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in association with symantec.

Security

3Com

While 3Com is not completely out of the woods yet – it still has to finish its financial turnaround – in the 18 months since it got into the security arena with the acquisition of TippingPoint Technologies, the company has managed to pull off double-digit sequential revenue growth in recent quarters. 3Com has also cemented its position as the revenue leader in the intrusion prevention systems category that TippingPoint helped pioneer, according to figures from Infonetics Research published earlier this year.

In terms of its broader impact on the security landscape, the company last year launched its Zero Day Initiative. Under ZDI, the company pays hackers to find vulnerabilities in commercial software. While the initiative has paid for only a little over a dozen published vulnerabilities since launch, those it has publicised have been in unexpected and broadly deployed applications, including storage management software, a potential gold-mine of data for attackers.

Check Point Software Technologies

Companies may always propound their theories about whether enterprises are broadly more in favour of end-to-end software suites or point product pick-n-mixes, but regardless of which notion you subscribe to, it is difficult to argue that simplified management of all the diverse security countermeasures required nowadays is not important. Recognising this, Check Point earlier this year proudly announced that it has completed the process of tying together all its products – those mitigating risk at the perimeter, web server, internal network and host – under a single management console.

The company's financial performance very recently has not been impressive, and the abandonment of the Sourcefire acquisition deal, which would have given the company an extremely strong position in the intrusion prevention market, is surely a blow to Check Point's plans. However, the company remains the firewall/VPN market leader according to many research firms, as well as holding top-five position in related security markets.

Cisco Systems

Cisco has long led the network security hardware market, thanks largely to its firewalls, and has long expounded its vision of an Internet that has more functionality often found at the edges deployed in the network infrastructure instead. Security is a core part of that vision.

The company's two year-old Network Admission Control strategy, which promises to protect the network by ensuring policy compliance at the endpoints, has been mimicked by almost every company in the security industry, large and small. Cisco has also brought in unified management tools that enable administrators to take stock of their Cisco security deployments from a single console, and has aligned with other major security players to bring 'anti-x' security technologies to its own platforms.

Fortinet

Fortinet is a rare beast, a private security company barely into its sixth year that is already the category leader in a rapidly growing market, where it competes against companies much better known than itself. The firm estimates it has shipped about 125,000 units of its unified threat management appliance since its 2002 launch, and says it made over $100m in revenue last year. It claimed 18% of the UTM space in 2004, the most recent full year for which IDC figures are available, and is said to continue to lead the high-end UTM appliance market in terms of shipped units. Virtually every company that sells a firewall now also sells a UTM device, a testament to Fortinet's ability to very early identify a market where there is real demand.

McAfee

Having spent a couple of years shucking off non-core businesses and reinventing itself, McAfee is not only showing headway in the intrusion prevention space it has claimed as its firm focus, but has also shown that the antivirus market is not dead.

The firm busted through the $1bn annual revenue mark again last year, and is adding customers all over the world due to broad partnerships with big ISPs and wireless operators that reach millions of end users. With over a billion dollars in the bank, the

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FORTINET

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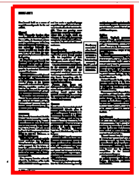

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firm has set itself on a course of acquisition and growth for the rest of 2006.

Microsoft

While Microsoft's OneCare client security suite has been in the pipeline for a while, its imminent release could impact the space in the long term, not necessarily through superior technology (although that cannot be ruled out, despite what many people say about the company's security track record) but due to its pricing.

Its $50 price tag may be only $20 less than its major competitors, but the two additional seats it offers on its basic licence mean it could prove popular in networked homes and very small businesses.

The releases of Internet Explorer 7 and Windows Vista will do still more to buffer Microsoft's reputation as a security player, as the browser deepens its embrace of security certificates, reputation services and fraud mitigation, and the operating system will be somewhat more hardened against malicious code attacks.

The company has also expanded its range of enterprise security products, mainly to buffer its much-maligned Exchange email servers, through a series of small acquisitions, including Sybari and FrontBridge.

RSA Security

RSA Security is convinced that the Internet's ever-worsening security profile, accompanied by increased user awareness and vertical industry regulations, is set to drive demand for the two-factor authentication products that the company has been selling to high-end customers, as market leader, for years.

While RSA had a setback with the recent revelation that Windows Vista, due to delays, will not feature native support for its tokens at launch, it has been inking deals left and right to get its technology into as many software and hardware products as possible.

The company has also acknowledged the limitations of its traditional hardware-based approaches, and has made a couple of recent acquisitions to get its hands on software-based authentication technologies. These are proving more appealing to consumer-facing businesses such as banks, which are reluctant to deal with the cost and complexity of putting SecurID hardware into the hands of millions of customers.

Secure Computing

Secure Computing consolidated the application proxy firewall market with the acquisition of rival Cyberguard, worth almost $300m when it was announced last August.

The deal created one of the leaders in the emergent unified threat management market, and the companies' combined secure content management divisions saw the new Secure Computing, with 21 million seats, snap at the heels of market leader Websense.

Between them, Secure and Cyberguard held the distinction of never having a CERT vulnerability advisory issued against their firewalls, a fact that continues to help the company sell well into governmental agency accounts.

Symantec

Symantec may have created a giant of infrastructure software when it acquired Veritas last year, but it is still showing signs that it is able to innovate at a reasonable clip. Where it has not been able to develop in-house fast enough, it has made select acquisitions, padding out its security portfolio by buying companies including BindView, IMLogic, Sygate and WholeSecurity over the last year.

As the largest security company, Symantec has made broad efforts to leverage its unique insight into the security posture of the Internet as a whole, rolling out a series of commercial and semi-commercial information services that promise to bring chief security officers a more vivid picture of the threat environment in which they operate.

The company also has plans to dip into the Web 2.0 economy, recently positing for possible entries into the search security space. Symantec was poised to reveal more of its strategy as *CBR* went to press.

> Virtually every company that sells a firewall now also sells a UTM device, a testament to Fortinet's ability to very early identify a market where there is real demand.

VeriSign

Although VeriSign's corporate strategy is broad – including many categories not at first glance synergistic – the company has executed some shrewd deals that may see it gaining ground in a couple of key growth markets.

Selling off its payments processing business to eBay came as a bit of a shock last autumn, but it gave the company a nice cash injection and a commitment from the ecommerce giant to put VeriSign authentication tokens in the hands of a million buyers and sellers within three years, as part of the new VeriSign Identity Protection network.

That could provide VeriSign with a much-needed leg-up in the two-factor authentication space, where it is challenging incumbent market leader RSA Security.

The move was backed up with the acquisition of SnapCentric, which will help VeriSign sell fraud mitigation services to the banking sector. Separately, the company also beefed up its vulnerability management and managed security services portfolio with the acquisition of iDefense last summer.

Best of the rest

Qualys may have lost its top security thinker and most prolific speaker to a rival company earlier this year, but arguably its Software-as-a-Service approach to vulnerability management has reached the point where it requires fewer cheerleaders.

Honorable mentions this year go to Citrix for its speedy entry into the SSL VPN space, Trend Micro for its innovation in the anti-malware space, and SonicWall for executing better than its primary competition in the low-end perimeter security space.

Companies worth keeping an eye on include Postini, MessageLabs, Sophos, CipherTrust, Mirapoint, and PatchLink.

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