

Nine vendors ranked as channel “Champions” in 2021 Cybersecurity Leadership Matrix

Shanghai (China), Bengaluru (India), Singapore, Reading (UK) and Portland (US) – Wednesday, 7 July 2021

Nine cybersecurity vendors achieved Champion status in Canalys’ 2021 Cybersecurity Leadership Matrix. Cisco, ESET, Fortinet, Juniper Networks, Kaspersky, Palo Alto Networks and Trend Micro reaffirmed their positions as Champions and have been joined by Check Point and Sophos. These companies have maintained or extended their strong positions in the highly competitive cybersecurity market via the channel.

The total cybersecurity market continued to grow in 2020, despite the economic fallout from the COVID-19 pandemic. Shipments increased 9.7% to US\$53.3 billion according to Canalys estimates. “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,” said Canalys Chief Analyst Matthew Ball. “This resulted in significant disruption and financial loss for many organizations at a challenging time. Channel companies are more important than ever when it comes to providing the latest solutions to secure their customers, with partner enablement by vendors being just as valuable.”

The channel is a key area of differentiation for the leading cybersecurity vendors. Each of the Champions has shown continued commitment and investment when it comes to improving processes to drive simplicity and the ease of doing business, as well as a willingness to boost growth opportunities and increase profitability for partners.

Check Point improved its partner ratings and gained Champion status after ongoing 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 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.

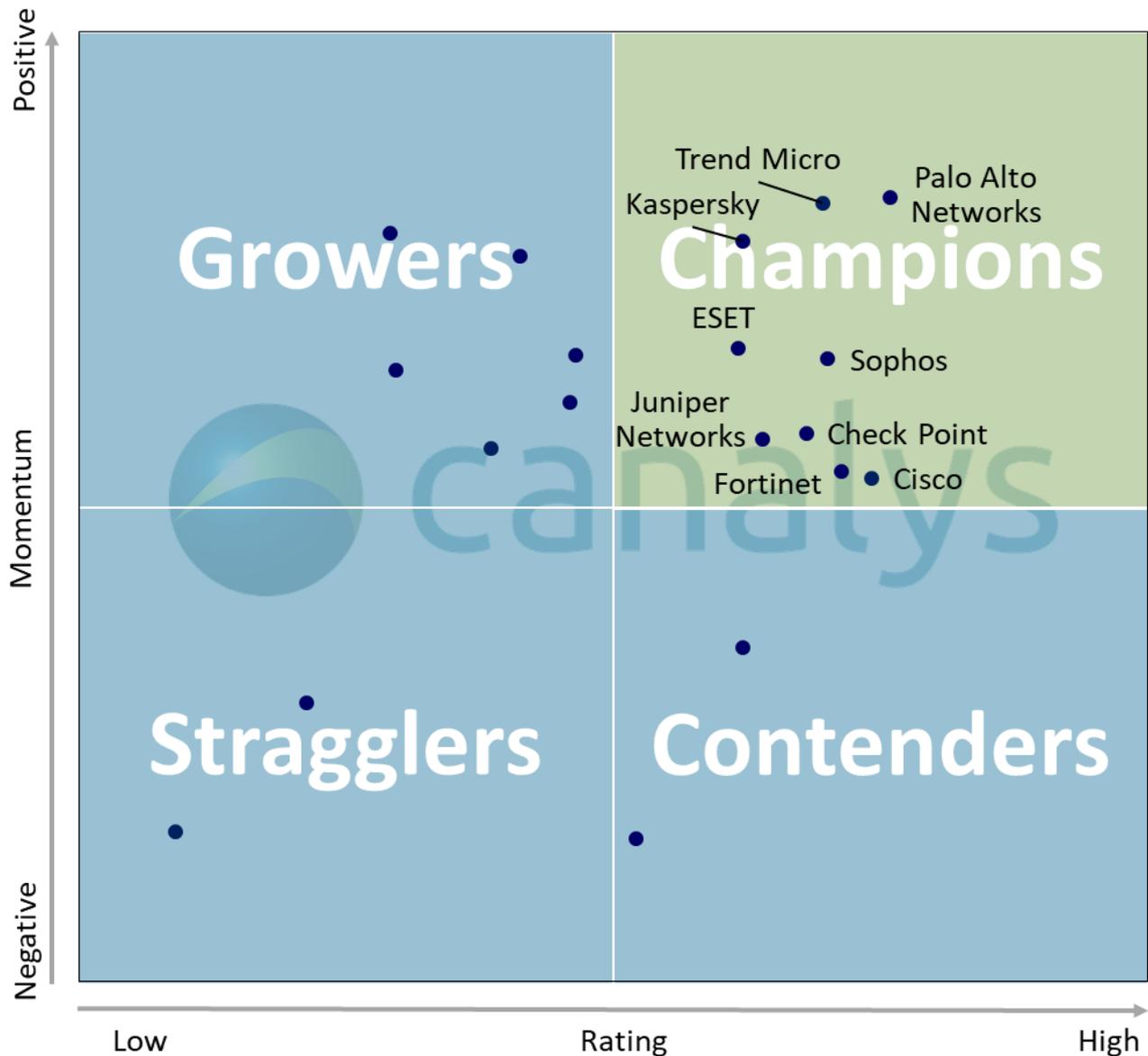
Kaspersky had the highest partner ratings in this year's Leadership Matrix, especially on pricing speed and competitiveness, as well as quality of account management. It continued to expand its MSP ecosystem, while channel initiatives remained focused on profitability, ease of doing business and support 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 shown it can support partners with different business models effectively and is a leader and partner enabler in key emerging areas, including securing cloud migration and hybrid security via cloud marketplaces.

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Cybersecurity spending will reaccelerate in 2021. Customer demand for the latest solutions is increasing as awareness has heightened following recent high-profile hacks and the surge in ransomware attacks. This, combined with increasing subscription attach rates and expansion

through acquisitions, will further boost growth rates for the leading vendors this year. Canalys' latest cybersecurity forecast predicts spending will increase by 11.4% to US\$59.3 billion in 2021. "The leading cybersecurity vendors are increasing investment in their partner programs to support the channel and capitalize on this expanding opportunity," said Blake Murray, Canalys Research Analyst. "Vendors are focusing investment on targeted rebates and incentives as well as improving deal registration to secure renewals and drive sales of new solutions. Enhancing partner portals, increasing training, adding more specializations, developing new routes-to-market via digital marketplaces and transitioning to managed services and consumption-based models are also priorities."

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. It also considers independent analysis of vendors, including 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 on the 12 most important areas of channel management.

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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.

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