

QUICK TAKE

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Symantec Buys Sygate, Takes Client Security Lead

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EXECUTIVE SUMMARY

Symantec's acquisition of Sygate will accelerate the integration of client security suites beyond antimalware, firewall, and IPS features. Consolidation of client security, configuration management, and network quarantine products will provide better endpoint protection than today's client security products can. Symantec's move will trigger network quarantine purchases by Computer Associates (CA) and McAfee, and an antimalware deal for Check Point.

SYMANTEC AIMS TO BLEND CLIENT SECURITY SUITES WITH NETWORK QUARANTINE

Yesterday, Symantec announced that it will acquire Sygate. Symantec currently has the second-place client security suite.¹ However, with Sygate's best-of-breed personal firewalls and host IPS, plus its early lead in network quarantine rollouts, Symantec becomes the client security vendor to beat.² Here's why:

- **The deal is a win for all customers — including those of Symantec's competitors.** Provided that Symantec's \$13.5 billion absorption of VERITAS doesn't hinder the Sygate integration, users have much to look forward to. Existing Symantec users can add Sygate's network quarantine solution to their arsenals economically, and current Sygate customers can stop worrying about Sygate losing out to a bigger security fish. Finally, competitors' customers can use bids from Symantec-plus-Sygate to extract better pricing during client security refreshes.
- **Despite product overlap, Sygate brings value to Symantec.** Although Symantec has client firewall and server IPS products in its portfolio already, it gains Sygate's network quarantine and security compliance and remediation tools. Symantec will also leverage its LiveState configuration and patch management products to provide an end-to-end client security solution. Symantec will need 12 to 18 months to integrate its various client security products. Today, only 24% of companies use client security suites for their endpoint security, while most use point products.³ Why? Because several components of client security are relatively new — thus, Symantec's integrated product will hit the market just as mainstream customers get serious about integrated client security.
- **Symantec beats CA, Check Point, and McAfee to the punch.** With this acquisition, Symantec will be able to combine the two pieces of client-side security that belong together: 1) proactive protection like endpoint configuration compliance and HIPS and 2) reactive protection like quarantining and signature-based antimalware technologies. Other client security vendors will need to build or acquire features to keep pace. Smaller antivirus vendors like Panda Software, Sophos, or

Kaspersky Labs will become acquisition targets for the likes of Check Point. CA and McAfee should pursue network quarantine vendors like InfoXpress and WholeSecurity and endpoint configuration compliance vendors like Bindview or Configuresoft.⁴

ENDNOTES

- ¹ To assess the state of the client security suite market and to see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top client security suite vendors across 170 criteria. The result: McAfee and Symantec lead the pack for complete and robust client security tool sets; Trend Micro offers a comprehensive solution for known threats; and CA will offer a strong suite by the end of 2006. See the June 22, 2005, Tech Choices “The Forrester Wave™: Client Security Suites, Q2 2005.”
- ² Forrester believes that network quarantine — the dynamic restriction of client systems’ access to networks based on their compliance with policy — will surge in the second half of 2005. Sygate’s Secure Enterprise is a full suite of security solutions that combines quarantine with host-based intrusion prevention. Sygate offers several quarantine enforcement options — with its Endpoint Enforcement, LAN Enforcer (full 802.1X support), and Gateway Enforcer products — giving it the most robust software-based solution. See the June 28, 2005, Tech Choices “Choosing The Right Network Quarantine Solution.”
- ³ Forrester surveyed 200 technology decision-makers at North American companies about their approaches to IT security. We learned that companies overwhelmingly prefer best-of-breed client security products to client security suites by nearly a 3-to-1 margin. See the February 28, 2005, Trends “Client Security Trends: Users Opt For Best-Of-Breed Tools.”
- ⁴ CA has recently acquired two client security vendors — Qurb and Tiny Software — to enhance its security offerings. See the July 29, 2005, Quick Take “Computer Associates Stakes Its Position As A Security Vendor.”