

# Canalys Global Cybersecurity Leadership Matrix 2021

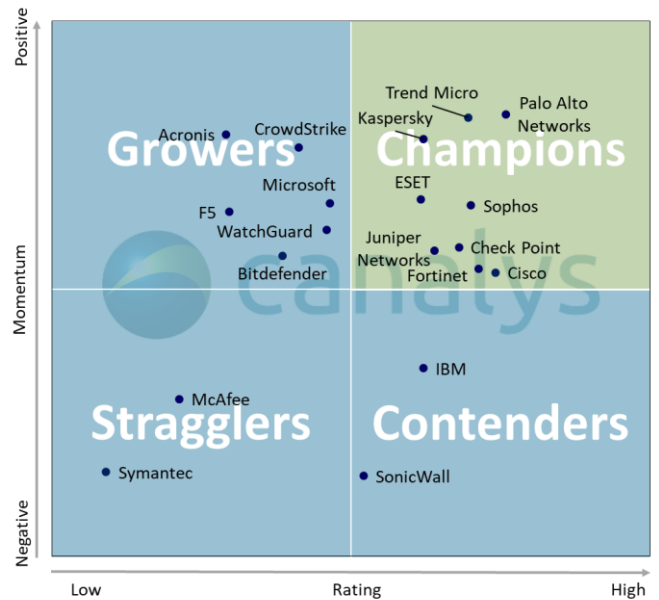
## Summary

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.

# Canalys Global Cybersecurity Leadership Matrix 2021

## 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.

# Canalys Global Cybersecurity Leadership Matrix 2021

## Summary

**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.

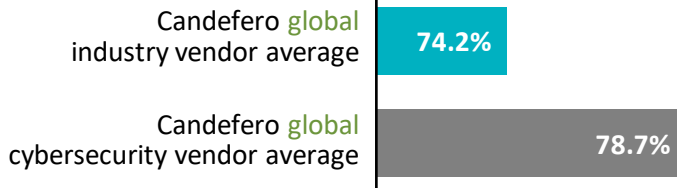
# Canalys Global Cybersecurity Leadership Matrix 2021



# Canalys Global Cybersecurity Leadership Matrix 2021

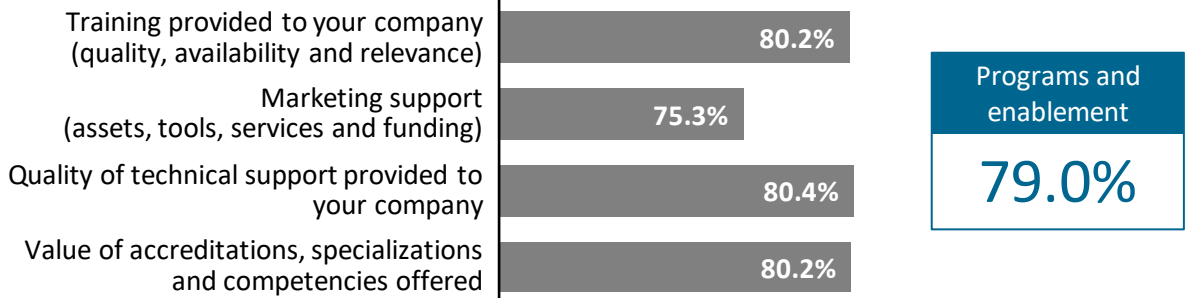
## Candefero Vendor Benchmark indicators

**Candefero Vendor Benchmark:** Global aggregated channel feedback scores for July 2020 to June 2021

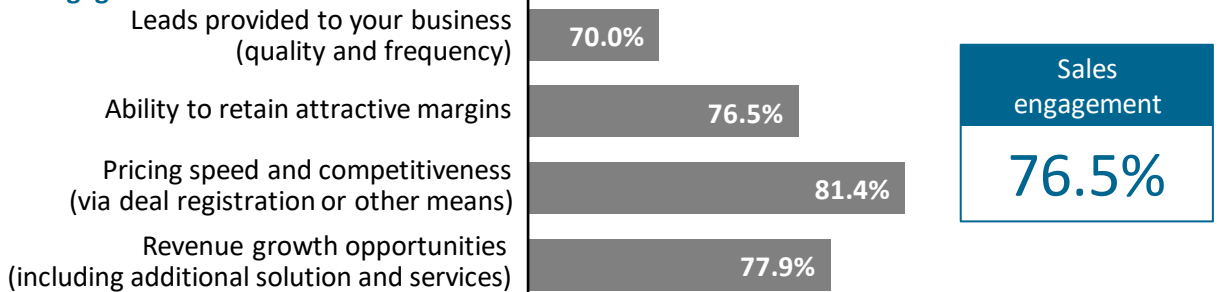


**Candefero Vendor Benchmark:** Global aggregated channel feedback scores by metric for cybersecurity vendors only for July 2020 to June 2021

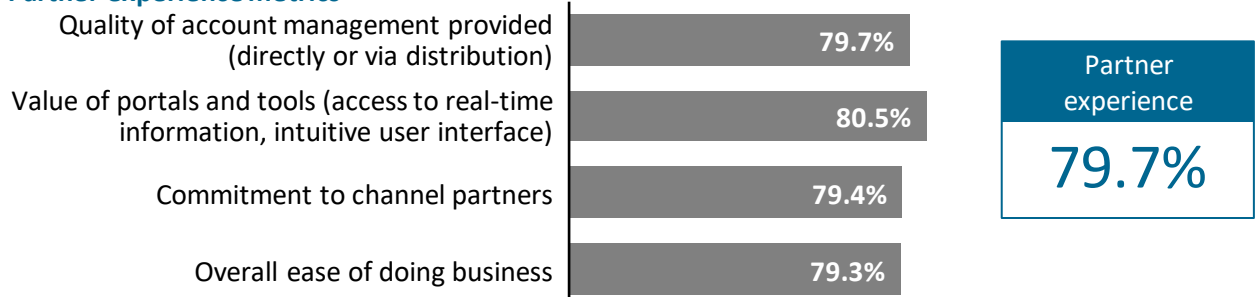
### Programs and enablement metrics



### Sales engagement metrics



### Partner experience metrics

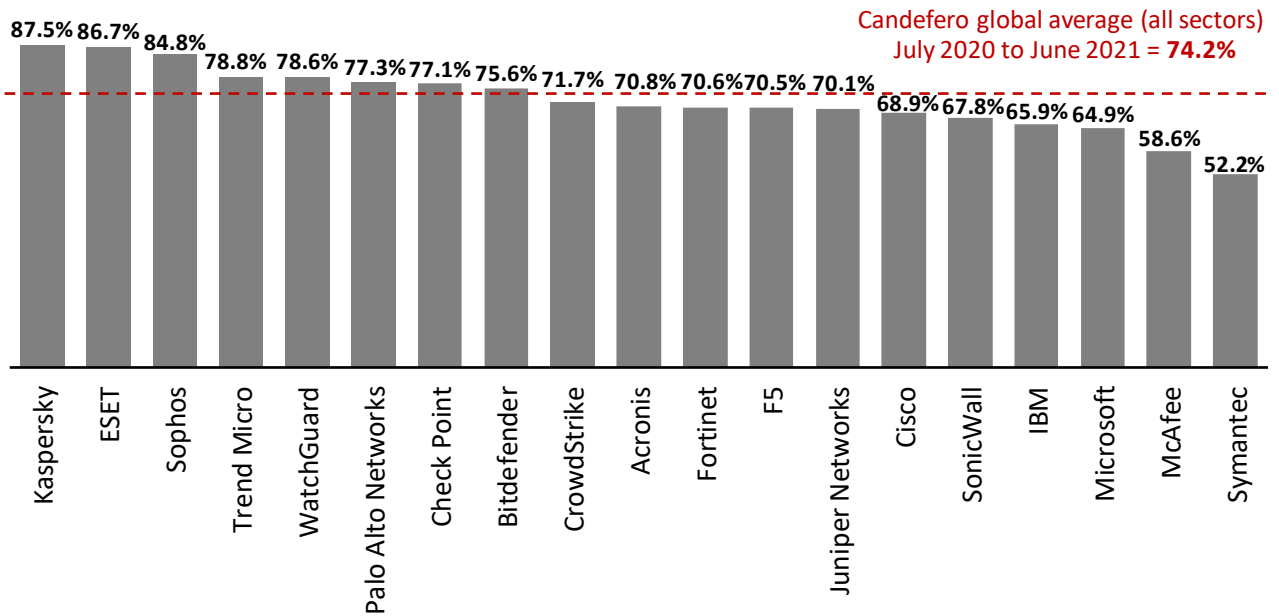


Source: Candefero Vendor Benchmark, June 2021

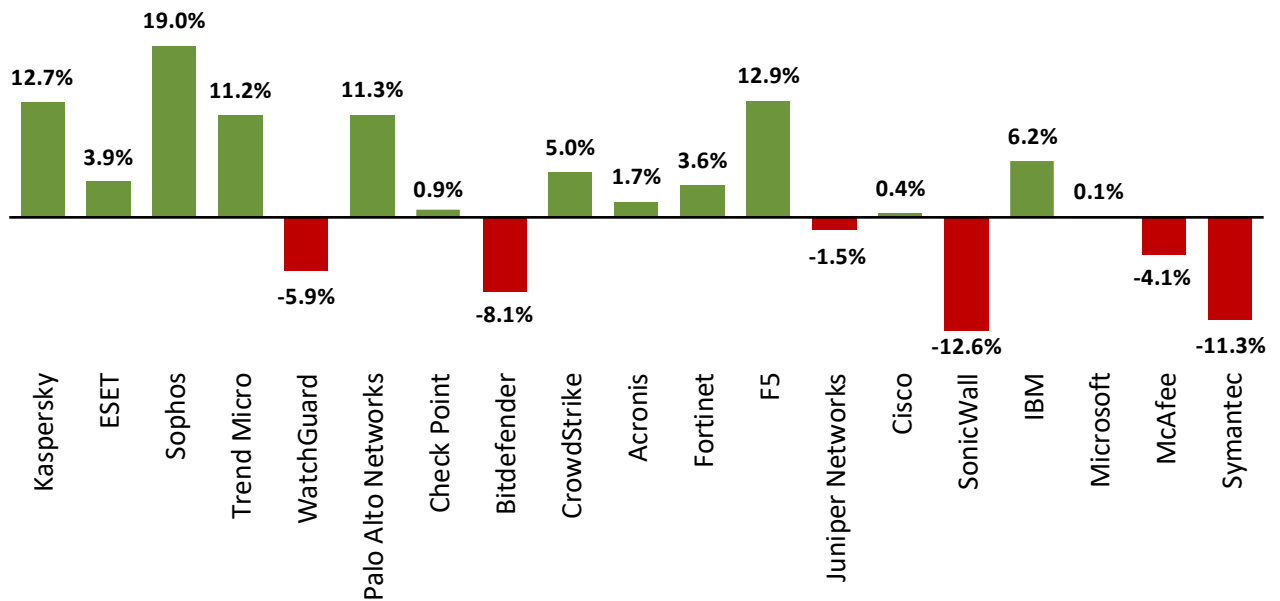
# Canalys Global Cybersecurity Leadership Matrix 2021

## Candefero Vendor Benchmark cybersecurity indicators

**Candefero Vendor Benchmark: Global channel feedback scores by vendor for July 2020 to June 2021**



**Candefero Vendor Benchmark: Global channel feedback change from 12 months ago by vendor for July 2020 to June 2021**

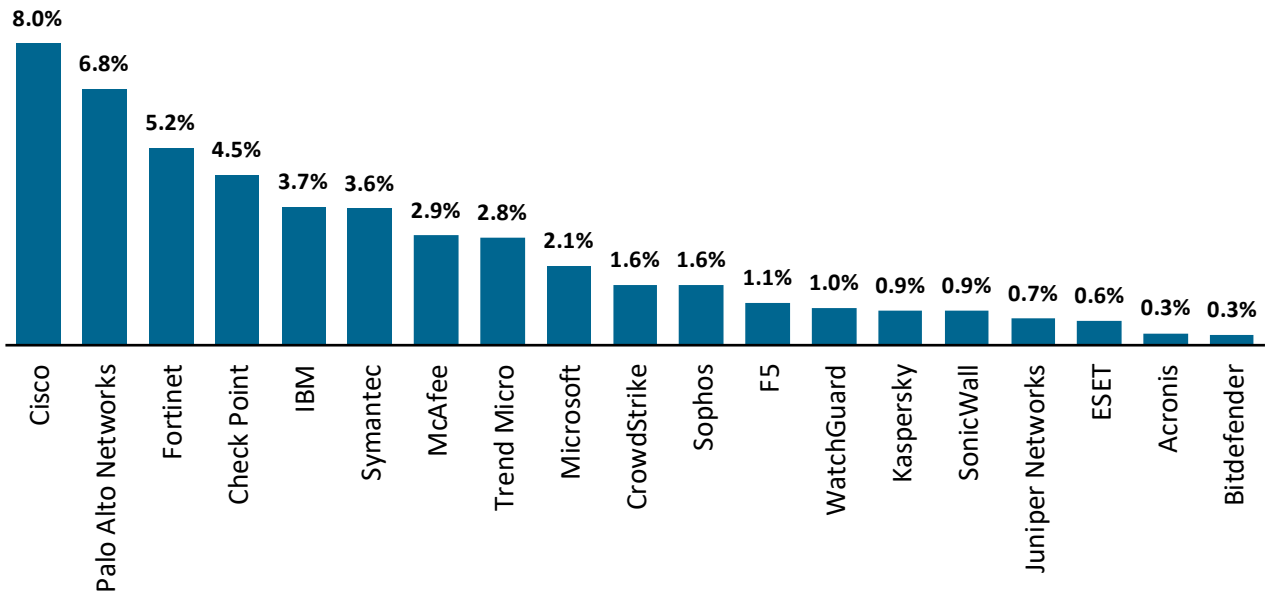


Source: Candefero Vendor Benchmark, June 2021

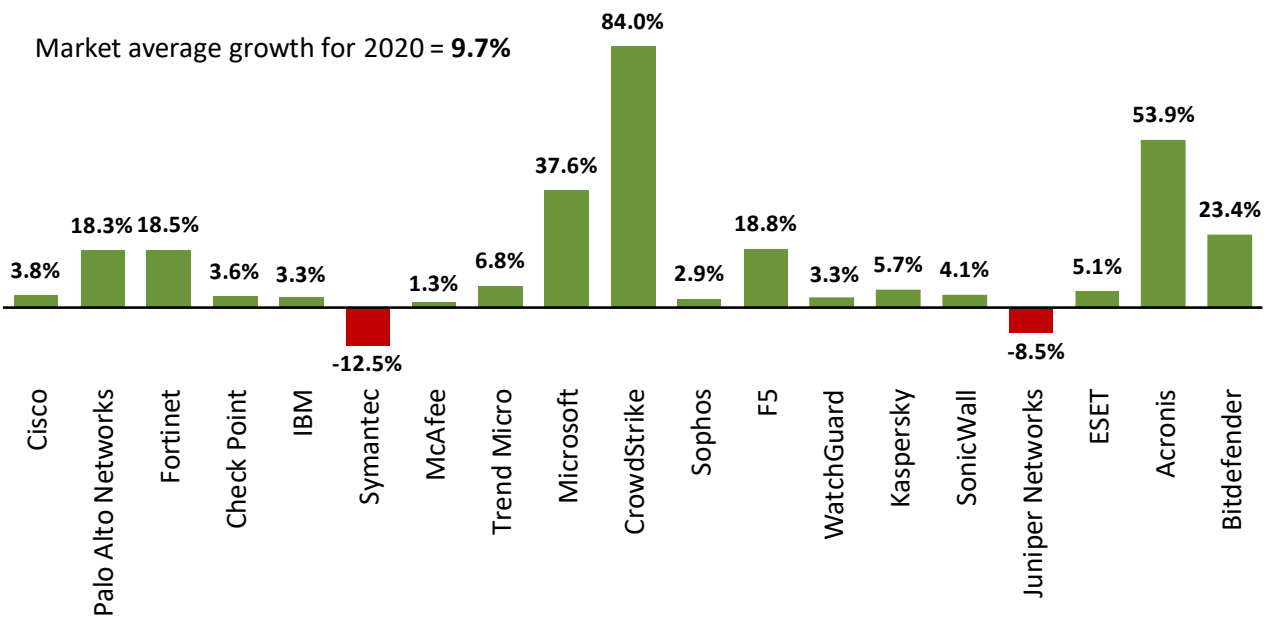
# Canalys Global Cybersecurity Leadership Matrix 2021

## Canalys cybersecurity vendor shipment indicators

**Canalys cybersecurity estimates: Global market share by vendor 2020**  
(vendors covered in the Cybersecurity Leadership Matrix only)



**Canalys cybersecurity estimates: Global shipment value growth by vendor 2020**  
(vendors covered in the Cybersecurity Leadership Matrix only)



Source: Canalys estimates, March 2021

## Global performance highlights – selected vendors

# Acronis

**✓ Highest-rated Vendor Benchmark metrics**

- Pricing speed and competitiveness (77.1%)
- Training provided (72.9%)
- Quality of account management provided (72.4%)
- Overall ease of doing business (72.4%)

Vendor Benchmark rating	
YTD 2021 rating: <b>70.8%</b>	Rating change 
Cybersecurity market presence	
2020 market share: <b>0.3%</b>	2020 shipment growth: <b>53.9%</b>

- Acronis** made significant enhancements to its 2021 #CyberFit partner program that reflect its growing focus on as-a-service business, and unifies its approach to both its service providers and resellers. It added Partner #Cyberfit scorecards to measure performance beyond just revenue, and new financial and support benefits, including quarterly performance rebates and lead sharing. It also introduced dedicated marketing account managers for Platinum partners, a new partner community forum, and allocated Partner Success Managers to all service providers. Overall, it has 50,000 partners.
- Key initiatives include the recruitment and enablement of cloud-focused distributors, which increased its service provider base by over 30% in 2020. It developed APIs for distributor marketplaces and RMM integration for customer lifecycle management. It also acquired Nyotron and launched Acronis Detect and Response, and is establishing an R&D center and partner enablement office in Israel.

# Bitdefender®

**✓ Highest-rated Vendor Benchmark metrics**



- Ability to retain attractive margins (79.1%)
- Value of portals and tools (78.6%)
- Training provided to your company (78.6%)
- Commitment to channel partners (77.3%)



Vendor Benchmark rating	
YTD 2021 rating: <b>75.6%</b>	Rating change 
Cybersecurity market presence	
2020 market share: <b>0.3%</b>	2020 shipment growth: <b>23.4%</b>

- Bitdefender** introduced enhancements to its Partner Advantage Network program in 2021. It added protection for incumbency status to drive renewals, new revenue opportunities with the launch of EDR, cloud workload security and MDR offerings, a centralized partner status dashboard, and access to lead generation programs. It also launched a new e-learning platform with sales and technical tutorials, and sales training, as well as Starter Pack, a dedicated tool to accelerate the onboarding of new partners.
- MSPs are a key focus for Bitdefender. Over the last 12 months it has strengthened its MSP enablement processes through its dedicated MSP Partner Program, which had major updates in 2019. It has since added automated marketing campaigns, more dedicated training and technical resources, as well as implemented feedback from its MSP Advisory Board to guide its go-to-market strategy. Bitdefender grew its active partners by 21% in 2020. Overall, it has approximately 36,000 partners enrolled.




## Global performance highlights – selected vendors

 <p><b>Check Point</b> SOFTWARE TECHNOLOGIES LTD.</p>	<b>Vendor Benchmark rating</b>	
<p>✓ <b>Highest-rated Vendor Benchmark metrics</b></p> <ul style="list-style-type: none"> <li>Quality of technical support provided (81.1%)</li> <li>Quality of account management provided (80.8%)</li> <li>Commitment to channel partners (80.4%)</li> <li>Training provided to your company (80.1%)</li> </ul>	<p>YTD 2021 rating: <b>77.1%</b></p>	<p>Rating change </p>
<b>Cybersecurity market presence</b>		
<ul style="list-style-type: none"> <li><b>Check Point's</b> 2021 Partner Growth Program is focused on investing in driving partners' profitable growth, with deal registration and greater discounts on new customer and emerging technology wins. It has increased investment through MDF and SPIFs, such as the Cloudmania program. It also introduced cyber learning credits and discounts for partners using its solutions in-house. These further enhanced its relaunched 2020 program, and builds on its long-standing commitment to the channel.</li> <li>Over the last 12 months it has focused on partner collaboration via the Engage app, which connects with field teams and experts, and its new CheckMates online community. It also expanded its professional services certification program, and launched Quantum Spark to push into the SMB market. Cloud marketplaces is a strategic focus area for Check Point, especially with AWS, Azure and Google. This was extended with the Distribution Cloud Marketplace program via Ingram Micro and Arrow.</li> </ul>		
<p>2020 market share: <b>4.5%</b></p>		<p>2020 shipment growth: <b>3.6%</b></p>

	<b>Vendor Benchmark rating</b>	
<p>✓ <b>Highest-rated Vendor Benchmark metrics</b></p> <ul style="list-style-type: none"> <li>Quality of technical support provided (75.5%)</li> <li>Training provided to your company (71.4%)</li> <li>Value of accreditations and specializations (75.5%)</li> <li>Value of portals and tools (71.1%)</li> </ul>	<p>YTD 2021 rating: <b>68.9%</b></p>	<p>Rating change </p>
<b>Cybersecurity market presence</b>		
<ul style="list-style-type: none"> <li><b>Cisco</b> is consolidating existing partner programs into a unified framework to enable and accelerate the transition to SaaS, managed services and cloud solutions, as well as shifting lifecycle management from product- to customer-centric. The New Cisco Partner Program is designed around four key partner roles: Integrator for resell and deployment, Provider for as-a-service and managed services, Developer with DevNet specializations, and Advisor for pre- and post-sales specialists. Benefits are linked to investments across each of these roles, while its Gold brand has been extended across each one.</li> <li>Its security business was restructured to focus on three key areas: SASE, Zero Trust and XDR. This is part of an initiative to simplify operations and consolidate its portfolio under the Cisco Secure brand. SecureX is a key platform for Cisco to integrate its portfolio and drive MSP use. Its go-to-market model was realigned, with security and SD-WAN specialist sales teams integrated within its channel unit.</li> </ul>		
<p>2020 market share: <b>8.0%</b></p>		<p>2020 shipment growth: <b>3.8%</b></p>


## Global performance highlights – selected vendors



**✓ Highest-rated Vendor Benchmark metrics**

- Quality of technical support provided (90.5%)
- Quality of account management provided (89.7%)
- Commitment to channel partners (89.2%)
- Overall ease of doing business (88.8%)


**Vendor Benchmark rating**

<b>YTD 2021 rating:</b> <span style="font-size: 24pt; font-weight: bold;">86.7%</span>	<b>Rating change</b> 
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**Cybersecurity market presence**

<b>2020 market share:</b> <span style="font-size: 24pt; font-weight: bold;">0.6%</span>	<b>2020 shipment growth:</b> <span style="font-size: 24pt; font-weight: bold;">5.1%</span>
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- **ESET's** investment in penetrating enterprise accounts continued over the last 12 months. In addition to strengthening its Strategic Accounts Program, ESET focused on partner training and the rollout of a global CRM system for new and renewal deal registration. It also released Global Partner Program Guidelines to align best practices. These combined activities resulted in higher customer retention rates. A key initiative is ESET Hub, which will consolidate its customer, MSP and reseller portals.
- It has contractual relationships with 100,000 partners globally. Key benefits of its partner program include dedicated local sales, technical and marketing support. Its Global Managed Service Provider Program has 7,000 MSPs signed-up, which offers daily billing with monthly invoicing, volume discounts, and integration with RMM platforms. It released EMA2, its new MSP centric marketplace platform in 2021. This extends access to its more advanced portfolio and integrates with third party marketplaces.



**✓ Highest-rated Vendor Benchmark metrics**

- Pricing speed and competitiveness (75.5%)
- Overall ease of doing business (73.3%)
- Quality of technical support provided (73.3%)
- Training provided to your company (72.3%)

**Vendor Benchmark rating**


<b>YTD 2021 rating:</b> <span style="font-size: 24pt; font-weight: bold;">70.6%</span>	<b>Rating change</b> 
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**Cybersecurity market presence**

<b>2020 market share:</b> <span style="font-size: 24pt; font-weight: bold;">5.2%</span>	<b>2020 shipment growth:</b> <span style="font-size: 24pt; font-weight: bold;">18.5%</span>
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- **Fortinet** rolled-out its Engage 2.0 Partner Program update in 2021 to address changing market needs and further enable partners with resources to meet customer requirements. Additions to the program include new specializations, updated NSE training courses to meet compliance requirements, as well as new consumption models and enhanced cloud partner benefits,. New specializations include Zero Trust Access, Operational Technology and Security Operations. This follows the addition of Secure SD-WAN, Data Center, Adaptive Cloud Security, and LAN Edge and SD-Branch in 2020.
- Partners can engage with the program with different business models, including integrator, MSSP or cloud partner. Updates to its consumption models and additional benefits target MSSPs. It added consumption models for FortiSIEM, FortiEDR, and FortiSOAR, as well as opened access to its Engage Select Cloud Business Model, including FortiCWP, FNDN, and discounts on its flexible licensing models.

## Global performance highlights – selected vendors



**✓ Highest-rated Vendor Benchmark metrics**

- Value of accreditations and competencies (72.8%)
- Quality of technical support (72.5%)
- Value of portals and tools (72.4%)
- Commitment to channel partners (72.4%)


Vendor Benchmark rating

<b>YTD 2021 rating:</b> <span style="font-size: 24pt; font-weight: bold;">70.1%</span>	<b>Rating change</b> <span style="font-size: 24pt; color: green;">↓</span>
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Cybersecurity market presence

<b>2020 market share:</b> <span style="font-size: 24pt; font-weight: bold;">0.7%</span>	<b>2020 shipment growth:</b> <span style="font-size: 24pt; font-weight: bold;">-8.5%</span>
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- Juniper Networks'** Connected Security strategy provides partners with opportunities to sell into existing networking accounts and accelerate services growth. It strengthened its Partner Advantage program by simplifying access to marketing assets on Partner Marketing Central, as well as improving deal registration with renewals and services management. It introduced the Growth Rewards Program to incentivize solution selling by up to 15%, launched Digital Assistant to provide additional AI-driven partner support, and rolled-out its new Champion program to drive partner certifications.
- Cybersecurity initiatives over the last 12 months focused on SRX installed base refresh, driving high growth areas such as APT, and introducing playbooks for edge, cloud and data center deployments. It also bundled a one-year free access to its Premium Security Software, including threat intelligence and encrypted traffic analysis, with every basic security service subscription.



**✓ Highest-rated Vendor Benchmark metrics**

- Pricing speed and competitiveness (91.6%)
- Quality of account management (89.8%)
- Overall ease of doing business (89.2%)
- Training provided to your company (88.7%)

Vendor Benchmark rating

<b>YTD 2021 rating:</b> <span style="font-size: 24pt; font-weight: bold;">87.5%</span>	<b>Rating change</b> <span style="font-size: 24pt; color: green;">↑</span>
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Cybersecurity market presence

<b>2020 market share:</b> <span style="font-size: 24pt; font-weight: bold;">0.9%</span>	<b>2020 shipment growth:</b> <span style="font-size: 24pt; font-weight: bold;">5.7%</span>
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- Kaspersky's** United Partner program focuses on profitability, ease of doing business, and support for partners. In the last 12 months, it introduced rebate accelerators of up to 10%, simplified deal registration and rebate processes, increased its channel support team, updated specializations, and launched a dedicated enterprise program. Overall, its number of certified partners grew 35%, deal registration revenue increased 33%, and rebates were paid out four times faster. It plans to launch bundled SKUs, drive on-premises to cloud migration, and launch Learning Paths on its Partner Portal.
- Developing its MSP business is a strategic priority. The number of active MSPs in its program increased 62%, while revenue grew over 100%. Its MSP specialization provides a range of benefits for partners including dedicated partner account managers and a licence management portal, which will add instant license delivery. In 2020, it launched EDR Optimum and MDR, as well as aggregated tier-based pricing.

## Global performance highlights – selected vendors

**palooalto**  
NETWORKS

**✓ Highest-rated Vendor Benchmark metrics**

- Quality of technical support provided (82.9%)
- Revenue growth opportunities (82.9%)
- Commitment to channel partners (81.4%)
- Pricing speed and competitiveness (80.0%)

**Vendor Benchmark rating**

YTD 2021 rating: <b>77.3%</b>	Rating change 
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**Cybersecurity market presence**

2020 market share: <b>6.8%</b>	2020 shipment growth: <b>18.3%</b>
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- **Palo Alto Networks** launched NextWave 3.0 in 2021 to accelerate partner development through differentiation with new specializations, as well as expanding growth and profitability opportunities. The program added specializations, rebates and discounts on registered deals for Prisma SASE, Prisma Cloud, and Cortex XDR/XSOAR. Future initiatives will focus on supporting large global deals by creating a new Global Diamond partner level, as well as further differentiation with more specializations, and increased incentives to target the land, expand, adopt and renew stages of the customer lifecycle.
- Overall, it works with more than 6,000 partners, including over 200 MSP Innovators, which doubled their managed services bookings in FY 2020 following the launch of its Managed Services Program. It has since enhanced the program with automated quoting capabilities and launched a CSP dashboard for usage reporting. It also introduced credit-based licensing for its firewall-as-a-platform software.

**SOPHOS**

**✓ Highest-rated Vendor Benchmark metrics**

- Commitment to channel partners (90.0%)
- Quality of account management provided (89.1%)
- Training provided to your company (88.1%)
- Value of portals and tools (88.1%)

**Vendor Benchmark rating**

YTD 2021 rating: <b>84.8%</b>	Rating change 
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**Cybersecurity market presence**

2020 market share: <b>1.6%</b>	2020 shipment growth: <b>2.9%</b>
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- **Sophos** launched its new Global Partner Program in July 2020 to optimize partner profitability and deliver consistent engagement. Initiatives this year include expanding deal registration and incumbency, partner training, and co-brandable marketing campaigns. It expanded partner help desks to respond to RFPs, wireless planning, competitive queries, and firewall migration requests. Other initiatives includes a new library of how-to, configuration and trouble-shooting videos, and interactive support community and live chat for support.
- Its Sophos Central partner dashboard, RMM and PSA integrations, and the introduction of 18x revenue multiplier for MSP sales, highlights its focus on MSP enablement and growth. A refreshed Cloud Security specialization also provides new sales tools, training and incentives to support partners' cloud businesses. Overall, Sophos has 60,000 partners, including more than 12,500 MSPs.

## Global performance highlights – selected vendors

**TREND  
MICRO™**

✓ **Highest-rated Vendor Benchmark metrics**

- Pricing speed and competitiveness (81.6%)
- Commitment to channel partners (80.0%)
- Quality of technical support provided (79.0%)
- Value of portals and tools (79.5%)

Vendor Benchmark rating	
YTD 2021 rating: <b>78.8%</b>	Rating change 
Cybersecurity market presence	
2020 market share: <b>2.8%</b>	2020 shipment growth: <b>6.8%</b>

- Trend Micro** accelerated its transition to a SaaS-based model over the last 12 months, as part of a cloud-first approach, with its Cloud One, Vision One and Apex One platforms. By the end of 2020, it had enabled 53% of partners to sell its SaaS portfolio, of which more than half had moved to a SaaS-only model. It added cloud assessment tools and Vision One credit licensing, revamped its partner portal, increased incumbency rebates, and extended deal registration. Overall, it has 25,000 active partners.
- It made significant progress in recruiting and enabling MSPs via its Hello MSP distributor campaign and the launch of SOCaaS. Trend Micro is also a leader in securing customer’s cloud workloads via partners. It has simplified procurement and deployment through cloud marketplaces, and was the first ISV to enable committed consumption on AWS Marketplace for partners. Key initiatives include increasing customer success services for partners, including white-label best practice and cloud risk assessments.

**W**atchGuard

✓ **Highest-rated Vendor Benchmark metrics**

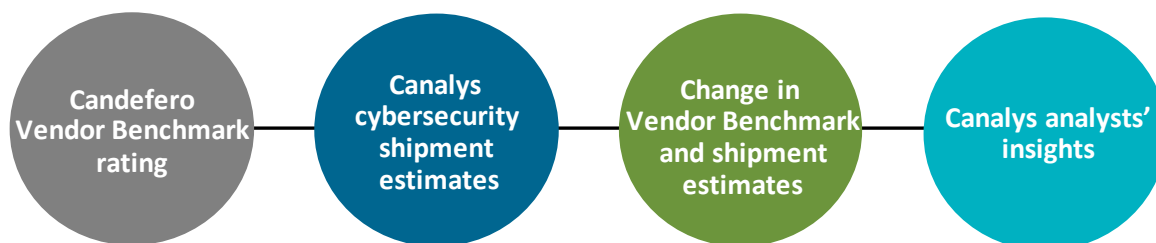
- Commitment to channel partners (82.2%)
- Quality of technical support provided (80.6%)
- Pricing speed and competitiveness (80.0%)
- Ability to retain attractive margins (80.0%)

Vendor Benchmark rating	
YTD 2021 rating: <b>78.6%</b>	Rating change 
Cybersecurity market presence	
2020 market share: <b>1.0%</b>	2020 shipment growth: <b>3.3%</b>

- WatchGuard** reinvests between 30% and 40% of its annual revenue in its channel program each year. Over the last 12 months, its partner ecosystem has grown more than 50% following the acquisition and integration of Panda Security. Overall, it now has more than 17,000 active partners. Endpoint Security was added as a fourth specialization to its WatchGuardONE partner program, in addition to Network Security, MFA and Secure Wi-Fi. Nearly 35% of its partners have attained more than one specialization.
- It launched the WatchGuard Cloud multi-tenant management and reporting platform for MSPs, providing policy templates for repeatable Firebox and AuthPoint deployments. This is supported by its FlexPay program for automated monthly billing covering network security hardware and services. Other options include fixed-term contracts and MSSP pre-paid points. It also developed APIs for distributors to integrate and support the management of new orders and existing subscriptions.

# Canalys Cybersecurity Leadership Matrix 2021

## 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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