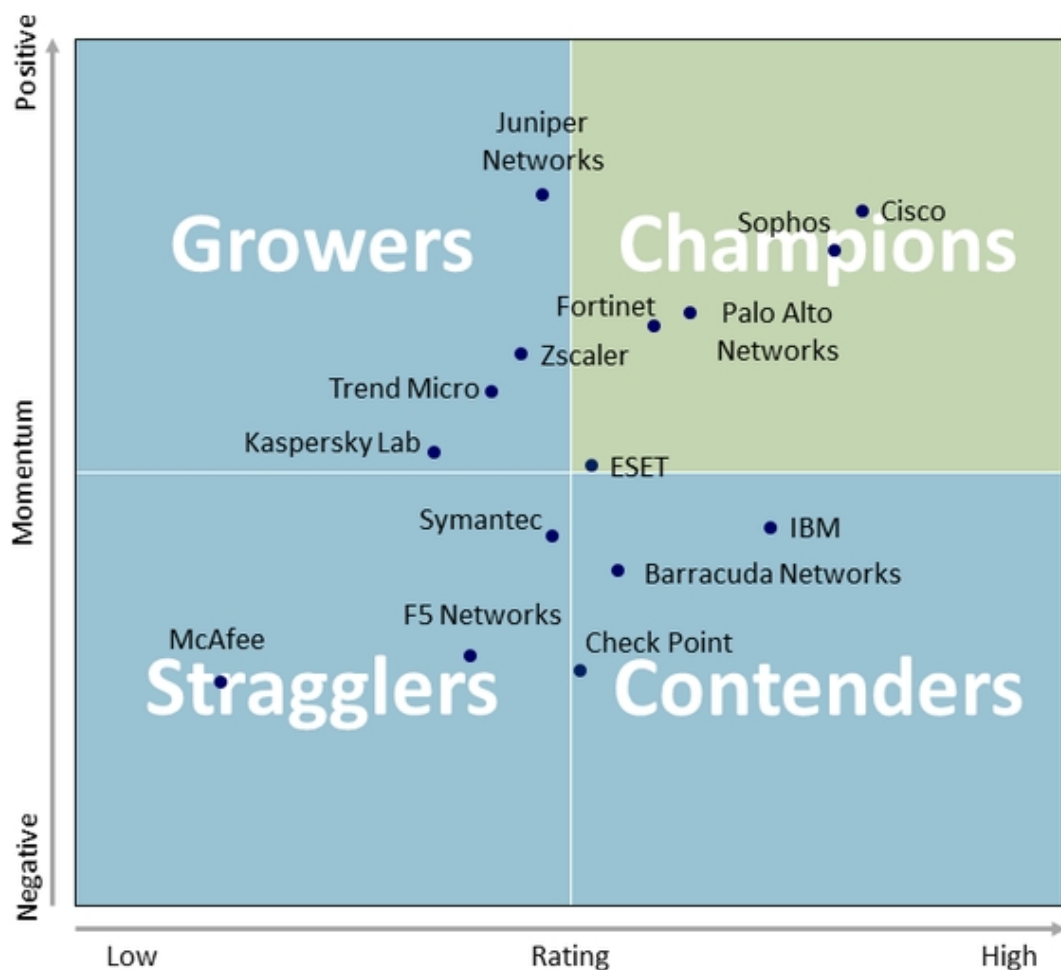


The 5 Champions in the Canalys Security Matrix

Written by Alice Marshall
27 June 2019

Canalys combines channel partner feedback and quarterly shipment estimates to declare Cisco, Sophos, Palo Alto Networks, Fortinet and ESET as Champions in the 2019 Cybersecurity Leadership Matrix.

Global Cybersecurity Leadership Matrix – May 2019



The Leadership Matrix assesses the channel performance of 15 security vendors over the past 12 months. The Champions have the highest scores in the Canalys vendor benchmark, and show characteristics such as positive partner sentiment, ongoing improvements in channel processes, a willingness to boost growth opportunities for partners and a commitment to

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growing revenue share generated through the channel.

Thus, Cisco is a Champion not only because of leading market share, but also due to ongoing investment in partner profitability, since it offers higher front-end margins to encourage cross-product integration sales. ESET continues to expand internationally, leading to investments in local resources to work closely with key partners. Palo Alto Networks is one of the fastest-growing vendors thanks to acquisitions to strengthen its portfolio in high-growth areas such as cloud security.

Fortinet is expanding beyond selling just firewalls with the Security Fabric architecture, enabling partners to accelerate growth. The final champion, Sophos, sees high partner sentiment combined with consistent growth and a shift to delivering synchronised network and endpoint security.

Canalys points out Juniper Networks, Zscaler, Trend Micro and Kaspersky Lab as Growers, meaning they support the channel community and make improvements in performance and channel feedback. Juniper increased focus on security in the past 12 months, giving it the highest momentum in the security channel. Trend Micro sees success with the Deep Security line and the revived TippingPoint business, while Kaspersky Lab improved partner communications to offset public scrutiny leveled by the US government during 2018.

McAfee, Symantec and F5 Networks earn the dubious honour of Stragglers. McAfee and Symantec lead in endpoint security and have large installed bases, but both need to vigorously defend their positions in the channel against vendors moving into the endpoint sphere, as well as a wave of emerging security vendors. Symantec was negatively affected by the divestiture of the WSS/PKI business, while McAfee faces friction from many channel partners.

The analyst classifies the remaining vendors as Contenders. They are all highly rated by partners, but face challenges in either market performance or declining channel sentiment. For instance, IBM, Barracuda and Check Point need to focus on building their channel business. IBM risks losing relevance as it divests of software assets such as BigFix, while Check Point needs to become quicker at supporting partners, especially since main competitors Cisco, Palo Alto Networks and Fortinet are all listed as Champions.

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