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INDUSTRY RESEARCH

State Of The Firewall 2014 Report – Executive Summary

In late 2014, FireMon surveyed over 700 IT security practitioners to better understand current perceptions regarding the role that firewall infrastructure continues to play in the larger domain of network security management and access control.

With full results published in the FireMon State of the Firewall 2014 Report, survey respondents represented a wide range of professional skills, end user organizations and vertical industries. As indicated by survey results, three overarching trends were established:

- Firewalls remain highly strategic, despite pervasive management challenges, driven by a wide range of requirements, most notably API integration and Next-Generation Firewalls (NGFW) capabilities.

- Next-generation devices are seen as critical and being adopted gradually, with a wide range of intentions and a broad set of related management and migration concerns.

- Firewalls will play a significant role in emerging cloud, SDN and DevOps paradigms, which are viewed as major shifts in overarching matters of network evolution.

The following sections summarize survey findings that reinforce these trends, lending statistical data in support of the conclusion that network firewalls remain as relevant as ever and will continue to stand as critical elements of access control into the foreseeable future.

Firewall Management: Continued Relevance, Pervasive Challenge

The survey results highlighted the continued relevance of firewall infrastructure within today's network environments, along with related management concerns. Results included:

- Over 95% of respondents indicated that firewalls remain as critical as ever to security management, or more critical than ever.

- Over 50% of respondents cited firewall rules and policy complexity as their most problematic network security management concern.

- While traditional metrics of price and performance remain significant factors related to firewall acquisition, respondents ranked "APIs – Third Party Integration" above all other capabilities.

State of the Firewall 2014 Survey Demographics:

- 700 respondents including management, operations and audit officials

- Over 62% of respondents from organizations with 1,000 or more employees

- Leading vertical markets represented: Finance, Business Services and Government

NGFW Adoption: Growing Deployment, Diverse Expectations

The survey results highlighting the rapidly increasing, yet relatively nascent role played by NGFWs within today's network environments included:

- Less than 12% of respondents indicated that they have yet to deploy NGFWs, with 25% indicating that NGFWs already account for over 50% of their systems.

- The leading NGFW capabilities respondents seek to leverage were intrusion prevention (60%), application awareness (58%), and threat data integration (56%).

- Top NGFW management challenges cited were optimizing rule sets (38%), enforcing access and policies (32%) and meeting best practice configuration recommendations (31%).

Emerging Paradigms: Cloud Computing, SDN and DevOps

The survey results highlighting the evolving relationship between network security infrastructure and the emerging technology paradigms of virtualization, cloud computing, SDN and DevOps included:

- Nearly 87% of respondents indicated that traditional or NGFW devices play a valuable role in securing virtualized environments.

- Nearly 60% of respondents indicated that traditional or NGFW devices play a valuable role in securing cloud-based computing platforms.

- While 43% of respondents indicated that firewalls will continue to play an important role in securing SDN environments, only 29% indicated that SDN will create a new security paradigm limiting the role of traditional firewalls.

- While a greater number of respondents (38%) indicated that existing infrastructure is not inhibiting adoption of DevOps than those that said it was (23%), most respondents (39%) said this remains unclear.

Conclusion

While it is clear that network security management processes continue to evolve at a rapid pace, both in the form of the technologies utilized and the very networking paradigms they are used to defend, the FireMon State of the Firewall 2014 Report resoundingly finds any perceived reduction in the importance of firewall infrastructure to be premature, if not inaccurate, within the context of today's practitioners.

Rather than supporting any notion that firewall devices, either in their traditional "stateful" form or that of emerging "next-generation" systems, will greatly be diminished, the State of the Firewall 2014 Report reinforces that practitioners view these platforms as a critical component of their overall strategy, both today and in the future.

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