly. Solving customer problems is a key element of this category. Reducing the rule base, offering interproduct support, and leading competitors on features are foremost.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	Standard
Sales Strategy	Standard
Offering (Product) Strategy	Standard
Business Model	Standard
Vertical/Industry Strategy	No rating
Innovation	Standard
Geographic Strategy	Low

Source: Gartner (June 2009)

Leaders

The Leaders quadrant contains vendors at the forefront of making and selling multifunction firewall products that are built for SMB requirements. The requirements necessary for leadership include a wide range of models to cover SMB use cases, support for multiple features, and a management and reporting capability that's designed for ease of use. Vendors in this quadrant lead the market in offering new safeguarding features, and in enabling customers to deploy them inexpensively without crippling network performance. These vendors also have a good track record of avoiding vulnerabilities in their security products. Common characteristics include reliability, consistent throughput, and a product that's intuitive to manage and administer.

Challengers

The Challengers quadrant contains vendors that have achieved a sound customer base, but they aren't leading with features. Many challengers have other successful security products in the SMB world, and are counting on the client relationship, rather than the product, to win deals. Challenger products are often well-priced, and, because of their strength in execution, these vendors can offer economic security product bundles that others can't. Many challengers hold themselves back from becoming leaders because they're obligated to set security or firewall products as a lower priority in their overall product sets.

Visionaries

Visionaries have the right designs and features for the SMB, but they lack the sales base, strategy, or financial means to compete globally with leaders and challengers. Most visionaries' products have good security capabilities, but lack the performance capability and support

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network. Savings and high-touch support can be achieved for organizations that are willing to update products more frequently and switch vendors, if required. Where security technology is a competitive element for an enterprise, visionaries are good shortlist candidates.

Niche Players

Most vendors in the Niche Players quadrant are enterprise-centric in their approach to multifunction firewalls for SMBs. However, some niche companies are making their enterprise products smaller, mistakenly hoping that this will satisfy SMBs. If midsize companies are already clients of these vendors for other products, then niche players can be shortlisted.

Vendor Strengths and Cautions

Astaro

Astaro offers a range of Intel-based appliances for SMBs. In addition, Astaro provides software for customer hardware and a separate virtual appliance.

The base price includes the appliance, firewall, IPS, and VPN, with third-party Web and e-mail security feature packages available via subscription. Astaro integrates out-of-the-box with Active Directory and Novell eDirectory. In addition, Astaro offers a full HTTPS scan.

Strengths

- Astaro's decision to support Cisco's IPsec clients has helped customers switch more easily from Cisco Private Internet eXchange (PIX) firewalls to Astaro.

- Astaro has good networking capabilities. Its WAN Link Balancing can balance up to eight connections. Users like Astaro's clustering features and price, and its ease of installation is reportedly good.

- Astaro continues to provide differentiated VoIP security. The device understands the Session Initiation Protocol (SIP)/H.323 control connection, parses the control data, and automatically opens ports for the voice and video connections.

- Astaro was early to market with a virtualized appliance and HTTPS inspection.

Cautions

- Astaro has limited visibility outside of Europe, the Middle East and Africa (EMEA), but its recent efforts focusing on Latin America show promise.

- Users describe Astaro's reporting and alerting as difficult to use.

- Users report some trouble with IPS false positives, and some difficulty in tuning the IPS.

Check Point Software Technologies

Check Point Software Technologies is an established brand in network security with four product lines for the SMB: UTM-1, software versions for installation on general-purpose servers using the SecurePlatform (SPLAT) environment, Safe@Office/SofaWare Technologies, and appliances from OEMs.

Check Point declined to provide any information or reference customers for this Magic Quadrant, which generally indicates that a company doesn't focus on a particular market.

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Strengths

- Check Point has a VMware-certified version of its firewall.

- The SmartCenter console is good for managing multiple firewalls and/or complex rule sets, such as in larger midsize companies and B2B deployments.

- Customers like the flexibility and robustness of the firewall and VPN features.

- Check Point provides the assurance of a known security brand with a low rate of vulnerabilities.

Cautions

- The Safe@Office and UTM-1 appliance ranges intersect among SMBs. This favors midsize companies growing into enterprise-class products, but doesn't favor a smooth transition for small businesses.

- As an enterprise-focused company, the Check Point channel and support aren't targeted at the SMB.

- Gartner clients report that Check Point's IPS signature quality is low.

- Gartner rarely sees Check Point on SMB customer shortlists.

Cisco

Cisco firewall products for the SMB are in three product lines: Cisco Small Business, formerly Linksys Business Series (the RV product line); IOS firewall (including the Integrated Services Routers — ISR); and the Cisco Adaptive Security Appliances (ASA).

The Cisco IOS firewall offerings appeal to SMBs that don't wish to deploy a stand-alone security appliance, or those that desire a subset of the all-in-one safeguards. Cisco has considerable brand recognition and footprint within SMBs for its infrastructure products, but these aren't viewed as a significant competitive threat by SMB appliance vendors; consequently, Cisco was listed by surveyed SMB appliance vendors as the vendor they most replace. However, Gartner believes this is likely within the context of replacing in-the-router solutions rather than security appliances.

Strengths

- Cisco recently put resources into developing console interfaces specifically for SMBs in an attempt to improve the user experience.

- Cisco has global support and sales coverage.

- Its infrastructure equipment market share in SMBs means that Cisco is often added to first-time multifunction firewall shortlists.

Cautions

- The RV Series and ASA appliance ranges intersect among SMBs. This favors midsize companies that are growing into enterprise-class products, but doesn't favor a smooth transition for small businesses. There's no single console across the RV Series and ASA/ISR model lines, and some Linksys information appears on the Cisco Small Business site, but not on the Linksys by Cisco site.

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- Like most enterprise-focused vendors, Cisco doesn't have strong channels or product offerings for smaller businesses for its primary security products.

- Cisco's pricing for SMB multifunction security is consistently higher than its competitors'.

Clavister

Sweden-based Clavister produces the Clavister Security Gateway, which includes all typical multifunction firewall safeguards, as well as some traffic-shaping features. It's delivered as an appliance, as a software-only version, or as a virtual gateway. In addition, Clavister gains significant revenue as an OEM provider for partners, such as D-Link. Clavister partners with Kaspersky for anti-spyware and antivirus capabilities, ContentKeeper Technologies for URL filtering, and multiple vendors for anti-spam.

Strengths

- Customers cite Clavister's small footprint, and its intuitive central management system with easy change rollback.

- Clavister has a strong, early-to-market virtual platform.

- A number of good distribution partners provide Clavister with a nice business foundation.

Cautions

- Although management is strong, users cite quality of reporting as a deficiency.

- Clavister derives a large percentage of its revenue from Western Europe. It plans to expand its geographical coverage, but must do so without hurting its core customers.

Cyberoam

With the majority of its installed base in India, Cyberoam has a full suite of security technologies: firewall, VPN, IPS, and anti-X. The company differentiates on identity-based network access, which provides access control that links IP addresses with directory identity (such as Active Directory), and bandwidth management, which is of interest in developing regions where Internet connectivity is expensive or in short supply. In 2008, Cyberoam added a small office/home office appliance along with five new models. Cyberoam has 11 appliance models in the CRi series for SMBs.

Strengths

- Identity-based access and the ability to create and add granular user-based Web filtering are still unique in the SMB multifunction firewall world, and are primary reasons that customers list for implementing Cyberoam.

- Cyberoam has a strong presence in Asia, and, in 2008, saw significant growth in EMEA.

- Cyberoam is fast to market with new features.

- Outside Asia/Pacific, Cyberoam has had some success with healthcare and education customers.

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Cautions

- Identity-oriented customers say that "identity" too often defaults to the IP address rather than the true user identity.

- Cyberoam is still more a "regional" player than a global player.

- Cyberoam is rarely seen on competitive shortlists, and rivals don't mention it as a "top competitor."

Fortinet

Fortinet is well-established as an SMB multifunction firewall maker with a wide model range. All Fortinet security technologies are developed in-house — it doesn't resell products from others — and Fortinet has its own antivirus, URL, and IPS signature research teams. Fortinet offers 20 multifunction firewall models, many of which are suitable for SMB deployments. The FortiOS 4.0 release includes WAN optimization, application control, data leakage prevention, and SSL inspection.

Strengths

- Fortinet shows competitive strength — it was the most-named "top competitor" in our vendor survey, and Gartner frequently sees it on SMB customer shortlists.

- Fortinet has good performance from purpose-built hardware and a wide model range within SMBs. In addition, Fortinet is better-suited for upper-midsize deployments than many of its competitors are.

- Customers generally like the firewalling and security features in Fortinet platforms. Customers also like the URL filtering.

- In SMB environments, ease of deployment continues to differentiate Fortinet from legacy firewall vendors.

Cautions

- Users report a high rate of false positives and other issues with the IPS.

- Post-sales service and support received uneven ratings from users, although they note that there has been some improvement in recent months.

- Midsize users with multiple unit deployments dislike separate stock-keeping units for FortiManager and FortiAnalyzer.

IBM Internet Security Systems

Long a leading purveyor of enterprise IPS, IBM ISS offers its SMB all-in-one firewall, the Proventia Network Multi-Function Security (MFS) product, which is available in seven models. During the past year, IBM has refined its go-to-market strategy with MFS to align it more with SMB market needs. IBM has lowered prices on some models to bring them more in line with competing products. IBM's latest 2009 release includes a Web application firewall.

Strengths

- IBM has a strong enterprise security legacy powered by the X-Force Threat Analysis Service. The company also has strong network IPS capabilities.

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- Customers report that ease of administration and strength of reporting are greatly improved, and are now positive differentiators.

- IBM Express Advantage has gained some SMB customers by offering an IBM-managed solution to minimize the complexity and strain on overburdened SMB IT staffs.

Cautions

- Users report occasional problems with SSL VPN sessions dropping off.

- Users report that some partners are unable to answer basic support questions.

- Gartner sees very few SMB multifunction firewall shortlists with IBM on them, and competitors don't consider IBM to be a significant competitive threat. IBM has difficulty reaching SMBs through its channels.

Juniper Networks

Juniper has five firewall lines, with the Secure Services Gateway (SSG) and SRX (this new line includes routing and the JUNOS operating system) being of interest to SMBs. The Juniper Network and Security Manager (NSM) is a single management interface across all the products. Juniper targets its products toward enterprises and enterprise branch offices, so it didn't participate in the "MarketScope for Multifunction Firewalls for Small and Midsize Businesses." For this Magic Quadrant, we're including Juniper because of its significant presence in SMB networks and on shortlists.

Strengths

- Customers consistently cite low cost and ease of installation, including VPN configuration, as their reasons for selection.

- Juniper's management features are well-placed in selections in which there are multiple devices, or in larger midsize deployments.

Cautions

- Juniper is focused on serving the enterprise rather than the SMB. Despite this, however, Juniper SSG has good SMB presence.

- Gartner rarely sees Juniper SSG on non-Juniper networking customer shortlists.

- Juniper is moving away from the ScreenOS operating system toward JUNOS on all its firewall platforms. If the model you're considering doesn't have JUNOS or is listed as not being convertible to JUNOS, then consider another model; don't plan to extend this product beyond the normal firewall life span of four to five years, or gain a favorable trade-up guarantee from Juniper to assist in upgrading for the long term.

McAfee

McAfee recently acquired Secure Computing (see "Secure Computing Buy Will Strengthen McAfee Network Security"), which served SMBs with its small business SnapGear models and midsize enterprises with the lower end of the Sidewinder line (SnapGear and Sidewinder have renamed the McAfee UTM Firewall and the McAfee Firewall Enterprise, respectively). Both products are well-suited for B2B implementations, and most customers that Gartner sees have multiple devices.

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Strengths

- Well-suited for midsize branch office and B2B.

- The McAfee UTM Firewall's use of open-source components, such as Clam AntiVirus (AV), keeps the price for updates or adding products low.

- Customers often cite that the McAfee UTM Firewall team is very responsive to support requests, and that the staff is very accessible.

- The optional TrustedSource feature, which can block connections from known hostile sites at the firewall, is valuable for reducing malware without having to burden inspection engines.

Cautions

- The former Secure Computing's product visibility within SMBs is very low. Under McAfee, Gartner expects this to continue because McAfee has been primarily focused on consumer and enterprise network security.

- Enabling multiple service set identifiers (SSIDs) is difficult in wireless-enabled versions.

- Users report that some of the McAfee UTM Firewall's security features, such as Clam AV, have mixed effectiveness; however, Gartner expects that McAfee anti-malware products will replace the current third-party protections at some point.

- The UTM Firewall and Firewall Enterprise appliance ranges intersect among SMBs. This favors midsize companies growing into enterprise-class products, but doesn't favor a smooth transition for small businesses. There's no single console across the two model lines.

NetASQ

NetASQ provides a mix of advanced network security features to drive network performance, and also provides embedded OEM solutions, such as anti-malware from Kaspersky, and URL filtering and anti-phishing from Optenet. NetASQ's platform and operating system are proprietary, and intrusion prevention is conducted at the kernel (driver) level. Four of NetASQ's new U-Series models, which are marketed to SMBs as providing greater throughput than competitive products, and at a lower TCO, have six or more gigabit interfaces. NetASQ's pricing model is all-in-one (no fees for add-on modules), with all signature update fees included in the maintenance fee. NetASQ is placed in the Visionaries quadrant because of its strong appeal to midsize customers, for whom strong networking features are important.

Strengths

- Users appreciate NetASQ's all-in-one pricing model.

- Partners stress that NetASQ provides good channel marketing, training, and sales support.

- Users report that the appliance throughput lives up to performance claims, including when the IPS is enabled.

- VoIP security is conducted with automatic protocol inspection (NetASQ upgraded VoIP protections during the past year).

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Cautions

- NetASQ has a narrow international base, with a great majority of its deployments in EMEA, and a significant number of those in France.

- NetASQ doesn't emphasize IPS signatures, which some buyers use as a point of comparison. Explaining how protocol analysis and contextual signatures provide protection without touting traditional IPS signatures as a valid, alternative approach is difficult when speaking to SMBs.

SonicWall

SonicWall, a longtime firewall vendor, offers three classes of products for multifunction firewall customers: TZ for smaller customers; Network Security Appliance (NSA) for lower-midsize-midsize customers; and NSA E-Class for upper-midsize-small enterprises. In addition to its own URL filtering service, SonicWall provides support for Websense URL filtering, but otherwise uses in-house technology for its multifunction firewall. SonicWall's latest version has HTTPS inspection and application control.

Strengths

- SonicWall is showing competitive strength — it was the second most-named "top competitor" in our vendor survey, and Gartner sees it frequently on client shortlists.

- The company has the reputation and track record of strong channel support.

- SonicWall provides very good performance value at a low dollars-per-Mbps rate.

- Users report that management and firewalling features are intuitive.

Cautions

- E-Class remains a SonicWall focus, especially after the Aventail acquisition, so the possibility remains that SMBs will lose SonicWall's attention. In 2008, SMB multifunction firewall revenue was down slightly from 2007, year over year.

- SonicWall must work to overcome its image as a low-end, commoditized platform; Gartner frequently speaks with midsize customers that have "outgrown" their SonicWall products.

WatchGuard

U.S.-based WatchGuard's Firebox X e-Series line of all-in-one firewalls for the SMB is split into three sublines: Edge, Core, and Peak serve small, lower-midsize, and upper-midsize businesses, respectively. WatchGuard uses a standard appliance platform so that some upgrades can be conducted without an appliance replacement. WatchGuard is well along in the process of what is, effectively, an overhaul and change of most aspects of the company. WatchGuard has announced, but not yet released, the Fireware XTM operating system, which will add to the e-Series models' features, such as HTTPS application inspection, clustering, and enhanced VoIP security.

Strengths

- Clients report that they like how easy it is to update the product, and that they like the management interface.

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- WatchGuard often scores well in low-price selections, and it's been steadily increasing in visibility on Gartner SMB clients' shortlists.

Cautions

- Unlike competitors that charge a single fee, WatchGuard offers separate pricing for adding URL filtering, anti-spam, and gateway antivirus and IPS.

- There are too many WatchGuard product categories, names, upgrade options, and unclear terminology in branding. This makes it difficult for WatchGuard to get onto shortlists easily, because buyers must struggle to determine which product is appropriate and what features are included.

RECOMMENDED READING

"Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market"

"Magic Quadrant for Enterprise Network Firewalls"

"MarketScope for Multifunction Firewalls for Small and Midsize Businesses"

"Secure Computing Buy Will Strengthen McAfee Network Security"

Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next doesn't necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability (Business Unit, Financial, Strategy, Organization): Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all pre-sales activities and the structure that supports them. This includes deal management, pricing and negotiation, pre-sales support and the overall effectiveness of the sales channel.

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Market Responsiveness and Track Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word-of-mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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REGIONAL HEADQUARTERS

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

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

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

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

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

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