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Now Tech: Zero Trust Solution Providers, Q2 2020

Forrester's Overview Of 38 Zero Trust Solution Providers

by Chase Cunningham

May 1, 2020 | Updated: May 27, 2020

Why Read This Report

You can use Zero Trust solution providers to eliminate easy targets, take back the initiative, and clarify technology benefits for stakeholders. But to realize these benefits, you'll first have to select from a diverse set of vendors that vary by size, functionality, geography, and vertical market focus. Security and risk professionals should use this report to understand the value they can expect from a Zero Trust solution provider and to select one based on size and functionality.

Key Takeaways

Enable Your Security Strategy With Zero Trust Technologies

This is really about strategy, but let's face it — good tools enable good strategy. To decipher which solutions offer the most clearly aligned capabilities, use our Zero Trust eXtended (ZTX) framework as your Rosetta stone to translate this increasingly complex space.

Select Vendors Based On Size And Functionality

Do best-of-breed pillar capabilities or bigger platform offerings suit your needs and enable your Zero Trust strategy? Use this report to help streamline your decision making based on our analysis of available solutions.

Choose Zero Trust Solutions That Align With Your Enterprise Strategy

There are a variety of offerings in the visibility and analytics pillar of ZTX. While those solutions have powerful capabilities, if they don't produce useful outcomes based on your needs, they aren't really helping.

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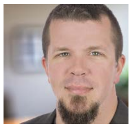

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Enable Your Security Strategy With Zero Trust Technologies

The Zero Trust market continues to evolve and diversify. Zero Trust has evolved from a focus on firewalls and data isolation to becoming a comprehensive, practical approach for security. While Zero Trust is a strategic initiative, not a technology or tool, there are tools and technologies that enable it. To achieve the ultimate Zero Trust end state, you'll need to make decisions on a variety of technical solutions that map to the ZTX framework.[1] Vendor marketing-speak talks about "solutionizing" Zero Trust to security leaders who are deploying technical solutions to enable their Zero Trust strategies. Open source research estimates that the Zero Trust market will be as large as $38 billion by 2024 due to the expansive offerings that a Zero Trust infrastructure requires to function.[2] Forrester defines the Zero Trust market space as:

> *Technologies that enable a Zero Trust strategy through a cohesive combination of best-of-breed and platform solutions that deliver a variety of capabilities across the pillars of the ZTX framework, including data security, workload security, network security, user security, device security, automation and orchestration, and visibility and analytics.*

Firms delivering Zero Trust solutions help security pros:

› **Eliminate the easy targets.** Attackers go after the simple stuff first. Default configurations, weak passwords, excessive privileges, and lack of microsegmentation lead to exploitation. Zero Trust limits the impact of exploits targeting these simple — but harmful — configuration errors.

› **Take back the initiative.** In truth, the adversaries are the ones who've been dictating where and when they exploit and engage an organization's assets as they maneuver within an already compromised infrastructure. Employing well-aligned Zero Trust tooling enables organizations to drive hackers out of their dark corners and limit their ability to maintain a foothold.

› **Clarify technology benefits for stakeholders.** Security isn't just about security anymore. Good security is a business enabler and a differentiator. Leaders who can convey how the technologies they select will enable their security strategy will help the business thrive.

Select Vendors Based On Size And Functionality

We've based our analysis of the Zero Trust market on two factors: market presence and functionality.

Zero Trust Solution Market Presence Segments

We segmented the vendors in this market into three categories, based on Zero Trust solution revenue: large established players (more than $190 million in Zero Trust solution revenue), midsize players ($35 million to $190 million in revenue), and smaller players (less than $35 million in revenue) (see Figure 1).

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FIGURE 1 Now Tech Market Presence Segments: Zero Trust Solution Providers, Q2 2020

NOW TECH

Zero Trust Solution Providers

Q2 2020

LARGE >$190M in annual category revenue

Akamai*
Cisco*
Fortinet*
Google*
Illumio*
Microsoft*
Okta*
Palo Alto Networks*
Proofpoint*
Unisys*

MIDSIZE $35M to $190M in annual category revenue

AlgoSec
Armis*
Centrify
Check Point Software Technologies*
FireMon*
Forcepoint*
Forescout*
Gigamon
GitLab
Ionic Security*
MobileIron*
Tufin*
Venafi

SMALL <$35M in annual category revenue

A10 Networks*
AppGate
Awingu
Axis Security
BlackBerry*
ClearedIn
ColorTokens
Edgewise
Guardicore
HyperQube
IBM Security*
IDENProtect
Infocyte*
ShieldX Networks
ThreatLocker*
Zentera Systems*

*Forrester estimate

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Zero Trust Solution Functionality Segments

To explore functionality at a deeper level, we broke the Zero Trust market into two segments, each with varying capabilities (see Figure 2):

- **A Zero Trust platform allows firms to leverage other security tooling and applications.** A Zero Trust platform is a group of technologies used as a base upon which other security tooling, applications, processes, or technologies are leveraged. A firm can use solutions in this sector as a singular tool or a subset of technologies that operate collaboratively to enable significant sections of a Zero Trust strategy.
- **A Zero Trust pillar is best-of-breed singular tooling that solves specific problems.** Solutions in this segment are functionally best-of-breed solutions that address pressing, but singular, security use cases. Organizations can plug these solutions into Zero Trust platforms via APIs and other means but can also leverage them on their own to solve specific technical problems.

FIGURE 2 Now Tech Functionality Segments: Zero Trust Solution Providers, Q2 2020

	Zero Trust platform	Zero Trust pillar
User (workforce)	High	High
Workloads	High	Moderate
Networks	Moderate	Moderate
Devices	High	High
Automation/orchestration	High	Moderate
Visibility/analytics	Moderate	Moderate
Data	High	High

Segment functionality None Low Moderate High

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Align Individual Vendor Solutions To Your Organization's Needs

The following tables provide an overview of vendors with details on functionality category, geography, and vertical market focus (see Figure 3, see Figure 4, and see Figure 5).

FIGURE 3 Now Tech Large Vendors: Zero Trust Solution Providers, Q2 2020

LARGE >$190M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
Akamai	Zero Trust platform	NA 56%; LATAM 3%; EMEA 22%; AP 19%	Media and entertainment; travel and hospitality; education	Priceline; Spie Batignolles; Tunghai University
Cisco	Zero Trust platform	NA 100%*	Government; financial services; manufacturing	BBVA Spain; First National Bank South Africa; United Airlines
Fortinet	Zero Trust pillar	NA 42%; EMEA 38%; AP 20%	Service providers; government; financial services	Echoenergia; UNITED HERE Health; Warrior Invictus
Google	Zero Trust platform	NA 46%; EMEA 31%; AP 17%; other 6%	Retail; healthcare; financial services	Airbnb; Credit Suisse; NYC Cyber Command
Illumio	Zero Trust platform	NA 65%; EMEA 25%; AP 10%	Banking and financial services; high-tech; transportation and logistics	BNP Paribas; Cathay Pacific; Salesforce
Microsoft	Zero Trust platform	NA 100%*	Banking and insurance; manufacturing; retail*	Bridgewaters; Comcast; Vodafone Global; The Walsh Group; Wärtsilä
Okta	Zero Trust platform	NA 84%; LATAM 4%; EMEA 9%; AP 3%*	Financial services; high-tech; insurance	21st Century Fox; AECOM; Major League Baseball

*The vendor did not provide information for this cell; this is Forrester's estimate.

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FIGURE 3 Now Tech Large Vendors: Zero Trust Solution Providers, Q2 2020 (Cont.)

LARGE >$190M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
Palo Alto Networks	Zero Trust platform	NA 68%; EMEA 19%; AP 13%*	High-tech; financial services; wholesale and retail	BYU Hawaii; FNTS; State of North Dakota
Proofpoint	Zero Trust platform	NA 80%; other 20%*	Financial services; healthcare; business services	Interpublic; Lattice; Michigan State University
Unisys	Zero Trust platform	NA 30%; LATAM 3%; EMEA 17%; AP 50%	Financial services; government; manufacturing	Genuine Parts Company; OTP Bank; Philippines Statistics Authority

*The vendor did not provide information for this cell; this is Forrester's estimate.

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FIGURE 4 Now Tech Midsize Vendors: Zero Trust Solution Providers, Q2 2020

MIDSIZE $35M to $190M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
AlgoSec	Zero Trust pillar	NA 43%; LATAM 5%; EMEA 35%; AP 17%	Financial services; telecom; government	Fiducia; State of Utah; Telefonica
Armis	Zero Trust pillar	NA 80%; EMEA 10%; AP 10%	Manufacturing; healthcare; technology	Mondelēz; Oracle; Sysco
Centrify	Zero Trust pillar	NA 80%; LATAM 1%; EMEA 17%; AP 2%	Financial services; public sector; professional services	TD Ameritrade; Tractor Supply Co.; Ubisoft
Check Point Software Technologies	Zero Trust platform	NA 45%; EMEA 44%; AP 11%	Financial services; government and military; healthcare	Banregio; Cadence Design Systems; EuroWind Energy
FireMon	Zero Trust pillar	NA 100%*	Financial services; retail; healthcare	Vendor did not disclose
Forcepoint	Zero Trust platform	NA 38%; LATAM 5%; EMEA 43%; AP 14%	Government; financial services; business services	AT&T; BNP Paribas; Delta
Forescout	Zero Trust platform	NA 70%; EMEA 20%; AP 10%*	Government; financial services; healthcare	City of Atlanta; Humana; JP Morgan Chase
Gigamon	Zero Trust pillar	NA 76%; LATAM 2%; EMEA 14%; AP 8%*	Government; healthcare and insurance; financial services and banking	Chicago Mercantile Exchange; FireEye; Mimecast; Under Armour
GitLab	Zero Trust pillar	NA 62%; LATAM 2%; EMEA 29%; AP 7%	Government; internet software and services; technology	BI Worldwide; Glympse; KnowBe4
Ionic Security	Zero Trust pillar	NA 100%*	Financial services; public sector; healthcare	Enablus; JP Morgan Chase; TheSimpleVUE; US Department of Homeland Security

*The vendor did not provide information for this cell; this is Forrester's estimate.

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FIGURE 4 Now Tech Midsize Vendors: Zero Trust Solution Providers, Q2 2020 (Cont.)

MIDSIZE $35M to $190M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
MobileIron	Zero Trust platform	NA 45%; LATAM 1%; EMEA 44%; AP 10%	Government; manufacturing; financial services and insurance	City of Stockholm; Eurostar; Nasdaq
Tufin	Zero Trust pillar	NA 57%; EMEA 38%; AP 5%*	Financial services; telecom; manufacturing	Ensono; RWE; Swisscom
Venafi	Zero Trust pillar	NA 78%; EMEA 17%; AP 5%	Financial services; technology; insurance	Aflac; Wells Fargo

*The vendor did not provide information for this cell; this is Forrester's estimate.

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FIGURE 5 Now Tech Small Vendors: Zero Trust Solution Providers, Q2 2020

SMALL <$35M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
A10 Networks	Zero Trust pillar	NA 61%; LATAM 7%; EMEA 8%; AP 24%	Service providers; cloud providers; education*	Comcast; Klein Independent School District; Microsoft Azure
AppGate	Zero Trust pillar	NA 47%; LATAM 39%; EMEA 10%; AP 4%	Financial services; business services; technology and telecom	Chewy.com; GE Current
Awingu	Zero Trust pillar	NA 14%; LATAM 3%; EMEA 80%; AP 3%	Banking and insurance; healthcare; public sector	Belgian Federal Police; Proximus; Ziekenhuis Zuid-Oost Limburg
Axis Security	Zero Trust pillar	NA 100%*	Transportation services; hospitality; wholesale	Vendor did not disclose
BlackBerry	Zero Trust platform	NA 75%; LATAM 8%; EMEA 9%; AP 8%*	Financial services; healthcare; government	Bennett; Engelbert Strauss; University Hospitals Belgium
ClearedIn	Zero Trust pillar	NA 100%	Healthcare; biotech; technology	Edwards County Medical Center; Tekion; Unqork
ColorTokens	Zero Trust pillar	NA 60%; EMEA 35%; AP 5%	Retail; manufacturing; healthcare	Compex; Forever 21; Imerco
Edgewise	Zero Trust pillar	NA 100%	Financial services; consulting services; software vendors	Driscoll's; Goulston & Storrs; Vonage
Guardicore	Zero Trust pillar	NA 55%; LATAM 6%; EMEA 36%; AP 3%*	Financial services; healthcare; telecom	Deutsche Bank; Intermountain Healthcare; Santander
HyperQube	Zero Trust pillar	NA 100%	Government; education; business services*	IDS International; Marymount University; US Department of Homeland Security

*The vendor did not provide information for this cell; this is Forrester's estimate.

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FIGURE 5 Now Tech Small Vendors: Zero Trust Solution Providers, Q2 2020 (Cont.)

SMALL <$35M in annual category revenue

	Primary functionality segments	Geographic presence (by revenue %)	Vertical market focus (by revenue)	Sample customers
IBM Security	Zero Trust platform	NA 45%; LATAM 5%; EMEA 30%; AP 20%*	Financial services; public sector; distribution	ABANCA; Fannie Mae; Great America Insurance Group
IDENProtect	Zero Trust pillar	EMEA 95%; AP 5%	Financial services; government; technology	Dubai Airports Group; Saudi Enaya; UBS
Infocyte	Zero Trust pillar	NA 72%; LATAM 5%; EMEA 20%; AP 3%	Managed security service and incident response; government; financial services	Check Point Software; Grant Thornton UK; NFP Financial
ShieldX Networks	Zero Trust pillar	NA 85%; EMEA 5%; AP 10%	Transportation services; insurance; technology	Alaska Airlines; Hitachi; Lumentum; Park Holidays
ThreatLocker	Zero Trust pillar	NA 70%; EMEA 20%; AP 10%	Managed security and IT services; healthcare; financial services	Commercial Bank of Tennesee; Eurovia; Juern Technology
Zentera Systems	Zero Trust pillar	NA 60%; EMEA 10%; AP 30%	Technology; manufacturing; financial services	Delta Electronics; Qualcomm; Siemens

Recommendations

Choose Zero Trust Solutions That Align With Your Enterprise Strategy

Getting to the end state of a fully operational Zero Trust infrastructure isn't easy. Be careful as you evaluate and consider vendor solutions to enable your Zero Trust strategy. Certain capabilities will be necessary, but some will just be nice to have. Push vendors to specifically describe how their solutions map to and enable your Zero Trust plans. As you progress, make sure you:

› **Focus on the capabilities, without getting wrapped up in the platform or pillar specifics.** Too often, security and risk pros are myopic in their focus on whether a solution is part of a platform or only a singular, pillar-based offering. That doesn't really matter. What matters is whether the problem you're trying to solve is addressable with the capabilities that the vendor offers. Don't get

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mired down trying to buy only a platform or just best-of-breed singular tooling. If the solutions the vendors are offering don't play well with others, don't integrate with the rest of your tech stack, and aren't going to help you achieve that Zero Trust end state, they won't be much help to you.

› **Ask vendors if they're using their own offerings.** If a vendor is touting how its solution enables Zero Trust, it must surely use its own solution to enable that strategy in its corporate environment. If not, why not? Ask vendors how they use what they offer and why they chose certain solutions for themselves. If they can't answer this question or aren't using their own solutions to enable their Zero Trust strategies, why should you?

› **Map vendor solutions into your maturity curve.** Use Forrester's ZTX security maturity assessment and guide to gauge your organization's position on the maturity curve for Zero Trust.[3] Map vendor offerings onto the curve at specific points to increase your maturity and progression. Vendors that really understand Zero Trust will empower your journey by understanding how their offerings fit into the model and support your Zero Trust maturity.

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Supplemental Material

Market Presence Methodology

We defined market presence in Figure 1 based on survey data provided by vendors, publicly available data, and comparisons with Zero Trust peer organizations.

To complete our review, Forrester requested information from vendors. If vendors did not share this information with us, we made estimates based on available secondary information. We've marked companies with an asterisk if we estimated revenues or information related to geography or industries. Forrester fact-checked this report with vendors before publishing.

Companies Interviewed For This Report

We would like to thank the individuals from the following companies who generously gave their time during the research for this report.

A10 Networks
Akamai
AlgoSec
AppGate
Armis
Awingu
Axis Security
BlackBerry
Centrify
Check Point Software Technologies
Cisco
ClearedIn
ColorTokens
Edgewise
FireMon
Forcepoint
Forescout
Fortinet
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ShieldX Networks

ThreatLocker

Tufin

Unisys

Venafi

Zentera Systems

Endnotes

[1] See the Forrester report "The Zero Trust eXtended (ZTX) Ecosystem."

[2] Source: "Zero-Trust Security Market by Solution Type (Data Security, Endpoint Security, API Security, Security Analytics, Security Policy Management), Deployment Type, Authentication Type, Organization Size, Vertical, and Region - Global Forecast to 2024," Markets and Markets (https://www.marketsandmarkets.com/Market-Reports/zero-trust-security-market-2782835.html).

[3] See the Forrester report "Gauge Your ZTX Security Maturity" and see the Forrester report "A Practical Guide To A Zero Trust Implementation."

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