

Canalys: Seven vendors crowned “Champion” in 2020 Cybersecurity Leadership Matrix

Shanghai (China), Bengaluru (India), Singapore, Reading (UK) and Portland (US) – Tuesday, 9 June 2020

Seven cybersecurity vendors have attained Champion status in the Canalys Cybersecurity Leadership Matrix 2020. 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. All seven Champions have gained significant positive partner sentiment, according to Canalys research. These companies continue to make improvements to processes to increase simplicity and have shown commitment to growing revenue through the channel.

The total cybersecurity market grew strongly in 2019, up 12% according to Canalys estimates. “The rapid increase in remote-working due to the COVID-19 pandemic boosted security spending significantly in Q1 2020, especially in endpoint and cloud security, VPN access and identity access management, as businesses rushed to secure employees,” said Canalys Chief Analyst, Matthew Ball. “New security challenges will continue to arise, as even though organizations are returning to offices around the world, a significant number of people will continue working remotely.”

Cisco has a top security market share position and ongoing strategic focus on managed services. It allocated dedicated resources to help partners build their own managed security services and its SecureX launch will help drive MSP business by providing a unified view across its portfolio.

ESET was highly rated by partners for ease of doing business. It continued to focus on international expansion and launched a new MSP enablement module. It incorporated feedback from local Partner Councils on product roadmap technologies and customer needs.

Fortinet offered partner specializations across key areas to encourage partner-led revenue in new and existing customers. Its recent acquisition of enSilo and CyberSponse will be integrated with its Security Fabric architecture, leading to even more partner opportunities.

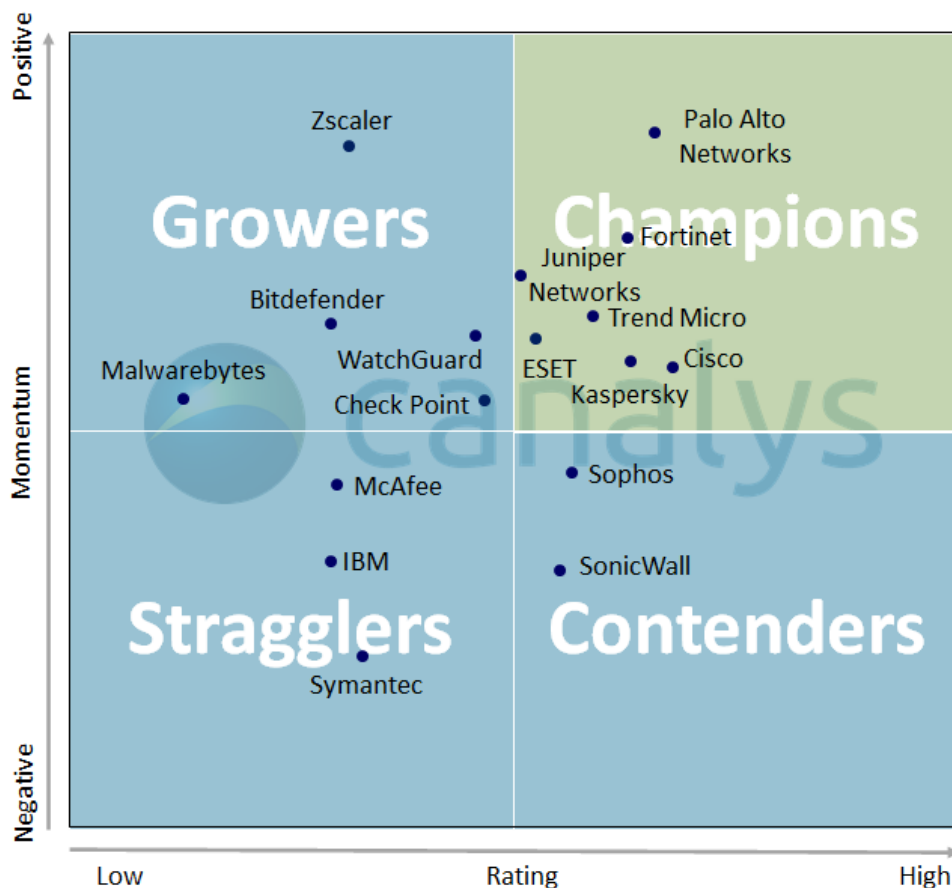
Juniper Networks made a massive investment in security in 2019, with the launch of its Connected Security strategy. Its dedicated MSP cloud program will continue its expansion in 2020.

Kaspersky continued to invest in its partner program and partner portals, by offering new billing models and dedicated support teams for MSPs. It targeted MSP recruitment and integrations with key RMM and PSA platforms.

Palo Alto Networks was one of the fastest-growing top-five cybersecurity vendors in 2019 and gained consistently high partner ratings. Its strategy to diversify its business focus has resonated with partners. It continued to invest in MSPs and CSSPs.

Trend Micro increased its investment in its channel-first strategy in 2019 and into 2020 and helped MSP growth through co-managed services and SOCaaS. Its Cloud One platform launch this year will drive SaaS business across its portfolio.

Global Cybersecurity Leadership Matrix 2020



Other leading vendors fall into three categories: Contenders, Growers and Stragglers.

Growers: Bitdefender, Check Point, Malwarebytes, WatchGuard and Zscaler have made investments in the channel that have improved partner perception over the last 12 months. Vendors in this group used varied approaches, such as launching new partner programs, mergers and acquisitions, increased MSP focus, and developing cloud-centric businesses, to maintain strong growth.

Contenders: Sophos and SonicWall are still rated highly by partners, but have faced some challenges, either in market performance or channel sentiment declines, over the last 12 months. Their strategies show potential to gain market share, but there are key challenges to overcome.

Stragglers: Symantec, IBM and McAfee have lower channel partner sentiment compared with their peers, which has fallen over the last 12 months. Vendors in this group have underperformed compared with the market average and partners have rated them lower against last year. Metrics such as lead-generation and marketing activities, generating growth through service and support, and effectiveness in their account management were rated lowest by partners.

For the rest of the year, cybersecurity spending will slow as hard-hit industries grapple with budget cuts and large projects delays. “Vendors are already making plans to support customers and the channel by offering free license extensions and financial benefits. The channel plays a key role in this situation by supporting and managing customers. Vendors that sustain and enable partners will be best-placed to move quickly to meet customer needs over the next 12 months,” said Ketaki Borade, Canalys Research Analyst.

About the Canalys Cybersecurity Leadership Matrix

This research is published to clients in the Canalys [Cybersecurity Analysis](#) service. The Cybersecurity Leadership Matrix assesses vendor performance in the channel, based on 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, via the [Candefero channels community](#), 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.

For more information, please contact:

Canalys China

Jason Low: jason_low@canalys.com +86 159 2128 2971

Nicole Peng: nicole_peng@canalys.com +86 150 2186 8330

Canalys India

Rushabh Doshi: rushabh_doshi@canalys.com +91 99728 54174

Adwait Mardikar: adwait_mardikar@canalys.com +91 96651 38668

Canalys Singapore

Sharon Hiu: sharon_hiu@canalys.com +65 9777 9015

Yih Khai Wong: yih_khai_wong@canalys.com +65 9712 7835

Canalys UK

Matthew Ball: matthew_ball@canalys.com +44 7887 950 505

Rachel Brindley: rachel_brindley@canalys.com +44 7776 201 281

Robin Ody: robin_ody@canalys.com +44 7909 864 775

Canalys USA

Ketaki Borade: ketaki_borade@canalys.com +1 650 387 5389

Alex Smith: alex_smith@canalys.com +1 650 799 4483

About Canalys

Canalys is an independent analyst company that strives to guide clients on the future of the technology industry and to think beyond the business models of the past. We deliver smart market insights to IT, channel and service provider professionals around the world. We stake our reputation on the quality of our data, our innovative use of technology and our high level of customer service.

Receiving updates

To receive media alerts directly, or for more information about our events, services or custom research and consulting capabilities, please [contact us](#) or email press@canalys.com.

[Please click here to unsubscribe](#)

Copyright © Canalys 2020. All rights reserved.
