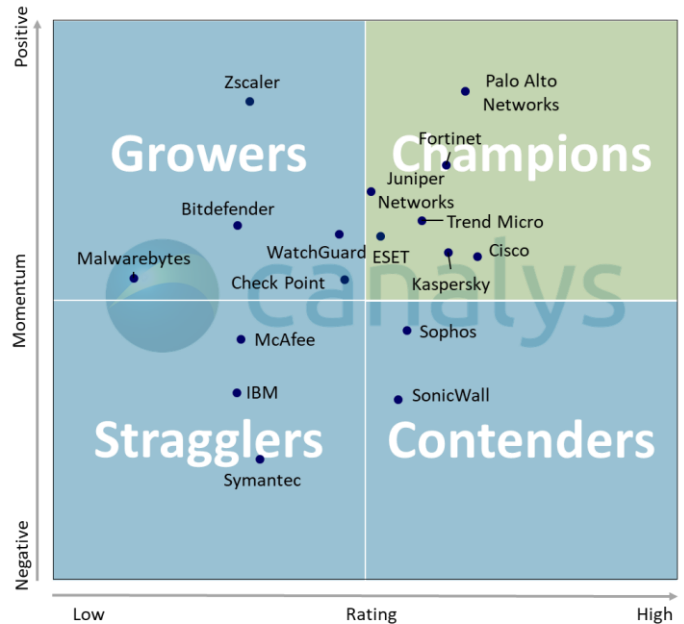# Canalys Global Cybersecurity Leadership Matrix 2020

Summary

The importance of cybersecurity has grown as organizations respond to the COVID-19 pandemic. The rapid mass roll-out of remote-working initiatives and the acceleration of other business continuity measures, combined with targeted COVID-19 phishing campaigns has resulted in organizations being more vulnerable. Workforces will remain highly decentralized for the short- to medium-term, where possible, as organizations implement flexible working practices. This will create new cybersecurity threats and challenges. Vendors that can support and enable their channel partners to capitalize on these constantly changing dynamics will be best placed to succeed over the next 12 months.

Cisco, **ESET**, **Fortinet**, **Juniper Networks**, **Kaspersky**, **Palo Alto Networks** and **Trend Micro** were identified as the channel Champions in the 2020 edition of the **Canalys Global Cybersecurity Leadership Matrix**. Unique feedback from channel partners, Canalys quarterly shipment estimates and analyst insight were used to

Global Cybersecurity Leadership Matrix
May 2020

determine the position of vendors in the highly competitive cybersecurity ecosystem. The Leadership Matrix considered 17 cybersecurity vendors to assess their channel and market performance over the last 12 months, as well as their leadership and change capabilities.

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.

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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.

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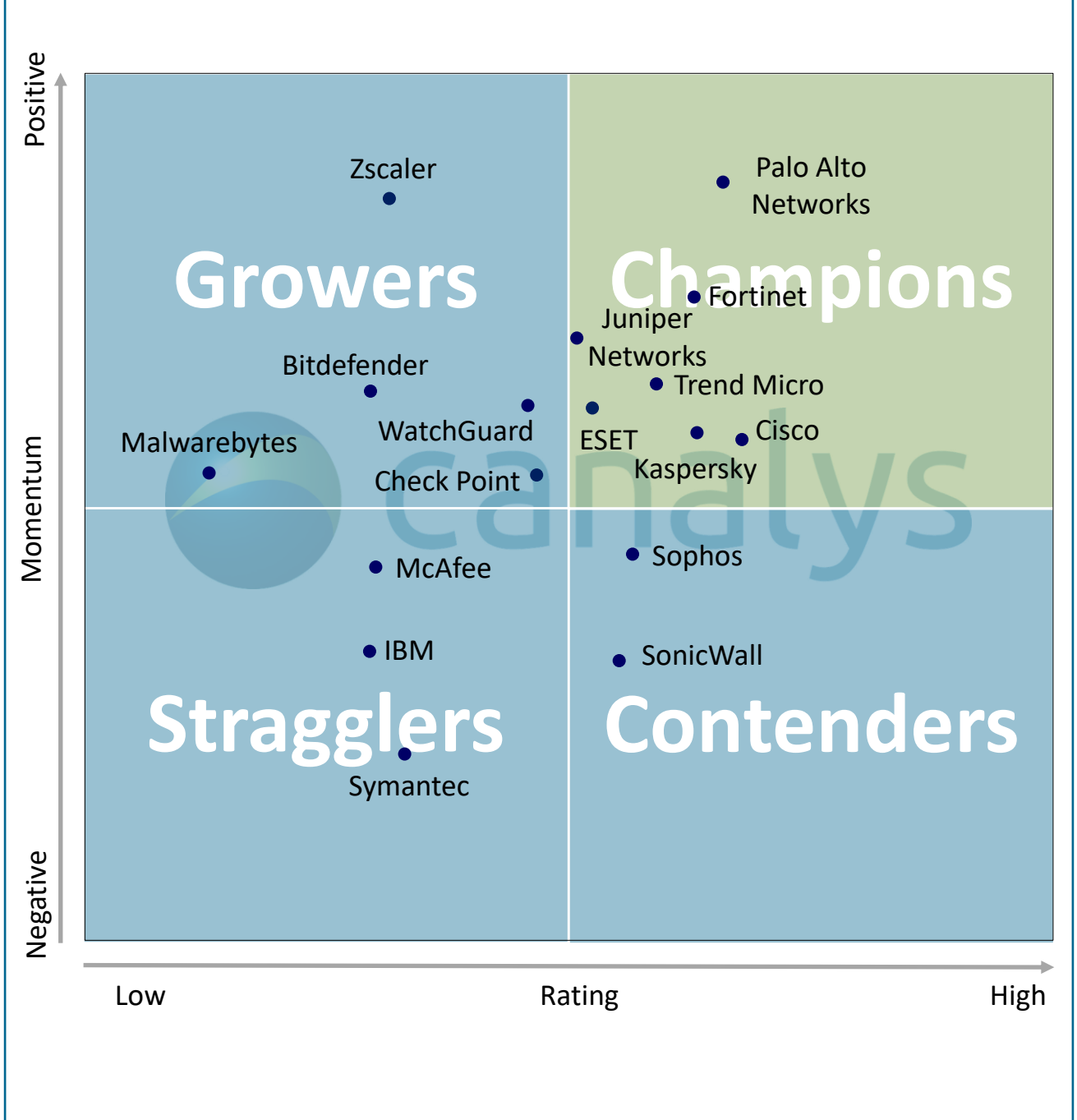
Stragglers are vendors that have lower partner sentiment compared with their peers and have suffered a decline over the last 12 months. Vendors in this segment have underperformed compared with the market average and lost share. Their channel strategies or future engagement with partners shows some signs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

Positive

Negative

Momentum

Growers

Zscaler

Bitdefender

Malwarebytes

WatchGuard

Check Point

Champions

Palo Alto
Networks

Fortinet

Juniper
Networks

Trend Micro

ESET

Cisco

Kaspersky

Stragglers

McAfee

IBM

Symantec

Contenders

Sophos

SonicWall
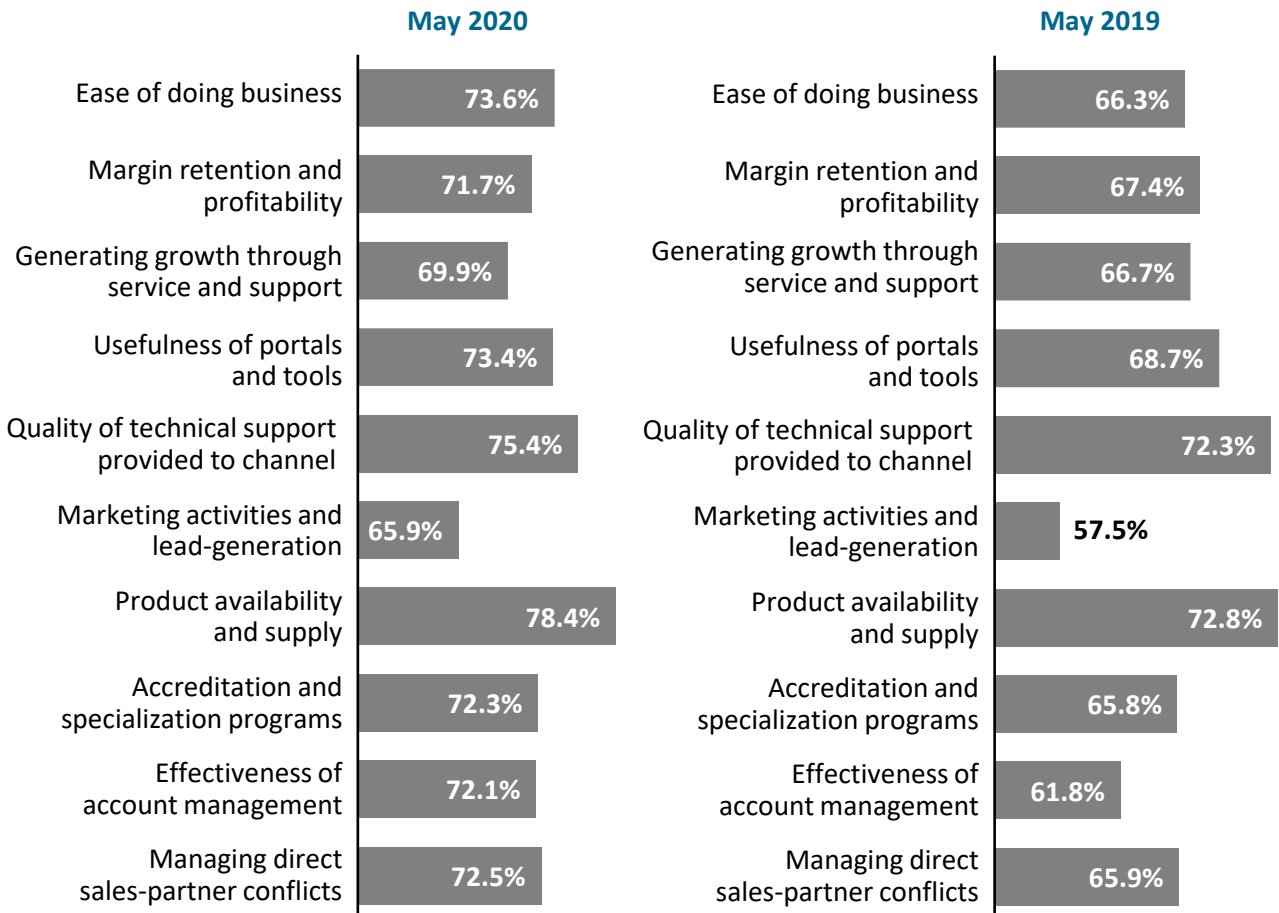
Low

Rating

High

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Canalys Global Cybersecurity Leadership Matrix 2020

Candefero Vendor Benchmark indicators

Candefero Vendor Benchmark: aggregated channel feedback scores

May 2020

Candefero global industry average	66.3%
Candefero global cybersecurity average	72.5%

May 2019

Candefero global industry average	65.7%
Candefero global cybersecurity average	66.5%

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

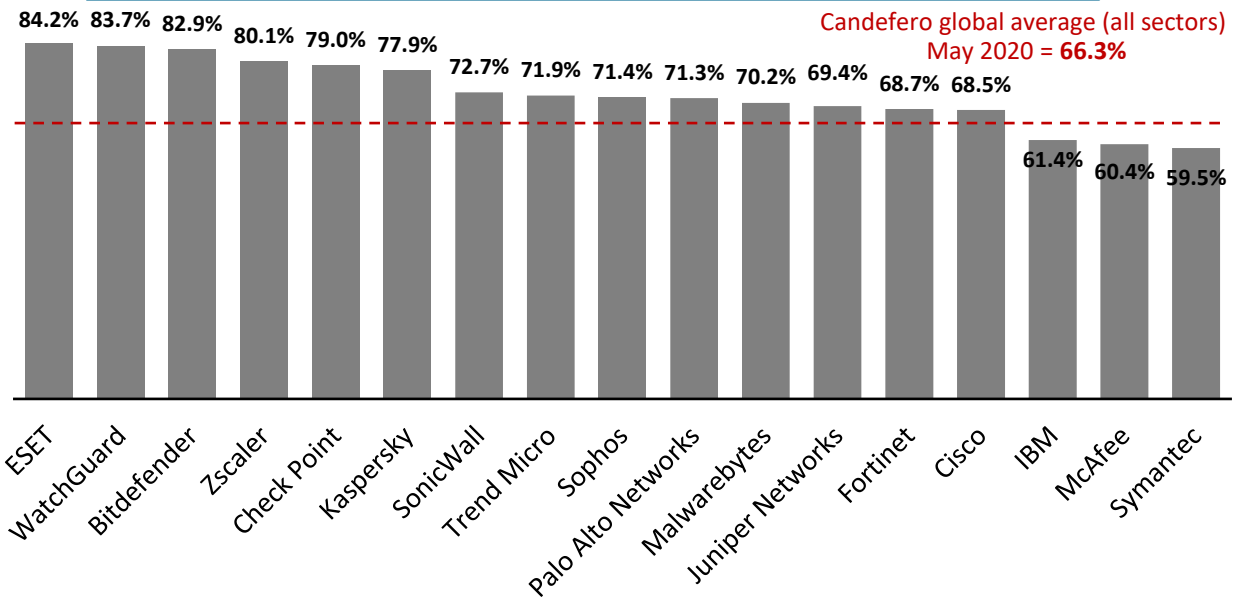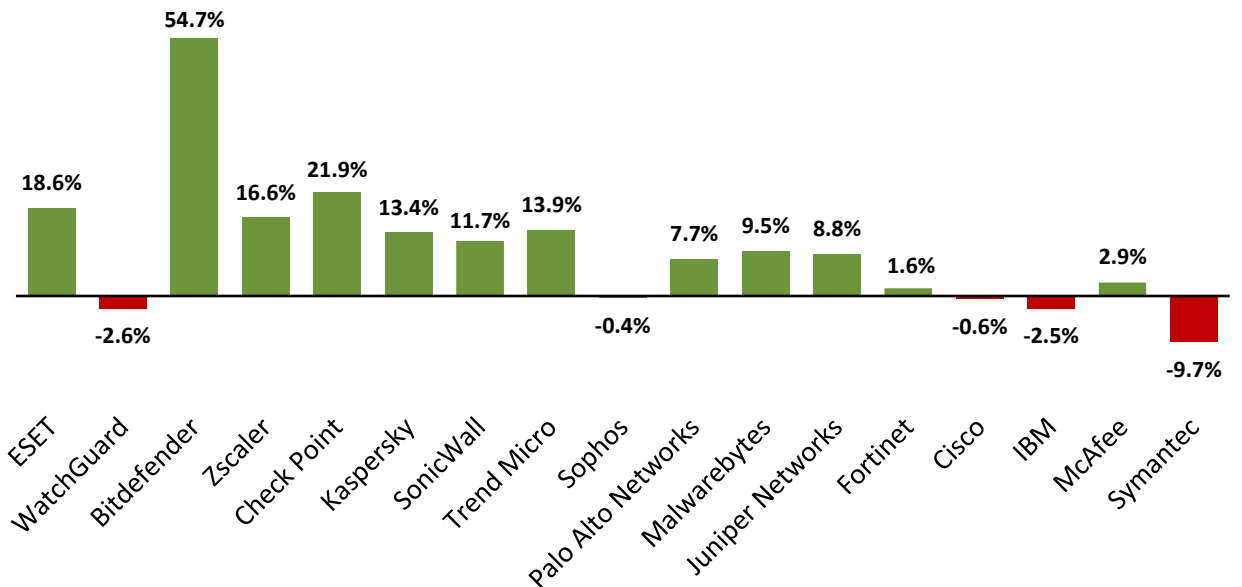| Metric	May 2020	May 2019
Ease of doing business	73.6%	66.3%
Margin retention and profitability	71.7%	67.4%
Generating growth through service and support	69.9%	66.7%
Usefulness of portals and tools	73.4%	68.7%
Quality of technical support provided to channel	75.4%	72.3%
Marketing activities and lead-generation	65.9%	57.5%
Product availability and supply	78.4%	72.8%
Accreditation and specialization programs	72.3%	65.8%
Effectiveness of account management	72.1%	61.8%
Managing direct sales-partner conflicts	72.5%	65.9%

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 global average (all sectors) May 2020 = **66.3%**

Vendor	Score
ESET	84.2%
WatchGuard	83.7%
Bitdefender	82.9%
Zscaler	80.1%
Check Point	79.0%
Kaspersky	77.9%
SonicWall	72.7%
Trend Micro	71.9%
Sophos	71.4%
Palo Alto Networks	71.3%
Malwarebytes	70.2%
Juniper Networks	69.4%
Fortinet	68.7%
Cisco	68.5%
IBM	61.4%
McAfee	60.4%
Symantec	59.5%

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

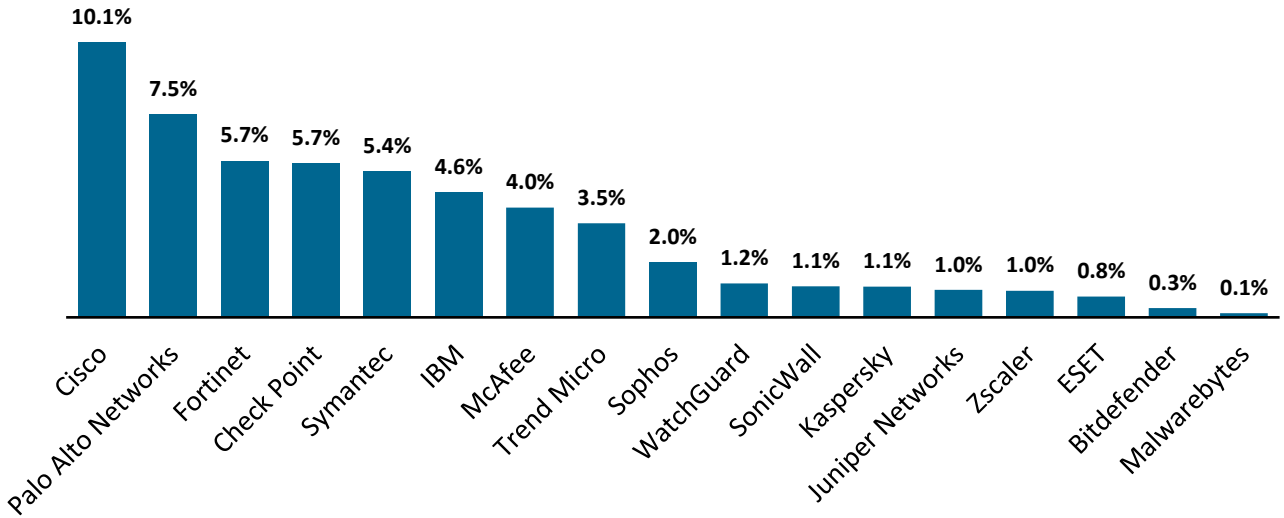| Vendor	Change
ESET	18.6%
WatchGuard	-2.6%
Bitdefender	54.7%
Zscaler	16.6%
Check Point	21.9%
Kaspersky	13.4%
SonicWall	11.7%
Trend Micro	13.9%
Sophos	-0.4%
Palo Alto Networks	7.7%
Malwarebytes	9.5%
Juniper Networks	8.8%
Fortinet	1.6%
Cisco	-0.6%
IBM	-2.5%
McAfee	2.9%
Symantec	-9.7%

Source: Candefero Vendor Benchmark, May 2020

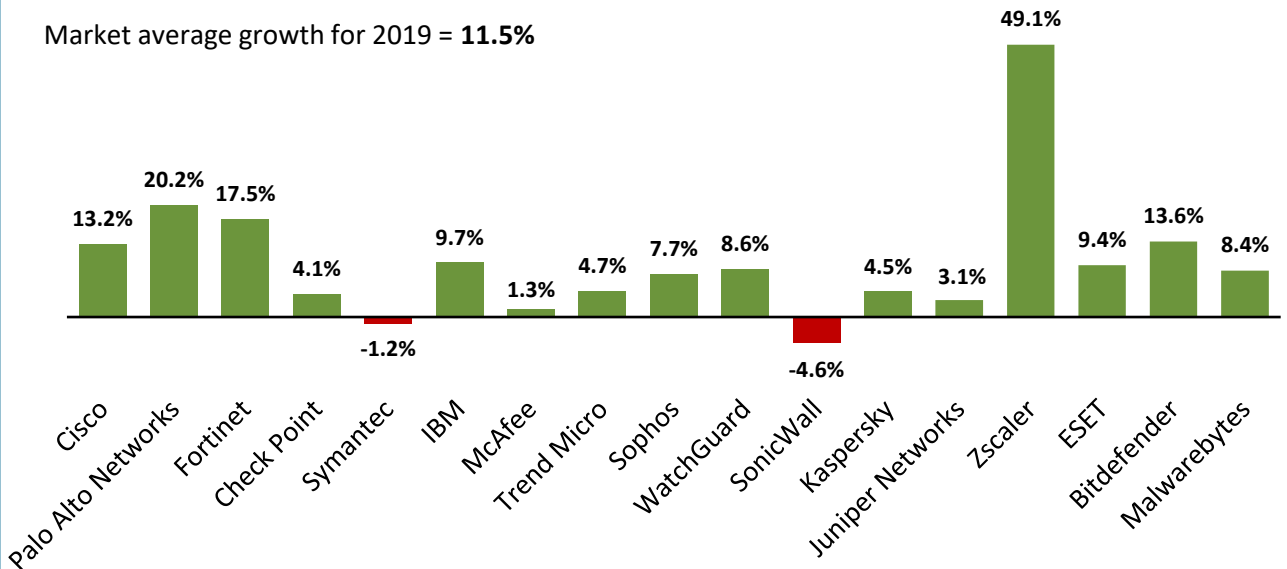# Canalys Global Cybersecurity Leadership Matrix 2020

Canalys cybersecurity vendor shipment indicators

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

Vendor	Market Share
Cisco	10.1%
Palo Alto Networks	7.5%
Fortinet	5.7%
Check Point	5.7%
Symantec	5.4%
IBM	4.6%
McAfee	4.0%
Trend Micro	3.5%
Sophos	2.0%
WatchGuard	1.2%
SonicWall	1.1%
Kaspersky	1.1%
Juniper Networks	1.0%
Zscaler	1.0%
ESET	0.8%
Bitdefender	0.3%
Malwarebytes	0.1%

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%**

Vendor	Growth
Cisco	13.2%
Palo Alto Networks	20.2%
Fortinet	17.5%
Check Point	4.1%
Symantec	-1.2%
IBM	9.7%
McAfee	1.3%
Trend Micro	4.7%
Sophos	7.7%
WatchGuard	8.6%
SonicWall	-4.6%
Kaspersky	4.5%
Juniper Networks	3.1%
Zscaler	49.1%
ESET	9.4%
Bitdefender	13.6%
Malwarebytes	8.4%

Source: Canalys estimates, March 2020

Global performance highlights – selected vendors

Bitdefender

VB rating May 2020:	Global 2019 market share:	Global 2019 Shipment growth:
82.9%	**0.3%**	**13.6%**

✅ **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%)

12-month rating trend

- 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:	Global 2019 market share:	Global 2019 Shipment growth:
79.0%	**5.7%**	**4.1%**

✅ **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%)

12-month rating trend

- 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.

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Global performance highlights – selected vendors

CISCO

VB rating May 2020:	Global 2019 market share:	Global 2019 Shipment growth:
68.5%	**10.1%**	**13.2%**

✅ **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%)

12-month rating trend

- 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.

ESET

VB rating May 2020:	Global 2019 market share:	Global 2019 Shipment growth:
84.2%	**0.8%**	**9.4%**

✅ **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%)

12-month rating trend

- 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.

Global performance highlights – selected vendors

FORTINET

VB rating May 2020:	Global 2019 market share:	Global 2019 Shipment growth:
68.7%	5.8%	17.5%

✅ **Highest-rated benchmark metrics**
- Product availability and supply (75.3%)
- Quality of technical support 70.6%)

❌ **Lowest-rated benchmark metrics**
- Marketing activities and lead-generation (61.5%)
- Managing conflicts with other resellers and direct sales teams (66.8%)

12-month rating trend

- Fortinet announced a new channel partner program with accreditation levels including Advocate, Select, Advanced and Expert to help partners better align their business goals with its own. These tiers are assigned on partner revenue and certification. The program was later updated with a new deal registration policy, modular training curriculum and incentive programs aimed at enablement activities.

- Its strategy is to segment partners serving SMBs, enterprises and service providers with dedicated sales teams to encourage more partner-led revenue in new customers and expansion in existing customers. It also introduced partner specialization with focused training on SD-WAN, Security Fabric, data center operational technology and SOC. MSSPs are already gaining traction with Fortinet Secure SD-WAN.

JUNIPER NETWORKS

VB rating May 2020:	Global 2019 market share:	Global 2019 Shipment growth:
69.4%	1.1%	3.1%

✅ **Highest-rated benchmark metrics**
- Quality of technical support customers (73.0%)
- Managing conflicts with other resellers and direct sales teams (72.3%)

❌ **Lowest-rated benchmark metrics**
- Usefulness of portal and electronic tools (64.7%)
- Marketing activities and lead-generation (65.4%)

12-month rating trend

- Juniper Networks has increased investment and focus on its security portfolio, following the launch of the Juniper Connected Security strategy in 2019. This offers advanced threat protection to provide enterprises with extended protection across all points of the network.

- It launched an MSP Cloud program aimed at supporting Elite- and Select-level partners that focus on offering secure cloud capability through its centrally managed solution. It supports initiatives such as its MSSP post-paid program for virtual firewalls, Service Provider as a Channel (SPaaC) and its Managed Customer Premises Equipment (CPE) program. It also offers partner tools, such as Marketing Central, Lead Management and Partner Leadership Management, to improve the partner onboarding process.

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Global performance highlights – selected vendors

kaspersky

VB rating May 2020:	Global 2019 market share:	Global 2019 Shipment growth:
77.9%	**1.1%**	**4.5%**

✅ **Highest-rated benchmark metrics**
- Product availability and supply (85.7%)
- Effectiveness of account management (81.2%)

❌ **Lowest-rated benchmark metrics**
- Marketing and lead-generation (71.9%)
- Growth through services and support (74.8%)

12-month rating trend

80%
78%
76%
74%
72%
70%
68%

May 19   Aug 19   Nov 19   Feb 20   May 20

- Kaspersky launched its United Partner program in 2019, enabling partners to focus on selling Kaspersky products and technical support service specializations that provide additional revenue. It launched a new Partner Portal that provides access to reporting dashboards, documents, an on-demand multi-lingual training library, marketing content, automated deal registration and MDF processing. A multi-region lead-generation program was also implemented.

- Kaspersky launched the License Management Portal integrated with its Partner Portal as a one-stop service for MSP partners to purchase licenses, and manage customers with a flexible pay-as-you-go billing model and online sales and technical MSP-dedicated training. It also announced integrations with key RMM and PSA platforms.

paloalto® NETWORKS

VB rating May 2020:	Global 2019 market share:	Global 2019 Shipment growth:
71.3%	**7.5%**	**20.2%**

✅ **Highest-rated benchmark metrics**
- Product availability and supply (75.3%)
- Accreditation and specialization programs (73.0%)

❌ **Lowest-rated benchmark metrics**
- Marketing activities and lead-generation (65.4%)
- Growth through services and support (70.0%)

12-month rating trend

72%
71%
70%
69%
68%
67%
66%
65%

May 19   Aug 19   Nov 19   Feb 20   May 20

- Palo Alto Networks has 7,000 partners worldwide. It enhanced the NextWave Partner Program adding new initiatives, such as the NextWave Managed services program with customized incentives for MSPs. It launched a new MSSP initiative in conjunction with the NextWave Partner Managed Services program to help partners build services with specializations, which integrates CSSP offerings.

- It launched a network for MDR partners to provide total security lifecycle services from deployment, set-up and response supported by Cortex XDR. Its strategy is to help partner evolve their own managed services and add new cloud services to their portfolios. Its recent acquisition of CloudGenix will add cloud-delivered SD-WAN as part of its secure access service edge platform.

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Global performance highlights – selected vendors

SOPHOS

VB rating May 2020:	Global 2019 market share:	Global 2019 Shipment growth:
71.4%	2.0%	7.7%

✅ **Highest-rated benchmark metrics**
- Product availability and supply (78.3%)
- Ease of doing business (72.3%)

❌ **Lowest-rated benchmark metrics**
- Marketing and lead-generation (66.4%)
- Effectiveness of their account management (69.0%)

12-month rating trend

73%
72%
71%
70%
May 19   Aug 19   Nov 19   Feb 20   May 20

- Sophos' acquisition by private equity firm Thoma Bravo was completed in March 2020. Channel sentiment dipped between the announcement of the deal and its completion, but has since improved. Sophos aims to continue expanding its portfolio and train partners with cloud-native, AI-powered tools to drive growth, as well as extend its existing solutions to cloud-based offerings.

- It undertook efforts to simplify partner management by offering pre-sales and post-sales services, MSP Fast Track to Flex workshops and partner onboarding programs, and updated its partner portal with new sales tools and resources. Channel service center enabling marketing campaigns and co-branding has helped to grow more partner-led sales.

Symantec™

VB rating May 2020:	Global 2019 market share:	Global 2019 Shipment growth:
59.5%	5.4%	-1.2%

✅ **Highest-rated benchmark metrics**
- Product availability and supply (68.0%)
- Quality of technical support (65.2%)

❌ **Lowest-rated benchmark metrics**
- Marketing and lead-generation (50.1%)
- Effectiveness of their account management (55.0%)

12-month rating trend

68%
66%
64%
62%
60%
58%
May 19   Aug 19   Nov 19   Feb 20   May 20

- Broadcom completed the acquisition of Symantec's Enterprise business in November 2019. Its stated strategy is to manage customers with the largest footprints via a direct GTM, and enterprise and commercial accounts via a partner-led GTM. The closure of its online licence renewal portal and the end-of sale of SEP Cloud and SEP SBE products as part of SES transition affected channel sentiment.

- It will focus on key partners to grow their expertise by offering better pricing, discounts, training and support to customers. It aims to retain all resellers but re-route most of them via a two-tier model, while also reducing the number of distributors it works with. It has started to engage more regularly with partners through portals and webcasts. It is also in the second phase of transitioning its Secure One partner program and plans to combine it with the CA Technologies program by the end of 2020.

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Global performance highlights – selected vendors

TREND MICRO™

VB rating May 2020:	Global 2019 market share:	Global 2019 Shipment growth:
73.8%	**3.5%**	**4.7%**

✅ **Highest-rated benchmark metrics**
- Product availability and supply (79.3%)
- Ease of doing business (75.4%)

❌ **Lowest-rated benchmark metrics**
- Marketing activities and lead-generation (65.9%)
- Margin retention and profitability (68.0%)

12-month rating trend

- Trend Micro continues to make significant investments in its channel via its partner portal, including deal registration, sales kits, promotions and training. It enhanced its MSP programs with a central licensing management platform and a SOCaaS offering to automate cross-customer and cross-product threat analysis. It co-manages services to provide proactive monitoring against ransomware, targeted attacks and repeated infections. It has also continued to align with AWS's CPPO program.

- In 2020, many regions refreshed their partner program with adjusted discounts to drive its enterprise business, as well as its partner portal, marketing center for lead-generation and its mobile app. It introduced instant demo for cloud products to help partners generate leads by offering live demos on the latest products and 30-day product trials. Almost 46% of free trials led to sales in 2019.

WatchGuard

VB rating May 2020:	Global 2019 market share:	Global 2019 Shipment growth:
83.7%	**1.2%**	**8.6%**

✅ **Highest-rated benchmark metrics**
- Product availability and supply (88.2%)
- Ease of doing business (86.1%)

❌ **Lowest-rated benchmark metrics**
- Marketing activities and lead-generation (75.6%)
- Managing conflicts with other resellers and direct sales teams (81.5%)

12-month rating trend

- WatchGuard launched its WatchGuard Cloud Platform in 2019 to centralize partners' management and reporting through a single dashboard. WatchGuard has more than 9,000 partners worldwide. It updated the WatchGuardONE program to allow specializations in multiple technologies like network security, secure Wi-Fi and MFA. The acquisition of Panda Security will add endpoint capabilities and expands its reach in Europe and Latin America via 6,500 partners.

- It expanded the FlexPlay program by introducing subscription options for network security and hardware services. MSPs are offered monthly billing options with no commitments and upfront costs. In 2020, it will continue evolving its partner programs to drive MSP growth.
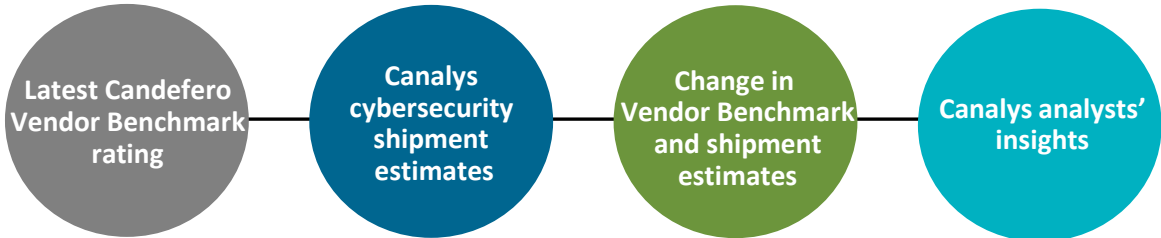
Canalys Cybersecurity Leadership Matrix 2020

About the Canalys Cybersecurity Leadership Matrix

Latest Candefero Vendor Benchmark rating — **Canalys cybersecurity shipment estimates** — **Change in Vendor Benchmark and shipment estimates** — **Canalys analysts' insights**

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.