

Network Access Control Report Prospectus

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Internet Research Group provides marketing and strategy research reports and consulting services, specializing in areas related to Internet infrastructure. IRG offerings combine the formidable and unique experience and perspective of the two principals: John Katsaros and Peter Christy. At IRG, John and Peter produce definitive, early studies of the emerging markets in Internet infrastructure. Their clients for this work included most of the participants in the markets.

Table of Contents

I.	Introduction.....	1
II.	Market Overview	1
III.	Report Objectives.....	2
IV.	Report Table of Contents	3

I. Introduction

In 2005 the topic of “end point security” became a hot part of the security marketplace. This report examines the complex and confusing topic starting with analysis of customer needs and then examining the available and future solution elements. This is a deliciously complex task in all dimensions, a clearly important area but one with no simple solution nor even a simple way of identifying the problems being solved. Understanding the spectrum of the issues is important for all vendors trying to do business in some aspect of this market.

Today’s network-delivered applications are more valuable to the enterprise than earlier enterprise applications because they play an increasingly important role in key business processes. These applications have many more users than their predecessors, and most of those users are outside of the headquarters. The user population is no longer select headquarters employees, but rather a much broader collection of employees, contractors, business partners and customers. The network “perimeter” – historically the key place for network security – has greatly diminished value. It’s harder and harder to distinguish between friend and foe; whether you’re at headquarters or elsewhere isn’t by itself a very useful distinction. Whether or not you’re a known user is also of diminishing importance in establishing trust; increasingly threats come from “insiders.” Controlling network access from the inside is every bit as important as external access control and in some cases even more so because of the speed and range of damage that can be inflicted by a LAN-connected computer with an authenticated user.

The corporate network is now much larger than it was in the past, and to some real degree is the entire Internet. Many more employees, contractors, business partners and guests need to connect to enterprise “networks.” More people are on the network more of the time doing more important tasks. At the same time connecting to the network has become more dangerous. This confluence of factors has created the market for end-point security. How can you provide network access to a broad set of individuals while adding more and more valuable assets to the network without causing a train wreck? This report examines that question.

II. Market Overview

End Point Security is an emerging market – there are already between 1,500 to 2,000 customers deploying some form of End Point access control. This report examines the

installed market share. With over twenty vendors in the category, there is a lot of innovation going on. Large players including Cisco (NAC) and Microsoft (NAP) are competing for share of mind. Other large security companies including Symantec and McAfee are making major commitments in this space.

III. Report Objectives

The goal of *The Network Access Control Report* is to answer these vitally important questions:

- What is the market opportunity? What are the pains that customers have today and how to the various technologies and solutions address these problems? What is a rational customer evaluation framework? What is the value proposition?
- What are the major components of End Point security solutions? How will purchase decisions be structure? How do these solutions fit into broader management and security solutions?
- Do what degree can the complete spectrum of end-point security problems be solved today and which necessarily depend on future developments? What are the key future contributions?
- What are the enterprise infrastructure pieces on which these solutions depend?
- What are the key market segments? Who will buy these products and why?
- Who are the participants in this market and how do these new opportunities relate to their existing businesses? How will the market divide up?

IV. Report Table of Contents

1.	Introduction.....	1
2.	Background.....	1
3.	End-Point Security: The Problems.....	2
4.	Solution Components: Restricting Access to the Network	4
5.	Solution Components: End-Point Management.....	9
6.	Solution System Summary.....	10
7.	Sorting this All Out.....	11
8.	Some Bad Ideas	11
9.	A Framework For Customers Choosing a Solution	13
10.	The Unfinished Parts.....	14
11.	Market Share.....	16
12.	Where is the Market Today?.....	18
13.	Advice to Vendors	19