



## NETWORK SECURITY

# Check Point wins channel mindshare

**W**hen it comes to network security, the solutions have predominantly become hardware appliance driven and this has helped widen the channel participation in this category. Cisco, which won the title in this category in 2008, was shockingly relegated to the fourth position in 2009, while Check Point, which failed to make the final cut last year, emerged as the most-preferred network security company. Fortinet came second followed by Cyberoam. Juniper and SonicWall failed to make it to the last round because they received less than 10 percent votes.

### Check Point

Till 2008, Check Point completely lacked focus on tier-2 channels, and used to engage only with select tier-1 partners. However, over the last 12-18 months, following the appointment of Bhaskar Bakthavatsalu as head of India operations, the company has been aggressive in partner development initiatives and has put in place a strong partner engagement program.

The company improved its product availability and channel penetration by adding two new distributors, M-Virtual Technology and Texonic. While it is price positioned at a 20-25 percent premium over Fortinet, many Fortinet partners said that they lost some large enterprise deals to Check Point because the company was very aggressive with its SPC.

In terms of performance and technology Check Point is regarded as the best, with a proven and stable technology. The strengths of Check Point UTM products include its firewall technology and end-point security.

The company has put in place a strong pre-sales and sales support team in every region. However, Check Point needs to improve its post-sales support because the support currently provided through its distributors is not adequate. Also, while the company enjoys good brand-pull among large enterprises, it lacks brand awareness and customer pull in the SMB segment.

### Fortinet

Respondents agree that in the UTM space Fortinet enjoys a brand-pull that no other vendor does. Consequently, the company scored better than its peers on the brand-pull and customer marketing criteria. The company also scored higher than its peers in price-performance. Fortinet is priced about 20 percent less than Cisco and Check Point, and in terms of performance it's rated at par with Check Point. The company has opened its India support center in Bengaluru, and introduced RMA support with a 24x7 advance replacement service. Respondents rated its post-sales support below Cyberoam but ahead of Check Point.

While respondents said that the quality of pre-sales skills at Fortinet is good, the team has a laid-back attitude. Also, a few

## Score Card

Criterion	Check Point	Fortinet	Cyberoam	Cisco
Product availability	1	2	3	4
Price-performance	2	1	3	4
Partner profitability	1	2	3	4
Brand-pull and marketing	2	1	3	4
Channel marketing and pre-sales support	1	2	3	4
Channel training and certification	2	3	1	4
Post-sales support	3	2	1	4
Channel policies and management	1	3	2	4
<b>FINAL RANK</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>



of its partners complained that Fortinet sided with tier-1 partners for large SMB deals, and that in seven out of 10 cases the deals were passed in favor of tier-1 partners. The company deal registration and SPC process is too person-dependent and hence sometimes lacks transparency.

#### Cyberoam

Cyberoam's strength lies in the less-than-250-user UTM appliance segment.

Many partners in class B and C cities reported product availability issues. They said that the distributors did not have ex-stock availability of entry-level UTM products, and that they took 5-7 days to deliver.

Respondents said that Cyberoam has made notable improvements in its product offerings over the last two years. The 30-user box which the company launched last year, and which was priced at less than Rs 30,000, has found many takers in smaller cities.

Cyberoam was ranked number one on channel training and certification because in 2009 the company conducted free training and certification programs for even non-partners in several cities.

The company's after-sales support is rated the best among peers, with prompt response and even same-day replacement in many cases. Respondents said that

Cyberoam should focus more on improving partner profitability, customer marketing, lead generation and pre-sales support.

#### Cisco

Cisco, which won the category in 2008, got the lowest ratings across all channel preference parameters. Respondents complained about pricing, product availability and the company's channel policy and management. They opined that after integrating Ironport's operations with Cisco's, the company has lost focus on Ironport products, and is largely pushing its ASA range of UTMs.

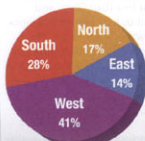
In 2009, the company changed the licensing policy—from unlimited users to limited users—and this led to significant price hikes over 2008. It also raised the cost of renewal for customers. Many respondents said that as a result of the new licensing policy, existing customers were asked to pay renewals which were double the cost of the price of the security appliance itself.

The company faced availability issues, and there were delays in receiving its ASA range of products. Cisco products demand at least 20-30 percent premium over Fortinet, and in some cases 10-15 percent above Check Point. Consequently, the company is losing to the competition in terms of price-performance. ■

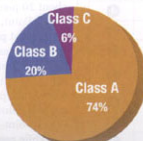
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### SURVEY DEMOGRAPHICS: NETWORK SECURITY

VOTE BREAK-UP BY REGION



VOTE BREAK-UP BY TYPE OF CITY



VOTE BREAK-UP BY RESELLER TYPE

