

IDC Report Overview

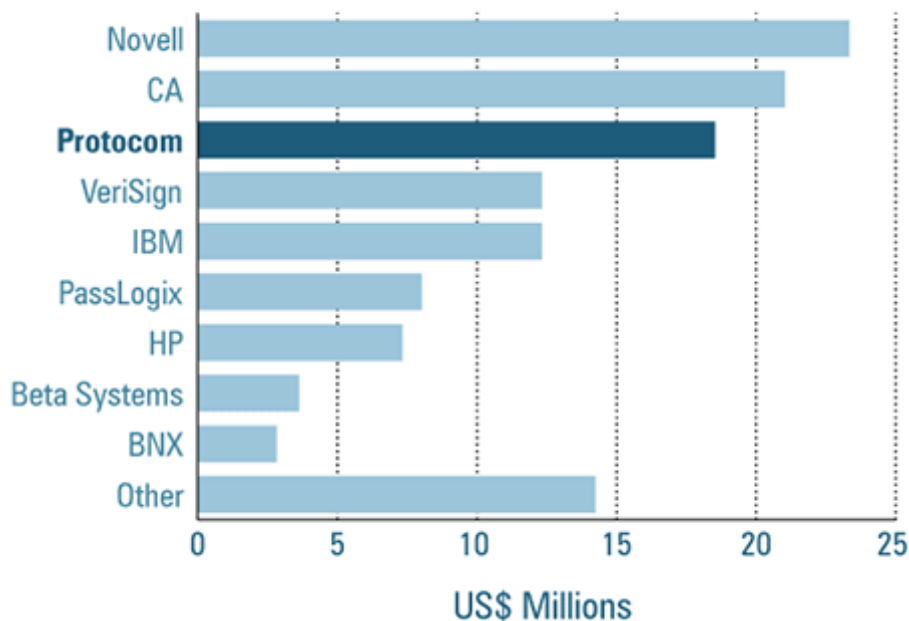
IDC reports vendor market share revenue for single sign on.....

Table 1. below contains 2003 vendor market share revenue for the host single sign on market. The data in this table is derived from the report entitled "Worldwide Identity and Access Management 2004–2008 Forecast and 2003 Vendor Shares: The Death of Security 3A, Part I". (IDC Reference #31997, November 2004).

Host single sign on enables users to login to internal applications, databases, and other corporate systems with just one identity. These solutions are fundamental to enterprises enforcing password policies and eliminating the need for employees to remember multiple passwords.

The IDC report confirms that Protocom's single sign on technology and products are among the leaders in the sector. According to IDC, Protocom held the number three position in the host single sign on market with 15.0% share in 2003. In addition, Protocom developed technology is licensed to OEM Partner Novell, the market leader with a share of 18.9%.

Worldwide host single sign-on software revenue 2003



"Protocom's leadership is based on two elements, its own position among the top three host single sign on vendors as well as its technology contribution to the market leader," according to Chris Christiansen, Vice President of IDC's Security Products and Services programs.

"IDC once again confirms Protocom's technology leadership in the host single sign on market space. This is reinforced by the large number of leading enterprises that have benefited from the enhanced security and reduced credential management overheads as a result of deploying Protocom technology over the last 12 months", said Jason Hart, Protocom CEO.

"Protocom technology continues to lead growth and development, and innovation in this space. In a market that is becoming increasingly competitive, Protocom and key partner Novell are investing heavily in R&D to ensure that its technology continues to meet customer needs and government regulatory requirements," Hart said.

	2002 Revenue	2003 Revenue	2003 Market share	2002 - 2003 Growth
Novell	24.1	23.3	18.9%	-3.3%
CA	18.1	21.0	17.0%	16.0%
Protocom	15.0	18.5	15.0%	23.3%
VeriSign	10.4	12.3	10.0%	18.3%
IBM	11.8	12.3	10.0%	4.2%
PassLogix	6.5	8.0	6.5%	23.1%
HP	6.4	7.3	5.9%	14.1%
Beta Systems	5.0	3.6	2.9%	-28.0%
BNX	1.5	2.8	2.3%	86.7%
Other	13.0	14.2	11.5%	8.8%
Total	111.8	123.3	100.0%	10.2%

Table 1. Vendor revenue and market share for Host Single Sign On 2002 & 2003 (IDC)