



Emergence of Application Firewalls

by Bill Trussell, Managing Director of Information Security

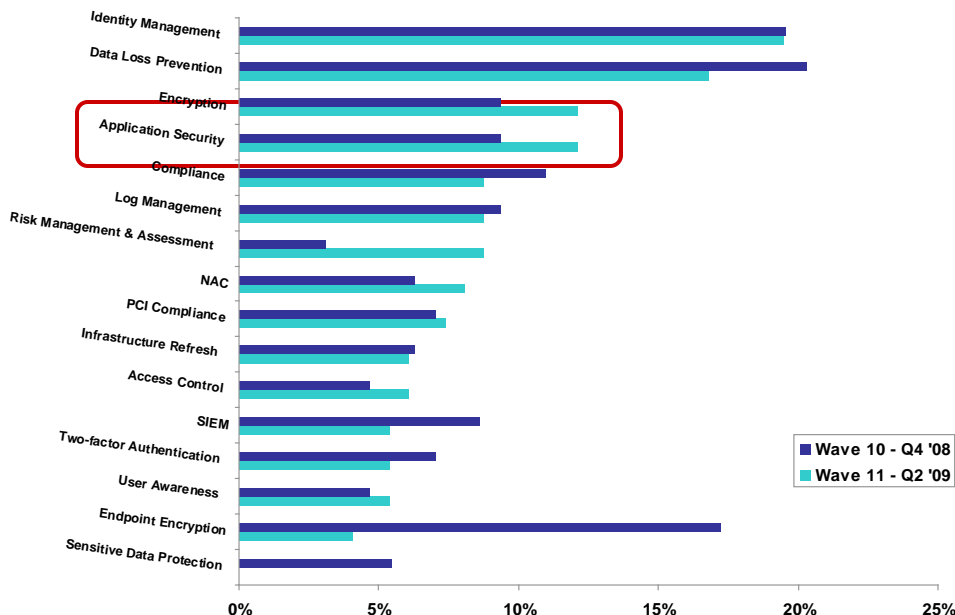
TIP Position

In the most recent Information Security Study results, application security projects were frequently cited by larger enterprises, increasing 30% in numbers from results published just six months earlier. Considerable time and effort has been put into protecting the enterprise network perimeter in recent years, but now additional protection for application vulnerabilities is necessary. To aid in this effort, participants in the security study have told TIP that implementation of application firewalls is a top initiative. Not only that, they have indicated that future growth in the use of this solution is among the strongest in the study. Key indicators from the Wave 11 Information Security Study were as follows:

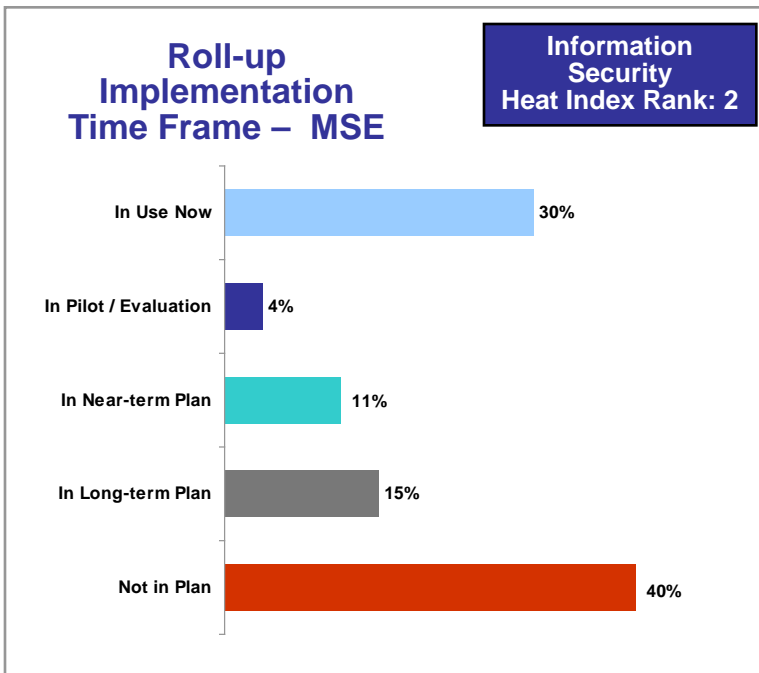
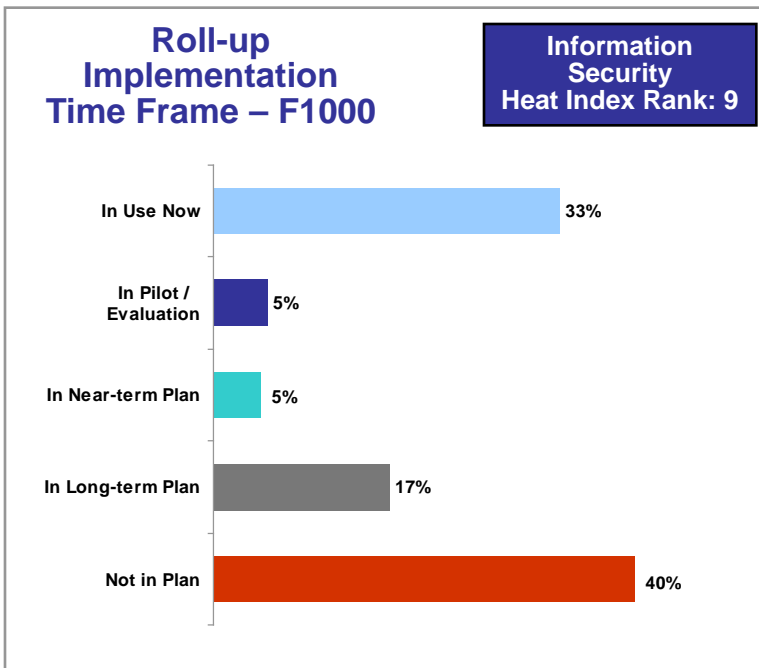
- Among F1000 organizations, only one-third have already implemented application firewalls in their organizations. An additional 27% cited plans for implementation in the near or long term. This future adoption strength, along with strong spending support, resulted in these solutions ranking ninth on the Heat Index of information security solutions among F1000 organizations.
- A very similar adoption pattern exists among midsize enterprises (MSEs), with 30% of respondents citing having application firewalls *in use* as of Wave 11. Another 30% cite having future plans for adoption within the next four quarters after Wave 11 interviews.
- Among MSE organizations, outward statements of technology adoption and spending plans supporting these programs resulted in a Heat Index position second to event log management solutions.
- Competition among providers of application firewalls varies by enterprise market, with F5 Networks appearing among the leaders of *in plan* citations in both F1000 and MSE organizations, while upstart Palo Alto Networks is cited more frequently as a vendor *in consideration* among MSE organizations.

Continuing concern about the protection of sensitive data maintained within enterprise IT resources along with compliance requirements related to such protection will keep the market for application firewalls hot for the foreseeable future.

Top Information Security Projects (F1000)



F1000 and MSE Use of Application Firewalls



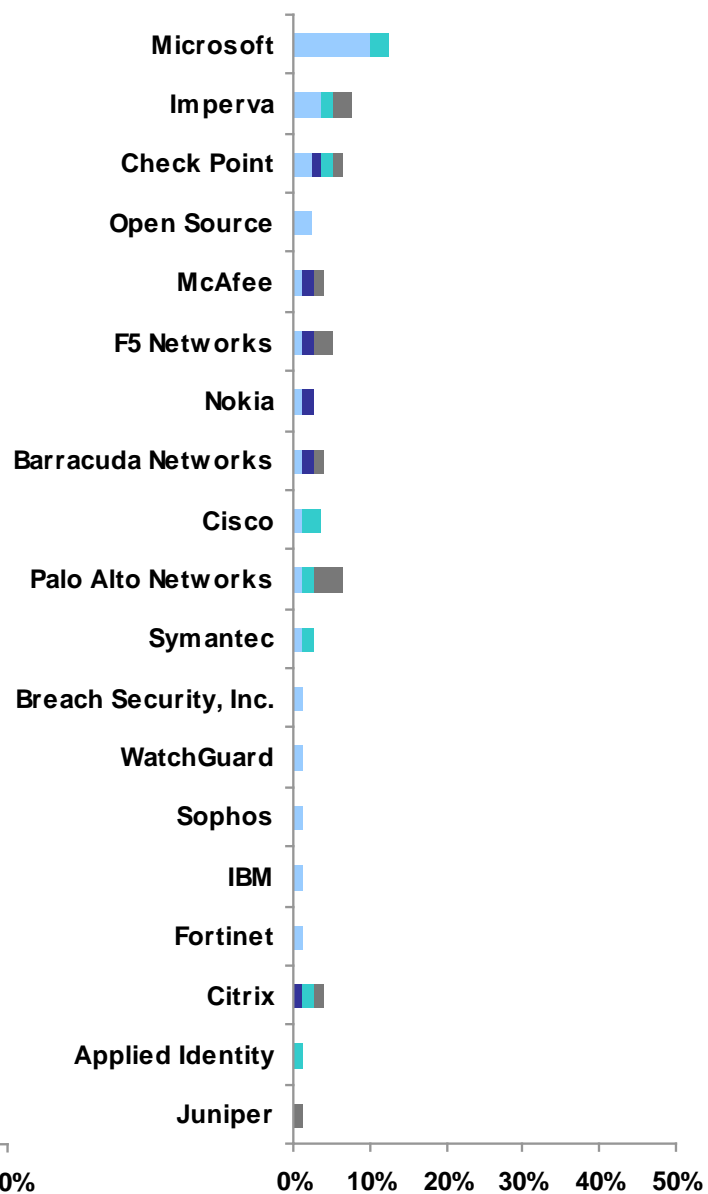
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Application Firewall Competitive Landscape

F1000 Vendor Landscape



MSE Vendor Landscape



■ In Use Now
 ■ In Pilot/Evaluation
 ■ In Near-term Plan (Through End Q3 '09)
 ■ In Long-term Plan (Q4 '09 to Q2 '10)

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Methodology and Sample Sizes

Results are based on 246 comprehensive interviews with information security professionals at Fortune 1000 and midsize enterprises between February and May 2009.

- Page 1:** F1000 Sample. Wave 10 n=128, Wave 11 n=149. *Note that due to multiple responses per interview, total may exceed 100%
- Page 2:** Top Chart: F1000 Sample. n=154 Bottom Chart: MSE Sample. n=80
- Page 3:** Left Chart: F1000 Sample. n=154. Right Chart: MSE Sample. n=80.

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