

Canalys Global Cybersecurity Leadership Matrix 2021

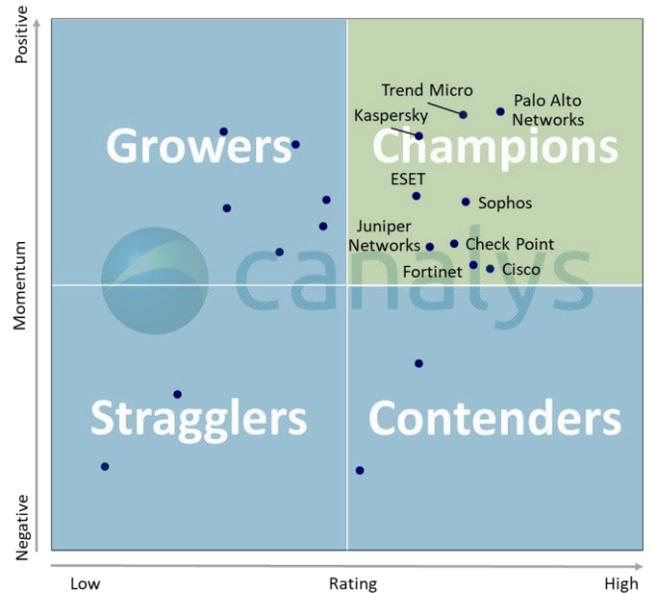
Summary

The acceleration of digital transformation projects and subsequent cloud adoption, as well as extended mass remote working over the last 12 months have increased vulnerabilities, data loss, and targeted ransomware attacks. This has resulted in significant disruption and financial loss for many organizations at a challenging time. However, high profile attacks have also raised awareness and demand for cybersecurity. The role of the channel in providing the latest products and services to secure their customers is more important than ever, with partner enablement by vendors being just as critical. Consequently, the channel is a key area of differentiation for the leading cybersecurity vendors in a highly competitive sector.

Check Point, Cisco, ESET, Fortinet, Juniper Networks, Kaspersky, Palo Alto Networks, Sophos and Trend Micro were identified as the channel Champions in the 2021 edition of the Canalys Global Cybersecurity Leadership Matrix.

Unique feedback from channel partners, Canalys quarterly shipment estimates and analyst insight were used to determine the position of vendors in the highly competitive cybersecurity ecosystem, in terms of market performance, vision, leadership and change capabilities. The Leadership Matrix considered 19 cybersecurity vendors, based on a minimum threshold of channel partner feedback via the Candefero Vendor Benchmark, to assess their channel performance over the last 12 months.

Global Cybersecurity Leadership Matrix
June 2020 to July 2021



Global Cybersecurity Leadership Champions 2021



Champions have a combination of the highest and most consistent scores in the Candefero Vendor Benchmark, the largest share of shipments, and have maintained strong growth. They exhibit common characteristics. These include positive partner sentiment, a focus on continuous improvements in processes to drive simplicity and ease of doing business, a willingness to boost growth opportunities and increase profitability for partners, a focus on training and enablement, and a demonstrable commitment to growing the share of revenue generated through the channel. The nine Champions in this year's global Leadership Matrix have maintained or extended their strong positions in the highly competitive cybersecurity market via the channel.

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Summary

Cisco, ESET, Fortinet, Juniper Networks, Kaspersky, Palo Alto Networks and **Trend Micro** reaffirmed their positions as Champions and are joined by **Check Point** and **Sophos** in the 2021 edition of the Canalys Cybersecurity Leadership Matrix. Key investment priorities across all the leading vendors during the review period include:

- Increasing partner profitability and sales of new technologies through targeted rebates and incentives
- Driving the transition to subscriptions, managed services and new consumption-based models
- Securing new customer wins and renewals with deal registration and partner dashboard improvements
- Automating processes to improve agility and ease of doing business
- Developing new routes-to-market via digital marketplaces
- Moving training online and encouraging differentiation through new specializations
- Enabling partners to target new influencers within their customers, such as DevOps

Check Point improved its partner ratings and gained Champion status after continued investments focused on enabling partners to win new accounts and drive sales across its four solutions: Quantum for network security, CloudGuard for cloud security, Harmony for securing access, and Vision for unified management.

Cisco remained the largest vendor in the cybersecurity channel in 2020. It reorganized its cybersecurity business around SASE, Zero Trust and XDR under the Cisco Secure brand. It is also transitioning its Partner Program to focus on SaaS, managed services and cloud solutions, as well as customer lifecycle management.

ESET's technical support, account management and overall ease of doing business was rated the highest by its partners. It continued to invest in increasing its presence in enterprise accounts and enhanced its Global Managed Service Provider Program with the release of its EMA2 marketplace platform.

Fortinet's partner ratings improved on last year, as it maintained its rapid market expansion. Its Security Fabric strategy enables partners to differentiate in key growth segments. The launch of its Engage 2.0 Partner Program added Zero Trust Access, Operational Technology and Security Operations specializations.

Juniper Networks strengthened its Connected Security strategy with the introduction of Security Director Cloud for unified SASE management across on-premises and cloud environments. It also enhanced the Juniper Partner Advantage program, with incentives for solution selling with its Growth Rewards Program.

Kaspersky had the highest partner ratings in this year's Leadership Matrix, especially on pricing speed and competitiveness, as well as quality of account management. It continued to expand its MSP ecosystem, while channel initiatives remained focused on profitability, ease of doing business and support for partners.

Palo Alto Networks made strong gains in the cybersecurity channel, while its partner ratings continued to rise. The launch of its NextWave 3.0 partner program will accelerate partner differentiation and growth with specializations and incentives around Prisma SASE, Prisma Cloud, and Cortex XDR/XSOAR.

Sophos had the highest rise in partner ratings this year, following the launch of its new Global Partner Program, as part of its partner-first approach. This helped to elevate its status to Champion. Sophos Central, RMM integrations, and consumption-based sales incentives have accelerated its growth with MSPs.

Trend Micro's partner ratings continued to rise, highlighting the importance of its channel-first strategy. It has demonstrated it can support partners with different business models effectively, and is a leader and partner enabler in key emerging areas, including cloud migration and hybrid security via cloud marketplaces.

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Growers in the Leadership Matrix have made investments in the channel to improve partner perception over the last year. These vendors are growing and making market share gains. The combination of merger and acquisition strategies, product launches and channel initiatives place these vendors in a strong position to maintain growth and remain key vendors for cybersecurity partners. Six vendors were positioned in the Growers segment in the 2021 edition. These are **Acronis**, **Bitdefender**, **CrowdStrike**, **F5**, **Microsoft**, and **WatchGuard**.

Global Cybersecurity Leadership Growers 2021



Acronis expanded its cybersecurity proposition with the acquisitions of DeviceLock, CyberLynx, Synapsys and Nyotron, and invested in its go-to-market approach with the launch of its new #CyberFit partner program to drive MSP engagement. It is also establishing a partner enablement office in Israel.

Bitdefender strengthened its Partner Advantage Network program with protection for incumbency status, lead generation, and a centralized partner status dashboard. It also expanded partner revenue generating opportunities with the launch of EDR, cloud workload security and MDR offerings.

CrowdStrike's land-and-expand strategy, enabled by free trials, accelerated the adoption of multiple subscriptions within its customer base. Over 60% of accounts subscribe to at least four of its modules. Enabling partners' services businesses is a key focus area, as it continues to build its Elevate program.

F5 expanded its adaptive application delivery and security proposition with the acquisitions of NGINX, Shape Security and Volterra. It launched a subscription growth program, focusing on partner adoption and expansion. Developing partners' managed service practices remains a priority with its Unity+ program.

Microsoft's rise in cybersecurity accelerated, as organizations look to address the complexity of managing multiple vendors by consolidating around select strategic platform vendors. It continued to invest in enabling its partners to build security practices, with a focus on providing resources on compliance.

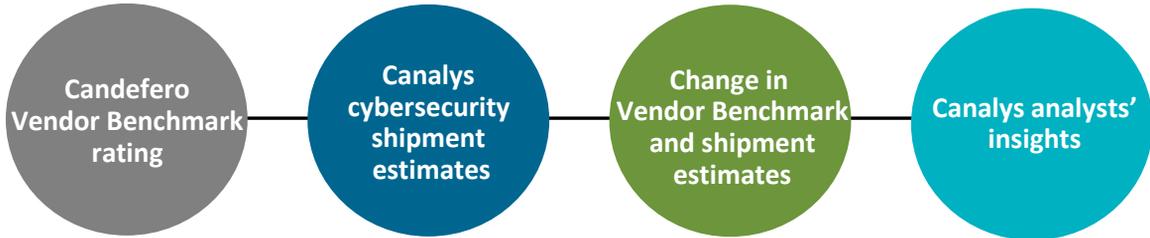
WatchGuard completed the integration of Panda Security's products and channel. Subsequently, it added Endpoint Security as a fourth specialization to its WatchGuardONE partner program to extend the acquired portfolio to its broader partner base. It remains a key vendor for channel partners.

Contenders are vendors still rated highly by partners, but which have faced some challenges, either in market performance or channel sentiment declines, over the last 12 months. Their strategies indicate potential to gain market share, but there are often key challenges to overcome. **IBM** and **SonicWall** are Contenders in the 2021 edition.

The remaining vendors tracked in the Cybersecurity Leadership Matrix are classified as **Stragglers**. These are vendors that have lower partner sentiment compared with their peers and have suffered a decline over the last 12 months. Vendors in this segment have underperformed compared with the market average and lost share. Their channel strategies or future engagement with partners shows some signs of disruption, with partners rating them consistently lower compared with 12 months ago. **Symantec** and **McAfee** were rated as Stragglers for 2021.

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About the Canalys Cybersecurity Leadership Matrix



The Cybersecurity Leadership Matrix assesses vendor performance in the channel, based on worldwide channel feedback into the Vendor Benchmark over the last 12 months (July 2020 to June 2021), vendor feedback on channel program initiatives, and an independent analysis of each vendor. This includes assessing vision and strategy, portfolio competitiveness, customer coverage, channel business, M&A activities, new product launches, recent channel initiatives launched and future channel initiatives planned. The Vendor Benchmark tracks leading technology vendors around the world, collating the experiences that channel partners have when working with different vendors. Channel partners are asked to rate their vendors across the 12 most important areas of channel management.

The Canalys Cybersecurity Leadership Matrix provides a graphical representation to assess the performance of each vendor over time, and positions them in one of four categories:

- **Champions:** Vendors with high channel scores, which have shown both continued improvement in channel management, strategy and execution, and a commitment to driving future improvements.
- **Contenders:** Vendors with high channel scores, but which have seen declines in channel sentiment and/or a deterioration in channel commitment or execution.
- **Growers:** Vendors with low channel scores, but which have seen improvements in channel sentiment and performance.
- **Stragglers:** Vendors with low channel scores, which have seen channel sentiment and/or performance deteriorate or stagnate.

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