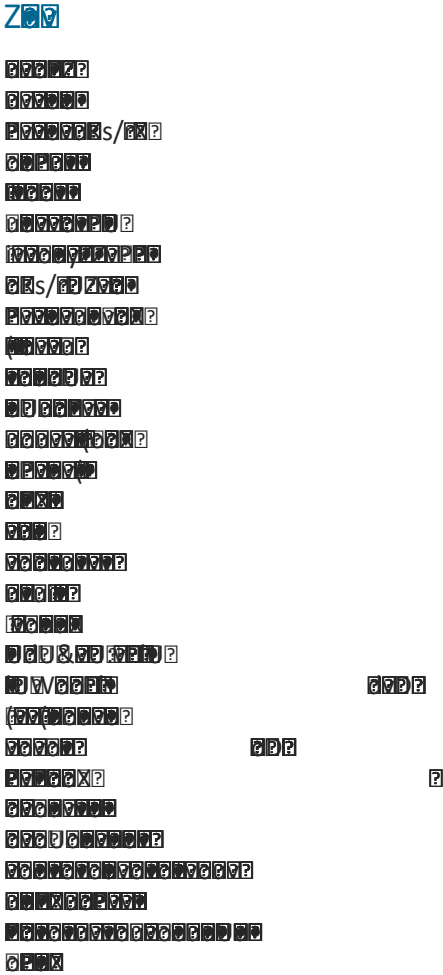


# Matriz de liderazgo en ciberseguridad de Canalys 2020

## Matriz de Liderazgo en Ciberseguridad Global Mayo 2020



**Global Cybersecurity Leadership Champions 2020**










Champions have a combination of the highest scores in the Candefero Vendor Benchmark, the largest share of shipments, and have maintained strong growth. They exhibit some common characteristics. These include positive partner sentiment, ongoing improvements in processes to drive simplicity and ease of doing business, a willingness to boost growth opportunities for partners, and a demonstrable commitment to growing the share of revenue generated through the channel. The seven champions in this year's global Leadership Matrix have maintained or extended their strong positions in the highly competitive cybersecurity market across all regions through the channel.

# Canalys Global Cybersecurity Leadership Matrix 2020

## Summary

**Cisco, ESET, Fortinet and Palo Alto Networks** reaffirmed their positions as champions in the 2020 edition, and have been joined by **Juniper Networks, Kaspersky and Trend Micro**. The latter three vendors have all moved from Growers over the course of the last 12 months through investment in their channel programs. Investment in enabling partners to evolve and establish cybersecurity managed services has been a strategic priority during this period for many of the leading vendors. This is a vital area of channel partner development, as customers face increasing frequency and sophistication of cybersecurity threats, while resource constraints to deal with them will be further intensified post-COVID-19.

Managed services is a strategic area of focus for **Cisco**, which revamped its Cloud and Managed Service Program in 2019 and has allocated dedicated MSP resources to help partners build their practices. The launch of SecureX will help drive its MSP business by providing a unified view of threat detection and policy violations across its portfolio, as well as automated workflows for investigations and remediations. Overall, Cisco remains the leading cybersecurity vendor globally, accounting for 10.1% share of total shipment value.

**ESET's** partners continue to rate the vendor highly for ease of doing business. It launched a new MSP enablement module to drive growth through its 7,000 MSPs, as well as incorporate feedback from local Partner Councils on product roadmaps, technologies and customer needs. A key area of focus is its Strategic Account Program, which is being rolled out across select markets in Asia Pacific and Europe.

**Fortinet** has expanded its portfolio over the last year with the acquisitions of enSilo for endpoint and CyberSponse for SOAR, which will be integrated into its Security Fabric architecture. This presents growth opportunities for its partners to expand into new areas or consolidate multi-vendor offerings. It introduced partner specializations on SD-WAN, Security Fabric, data center operational technology and SOC to target key growth areas. Overall, the vendor has more than 440,000 customers and 25,000 partners worldwide.

2019 was a turnaround year for **Juniper Networks'** security business following the launch of its Connected Security strategy. This offers advanced threat protection to provide enterprises with extended protection across all points of the network. 2020 will be a key year for expansion. The launch of its MSP Cloud program will support Elite and Select level partners on expanding their managed services.

**Kaspersky** became a channel champion following continued investment in its partner program over the past year. It launched its Kaspersky United partner program and partner portal in 2019. Building an MSP community is a key area of focus for the vendor, which has introduced new billing models, hired dedicated account teams and built integrations with RMM and PSA platforms to achieve its goals.

**Palo Alto Networks** was the fastest growing top five cybersecurity vendor in 2019 and has retained its Champion status on the back of consistently high partner ratings. Its accreditations and specializations are ranked highest. It has diversified its business to focus on three areas: Strata for firewalls, Cortex for detection and response, and Prisma for cloud access, data protection and application security. It has invested in its NextWave Partner Program, adding new initiatives aimed at MSPs.

**Trend Micro's** continued investment in its channel-first strategy has elevated its position to Champion status. It remains focused on MSP growth with new offerings, including co-managed services and SOCaaS. It has been a thought leader in cloud migration and hybrid cloud security by working closely with cloud service providers. The launch of its Cloud One platform increases its addressable market and broadens its partners' opportunities with SaaS-based workload, container, application, file storage, network and posture security.

# Canalys Global Cybersecurity Leadership Matrix 2020

## Summary

Growers in the Leadership Matrix have made investments in the channel that have improved 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 partners. Five vendors were positioned in the Growers segment in the 2020 edition. These are **Bitdefender**, **Check Point**, **Malwarebytes**, **WatchGuard** and **Zscaler**.

**Bitdefender** is growing its MSP-focused SMB offerings through new distribution deals, including with Synnex. This follows the revamp of its Cloud Partner Program and MSP program last year. Its partner ratings are consistently high, especially ease of doing business. **Check Point** moved from the Contenders segment in the 2019 edition to become a Grower this year. Its Vendor Benchmark scores increased following the launch of its new Partner Growth Program, which has focused on encouraging winning new customers, growing new areas of its portfolio and improving ease of doing business. **Malwarebytes** is emerging in the endpoint detection and remediation segment. It is simplifying its go-to-market approach by rolling out a new global program to consolidate its engagement with different types of partners, while increasing activities with MSPs. **WatchGuard** has also made investments in both its portfolio and channel program. Its acquisition of Panda will further increase its relevance to SMB-focused partners with the addition of endpoint security. **Zscaler** is building its cloud-centric business rapidly. It recently introduced the new Zscaler Summit Partner Program, designed to give partners more self-service content and dedicated support as part of its transition from velocity to value-based channel relationships.

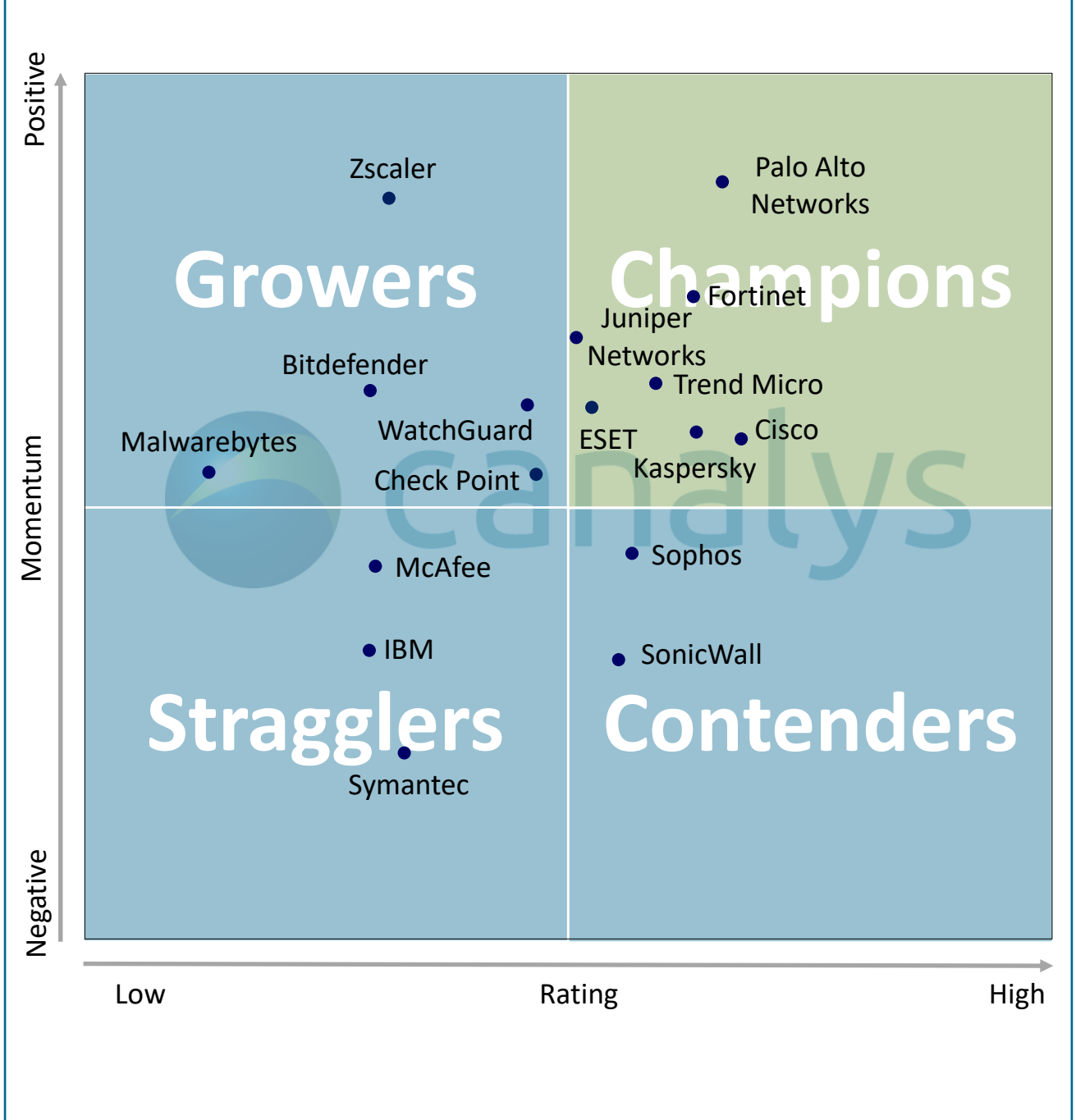
Stragglers are vendors that have lower partner sentiment compared with their peers and have suffered a decline over the last 12 months. Vendors in this segment have underperformed compared with the market average and lost share. Their channel strategies or future engagement with partners shows some signs of disruption, with partners rating them consistently lower compared with 12 months ago.

**Symantec**, **IBM** and **McAfee** were rated as Stragglers for 2020. Symantec's acquisition by Broadcom was highly disruptive for partners. It made cuts to channel support resources, announced the end of sale of new endpoint licenses for its Endpoint Protection Cloud and Endpoint Protection Small Business Edition 2013, while issues moving to Broadcom's systems delayed renewals. Other vendors have capitalized on this situation. IBM continues to face challenges in the channel, due to limited relevance with cybersecurity partners. A key issue is competition over services. Generating growth through service and support and marketing activities and lead-generation were rated the lowest by its partners, while effectiveness of account management and quality of technical support tracked lower compared with a year ago. McAfee is developing a cloud-first approach, but is facing friction from many of its channel partners. Many have indicated a lack of activity and support.

The remaining vendors tracked in the Cybersecurity Leadership Matrix are classified as Contenders. These 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. **Sophos** and **SonicWall** are Contenders in the 2020 edition. Sophos has consistently scored highly among its partners, but sentiment is down from a year ago following its takeover by private equity firm Thoma Bravo, which has created short-term challenges in lead-generation according to partner feedback. Partners highlighted SonicWall needs to be more proactive in support and offer them specialization programs to develop their skills.

# Canalys Global Cybersecurity Leadership Matrix 2020

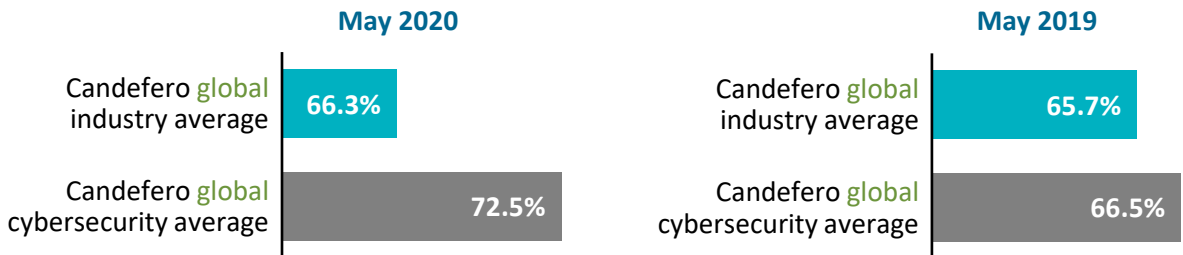
## Global Cybersecurity Leadership Matrix May 2020



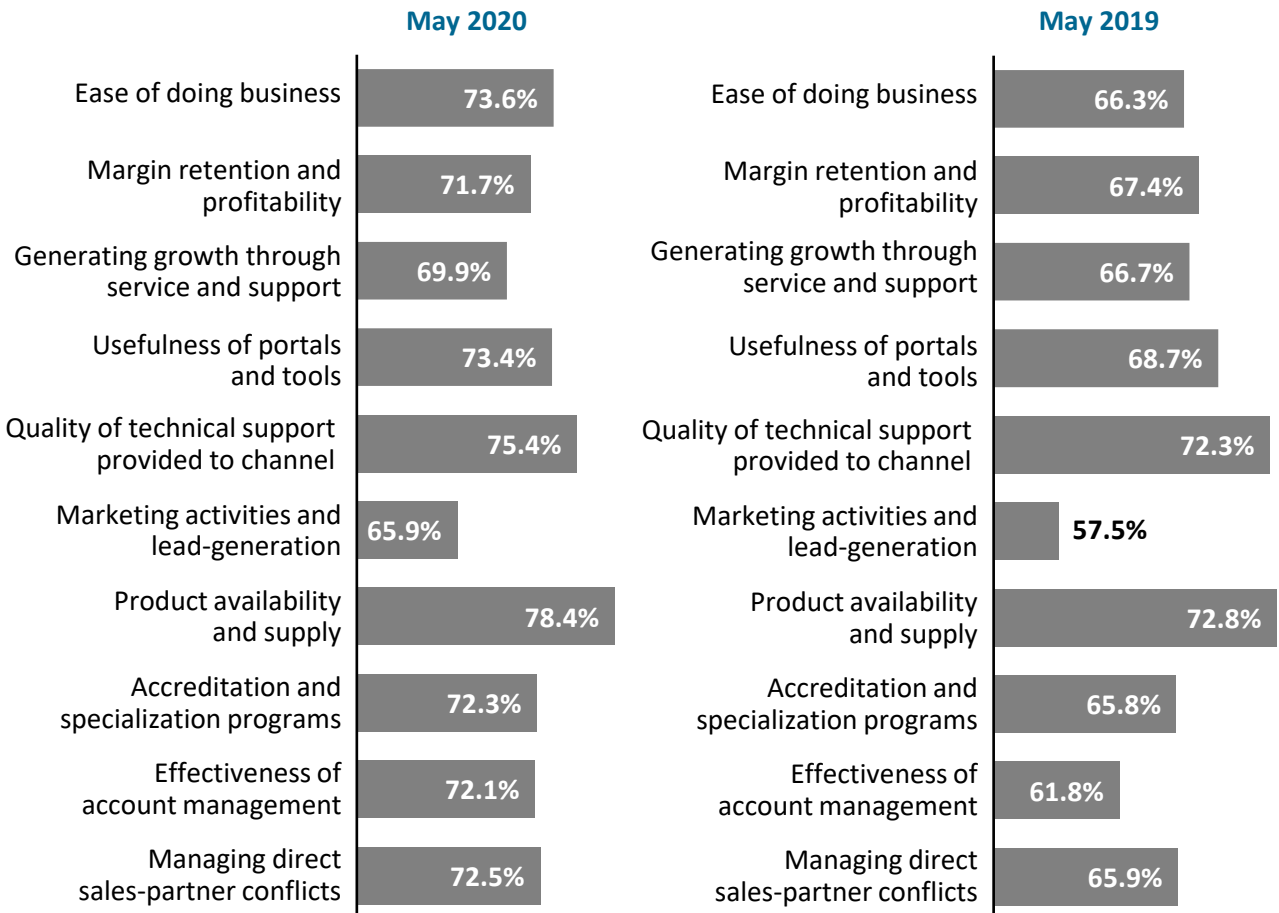
# Canalys Global Cybersecurity Leadership Matrix 2020

## Candefero Vendor Benchmark indicators

**Candefero Vendor Benchmark: aggregated channel feedback scores**



**Candefero Vendor Benchmark: aggregated channel feedback scores by metric for cybersecurity vendors only**

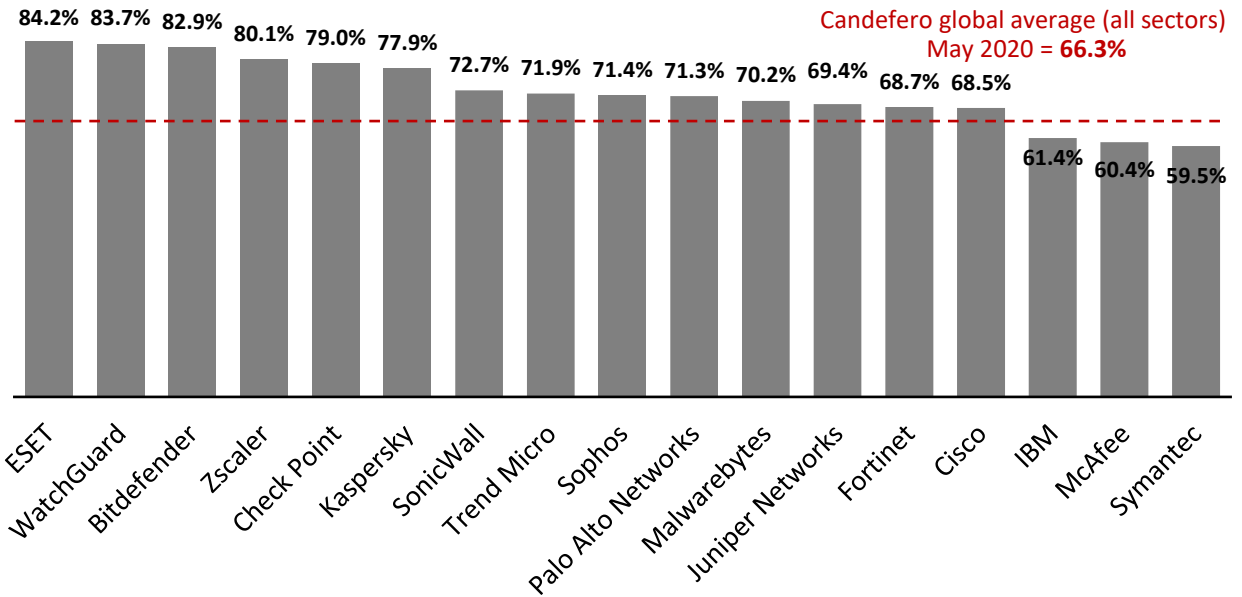


Source: Candefero Vendor Benchmark, May 2020

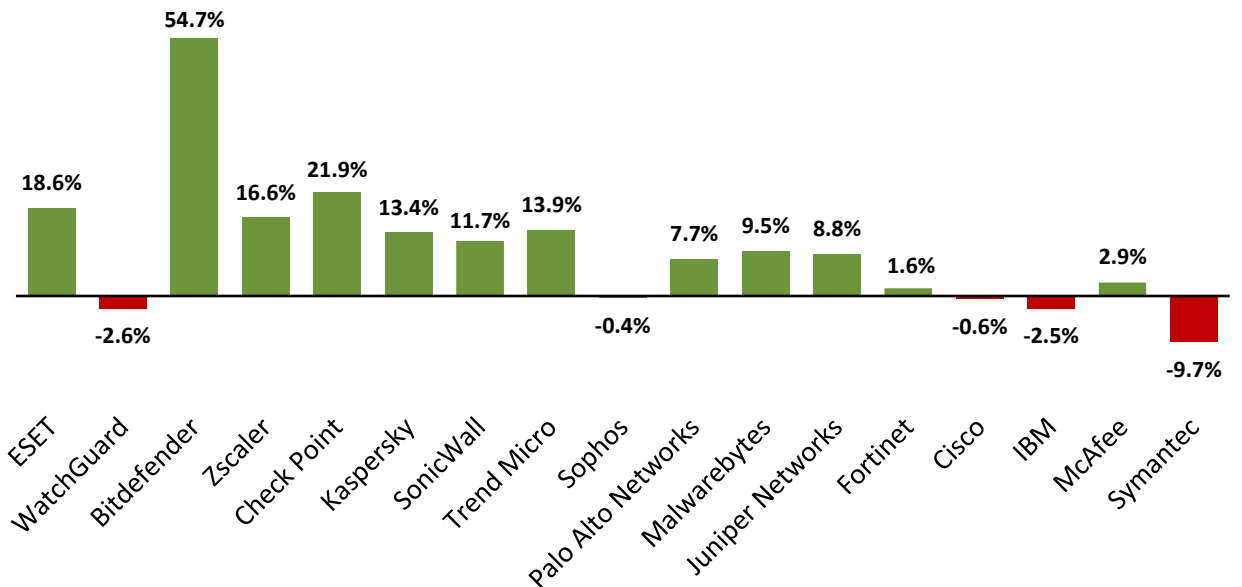
# Canalys Global Cybersecurity Leadership Matrix 2020

## Candefero Vendor Benchmark cybersecurity indicators

**Candefero Vendor Benchmark: Global channel feedback scores by vendor for May 2020**



**Candefero Vendor Benchmark: Global channel feedback change from 12 months ago by vendor for May 2020**

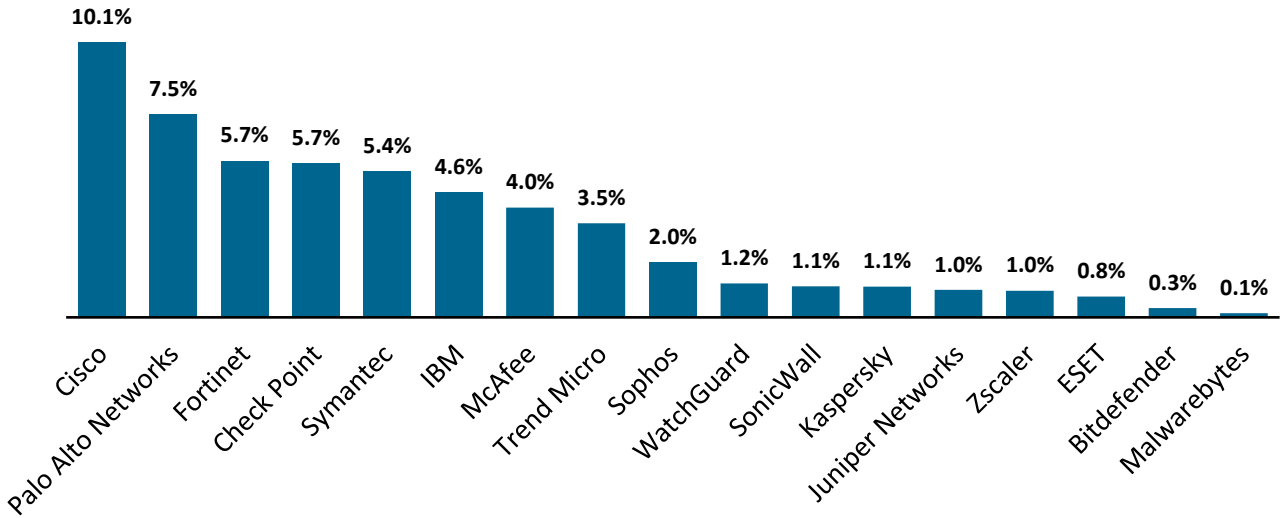


Source: Candefero Vendor Benchmark, May 2020

# Canalys Global Cybersecurity Leadership Matrix 2020

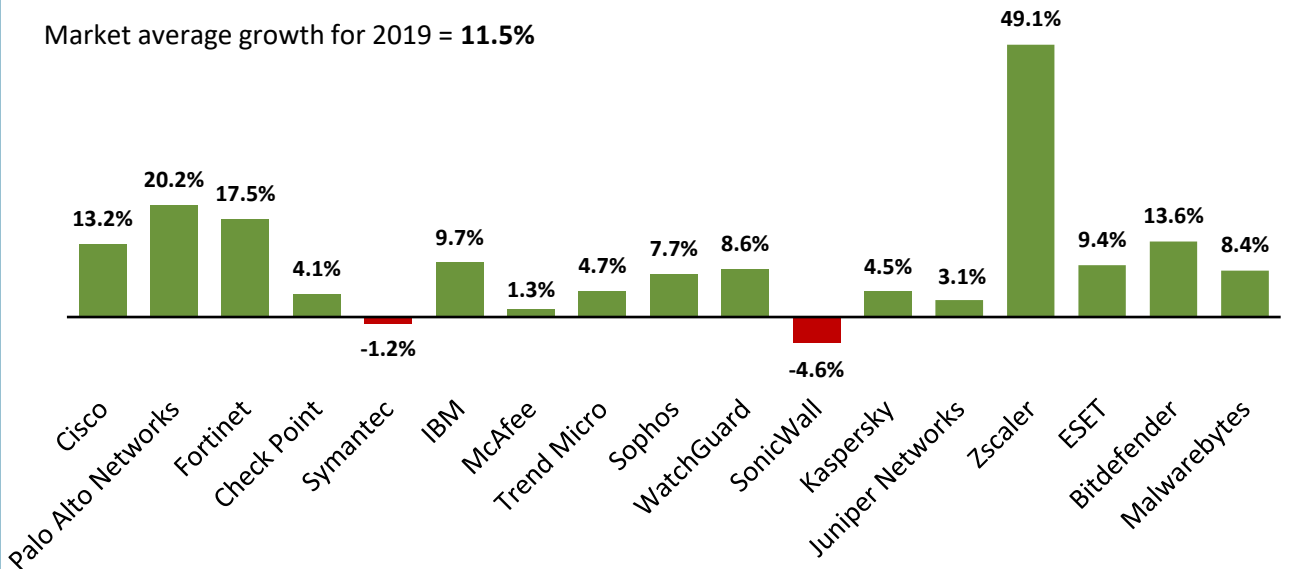
## Canalys cybersecurity vendor shipment indicators

**Canalys cybersecurity estimates: Global market share by vendor 2019**  
(vendors covered in the Cybersecurity Leadership Matrix only)



**Canalys cybersecurity estimates: Global shipment value growth by vendor 2019**  
(vendors covered in the Cybersecurity Leadership Matrix only)

Market average growth for 2019 = 11.5%



Source: Canalys estimates, March 2020

## Global performance highlights – selected vendors

**Bitdefender**

**VB rating May 2020:**  
**82.9%**

**Global 2019 market share:**  
**0.3%**

**Global 2019 Shipment growth:**  
**13.6%**

**12-month rating trend**

**✓ Highest-rated benchmark metrics**

- Product availability and supply (91.5%)
- Ease of doing business (87.6%)

**✗ Lowest-rated benchmark metrics**

- Marketing activities and lead-generation (73.5%)
- Growth through services and support (79.3%)

- Bitdefender revamped its Cloud Partner Program and MSP program in 2019 to offer well-structured incentives and opportunities to increase profitability and accelerate ROI for cloud selling partners across 150 countries. The Partner Advantage Network (PAN) program was updated to help resellers and MSPs to develop business, extend services and simplify operations to focus on selling Bitdefender solutions as per their specialization.
- It updated its Incentive Rebate Program to offer financial incentives. It also invested in a new territory account management model supported by inside sales teams to help partners expand. Investing more in an online presence will help partners compete in the market.

**Check Point**  
SOFTWARE TECHNOLOGIES LTD.

**VB rating May 2020:**  
**79.0%**

**Global 2019 market share:**  
**5.7%**

**Global 2019 Shipment growth:**  
**4.1%**

**12-month rating trend**

**✓ Highest-rated benchmark metrics**

- Usefulness of portals and electronic tools (82.7%)
- Product availability and supply (81.9%)

**✗ Lowest-rated benchmark metrics**

- Marketing and lead-generation (70.8%)
- Margin retention and overall profitability (78.2%)

- Check Point has 6,000 channel partners worldwide. It launched a new Partner Growth Program in 2020 to encourage partners to align with its priorities, such as winning new customers, growing its emerging technology bookings and selling Infinity Total Protection deals. It has focused on accelerating sales cycles, including changing the slow responsiveness to requests that has delayed sales in the past.
- It is rewarding partners for offering their own professional services with Check Point's portfolio to optimize customer experiences. In 2019, it announced a CloudGuard pay-as-you-go incentive program that allows all partners to register their customers' CloudGuard purchases via AWS and Azure marketplaces and receive long-term rewards for initial sales and ongoing engagement with customers.



## Global performance highlights – selected vendors

**VB rating May 2020:**  
**68.5%**

**Global 2019 market share:**  
**10.1%**

**Global 2019 Shipment growth:**  
**13.2%**

**12-month rating trend**

**✓ Highest-rated benchmark metrics**

- Quality of technical support (75.8%)
- Usefulness of portals and electronic tools (71.5%)

**✗ Lowest-rated benchmark metrics**

- Managing conflicts with other resellers and direct sales teams (64.3%)
- Marketing activities and lead-generation (64.5%)

Cisco has focused on improving partner profitability in cybersecurity by providing higher front-end partner margin. It invested in partner education and support with enablement platforms.

Cisco's MSLA enables partners to launch new offerings on a usage basis without upfront investment. It also allocated dedicated MSP resources to help partners build Managed Security Services. Post-paid consumption models for customers also allow partners to offer more flexibility at a lower entry cost.

Recent acquisitions, such as Duo, have added expertise and new MSPs to its partner ecosystem. Cisco was rated highly on the quality of its technical support, but with such a large ecosystem, it needs to focus on being more proactive in managing conflicts between resellers and its direct sales team.

**VB rating May 2020:**  
**84.2%**

**Global 2019 market share:**  
**0.8%**

**Global 2019 Shipment growth:**  
**9.4%**

**12-month rating trend**

**✓ Highest-rated benchmark metrics**

- Product availability and supply (90.7%)
- Ease of doing business (88.0%)

**✗ Lowest-rated benchmark metrics**

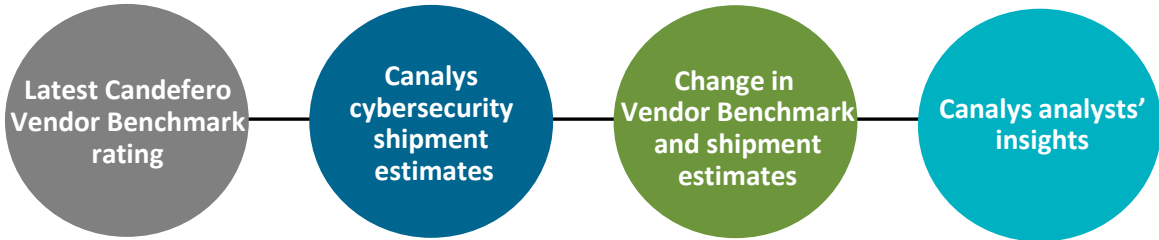
- Marketing and lead-generation (77.1%)
- Growth through services and support (81.1%)

The collaboration between direct and indirect routes to market is a key part of ESET's strategy. Following the expansion of offices in Milan and Japan in 2018, it opened a new office in Mexico to strengthen its local presence in Latin America. ESET continues to strengthen its pilot Strategic Accounts Program, which will be extended to the DACH region, France, UK and Japan in 2020, which aims to improve communications and use feedback from key enterprise accounts across the world.

ESET is focused on process simplification, training and supporting its channel business. It has over 7,000 MSPs in its program. It launched a new MSP enablement module to drive growth, as well as used local Partner Councils to collect feedback on product roadmaps, technologies and customer needs.

# Canalys Cybersecurity Leadership Matrix 2020

## About the Canalys Cybersecurity Leadership Matrix



The Cybersecurity Leadership Matrix assesses vendor performance in the channel, based on EMEA channel feedback into the Vendor Benchmark over the last 12 months, and an independent analysis of vendors, 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 10 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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