

August 2026

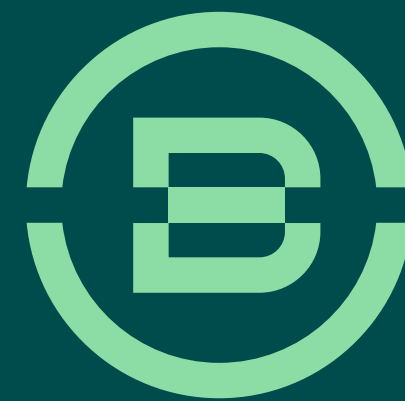
The state of innovation in cybersecurity

A study among CISOs, security teams, and security vendors on innovation, procurement, and collaboration





Security
Innovation
Stories



Beyond
Products

Introduction

How much innovation is actually happening in security, and how is the way it's purchased changing? That is the core question of this research.

For more than 7 years I was on the vendor side of cybersecurity myself. So I know how hard it is to truly understand what a CISO or IT professional is really looking for.

You build a proposition, train your sales team, and meanwhile hope it matches what's happening on the other side of the table. Often you base that on gut feeling and on signals that are already months old by the time you pick up on them.

For Security Innovation Stories I speak with CISOs, IT leaders, and security innovators every week. Those conversations form the basis of this research, supplemented with quantitative research among buyers and vendors. That way, every story is enriched with data.

You can read the results in this report: what's being newly built, what of that is actually being adopted, and why the two so often diverge. For vendors this is a mirror; for buyers, an impression of what the market has to offer.

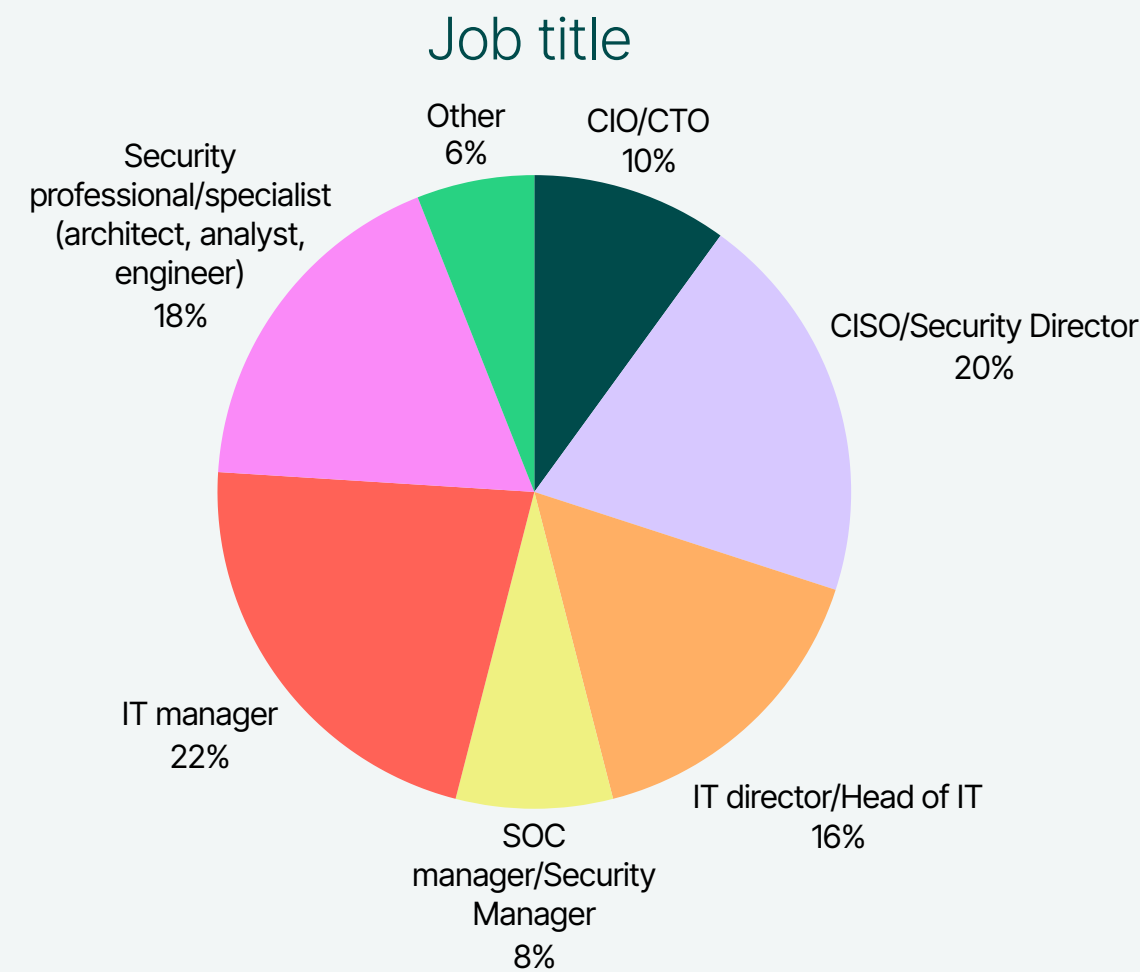
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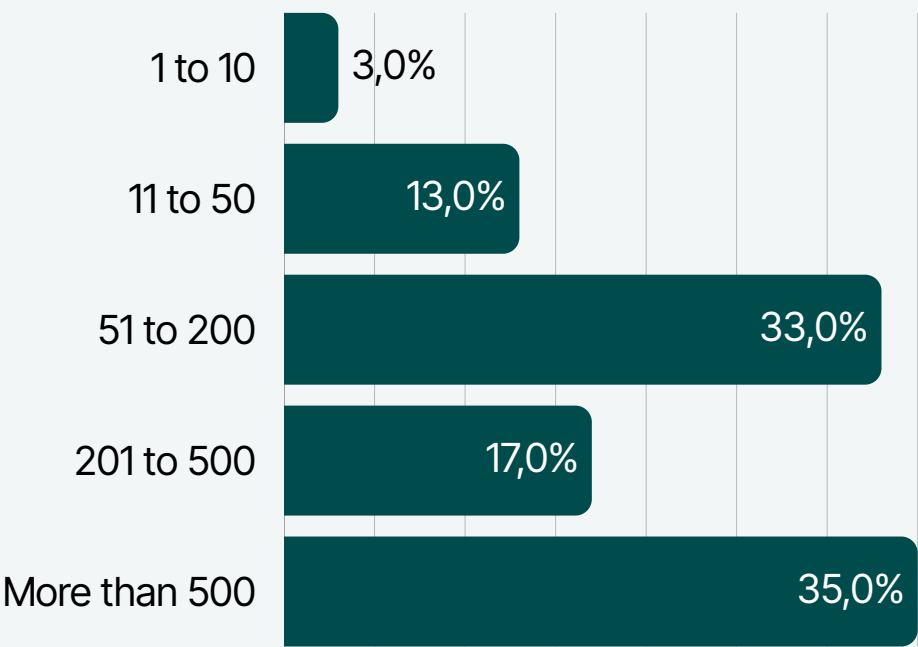
Who did we talk to?

We mainly spoke with the people who decide on or advise on security purchasing: two-thirds are CISO, IT director, IT manager, or CIO.

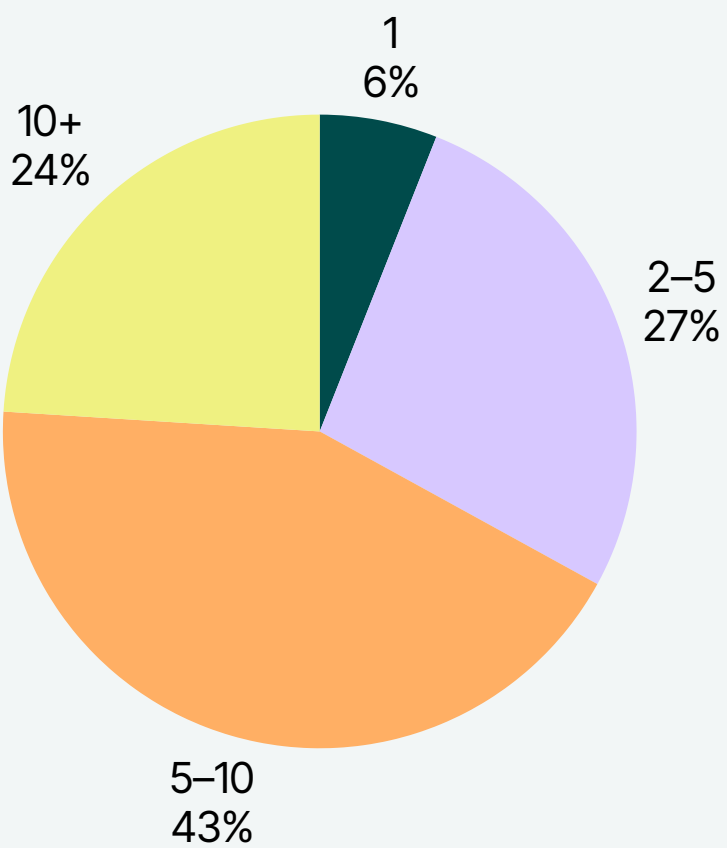
156 buyers took part in the survey



Number of employees at organization



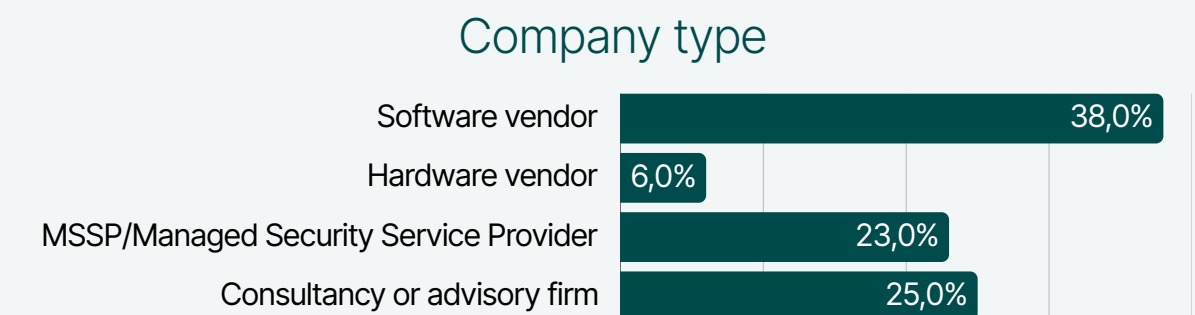
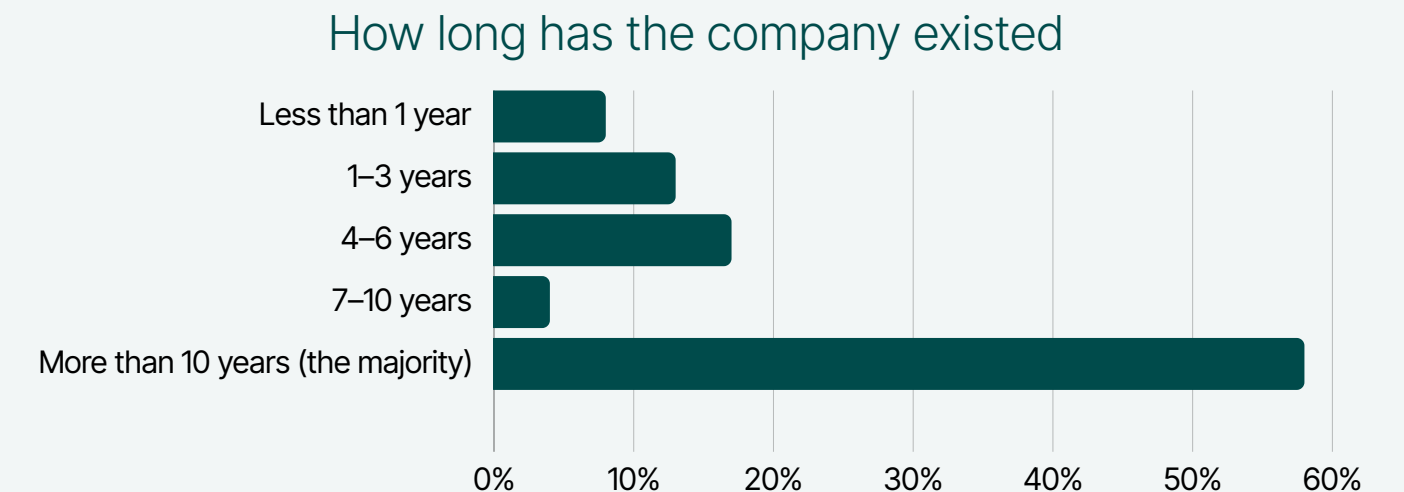
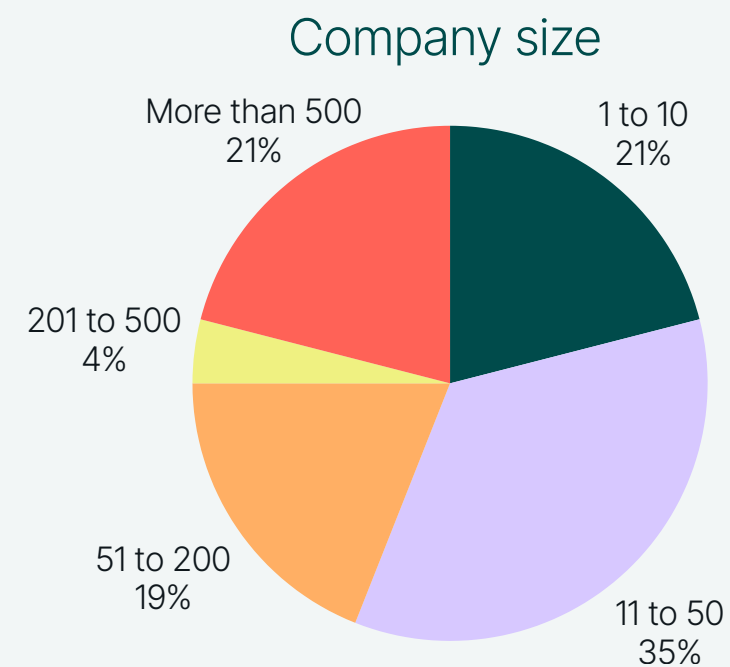
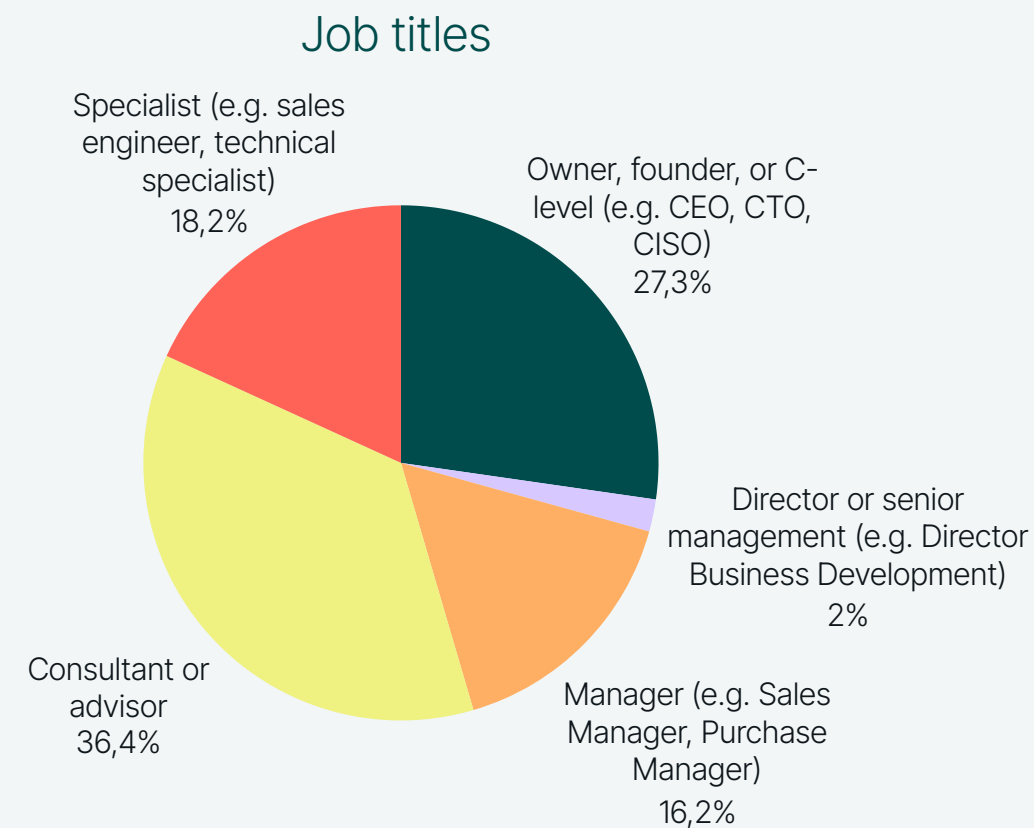
Security team size



Who did we talk to?

We mainly spoke with senior roles at software vendors: nearly two-thirds of respondents are owner, founder, C-level, or consultant, and 4 in 10 work at a software vendor.

48 vendors took part in the survey



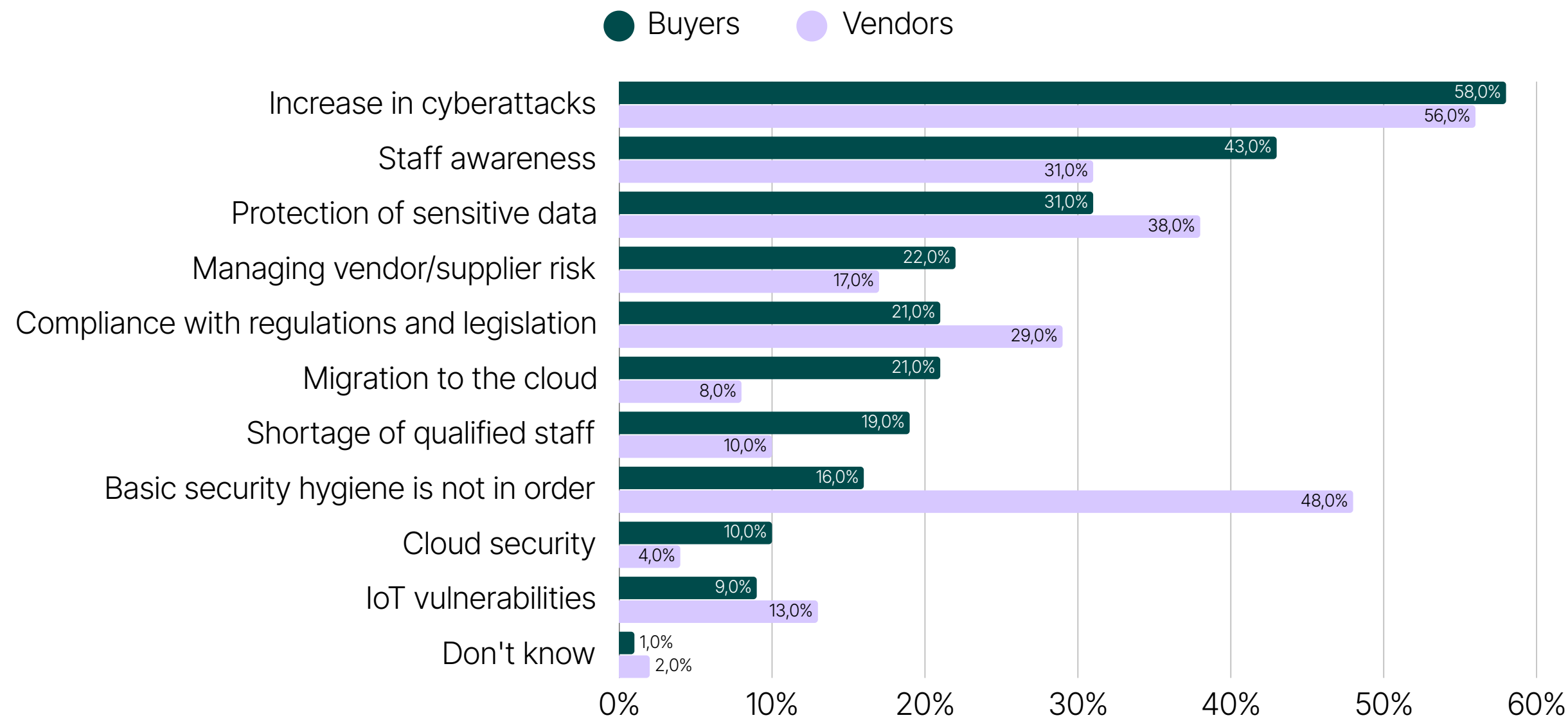
Developments in the market

58%



of buyers see the increase in cyberattacks as their biggest challenge.

Biggest challenge in security over the next 3 years

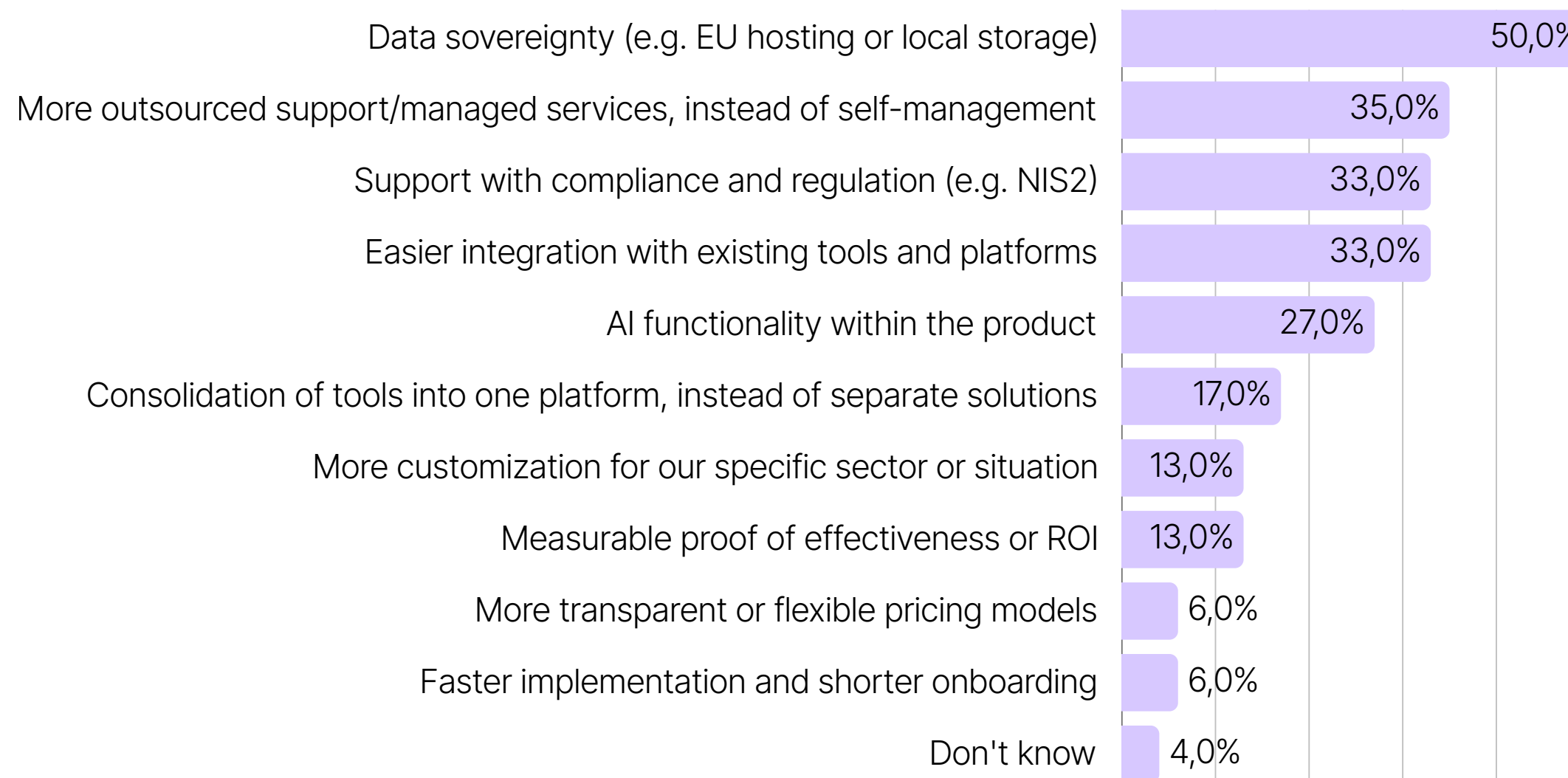


Source: buyers N=156, vendors N=48.



- Buyers and vendors unanimously see cyberattacks as the biggest threat.
- Staff awareness diverges between buyers and vendors: buyers see this as a challenge far more often than vendors do. Vendors may be more inclined to look for technical solutions to a problem that buyers themselves experience as a people problem.
- The gap is biggest on basic security hygiene: vendors cite this as a challenge far more often than buyers do themselves, even though a weak foundation is often exactly what opens the door to the cyberattacks both parties see as the biggest threat. Buyers may be underestimating this risk, or assume their own basics are already in order.

What do vendors say customers are asking for?



Source: vendors N=48.



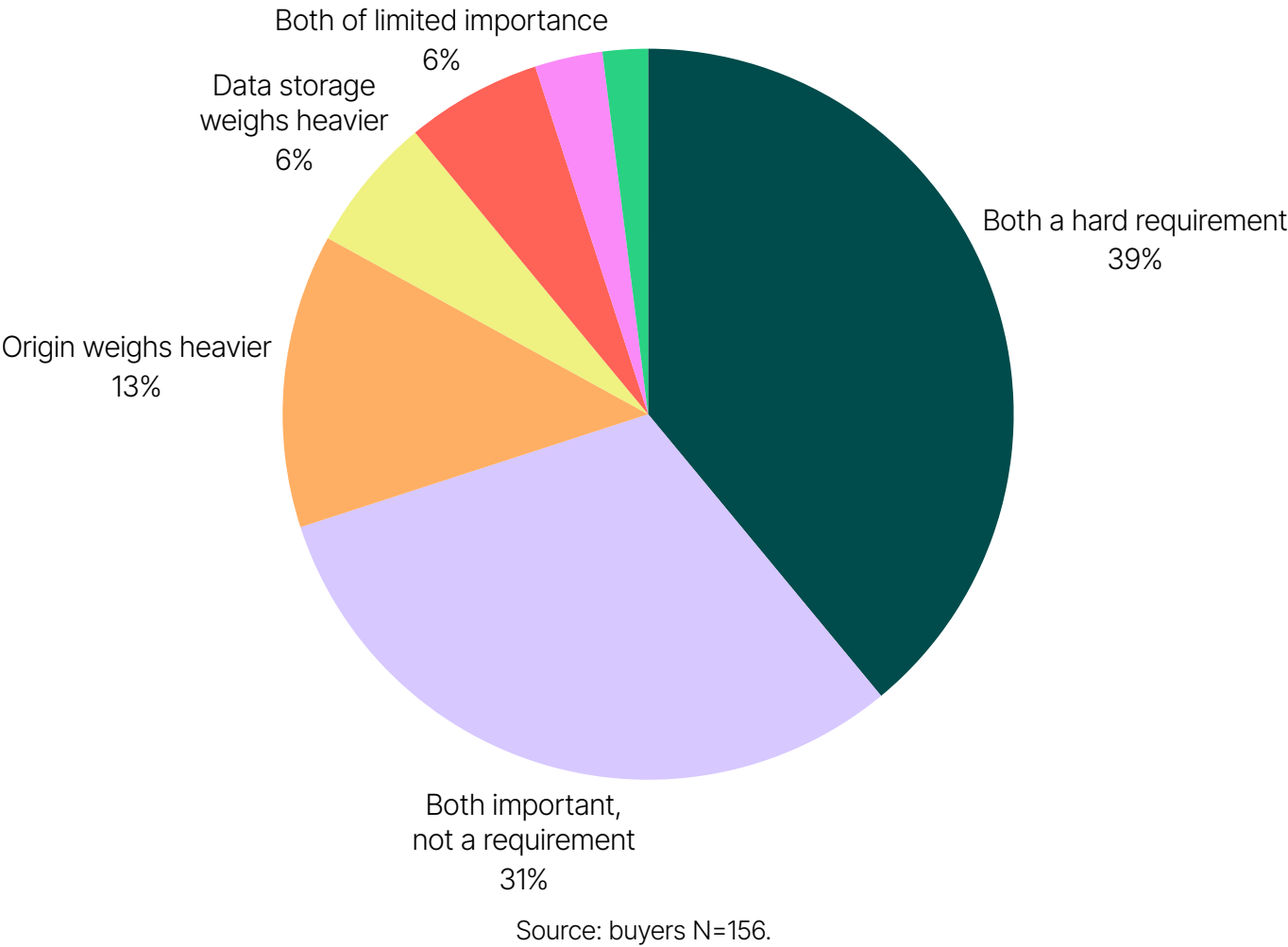
"Be more transparent from the start, with clear practical examples and pricing structures, and simplify the contract process so projects can get started faster."

Anonymous tip from a buyer, open field in the buyer survey

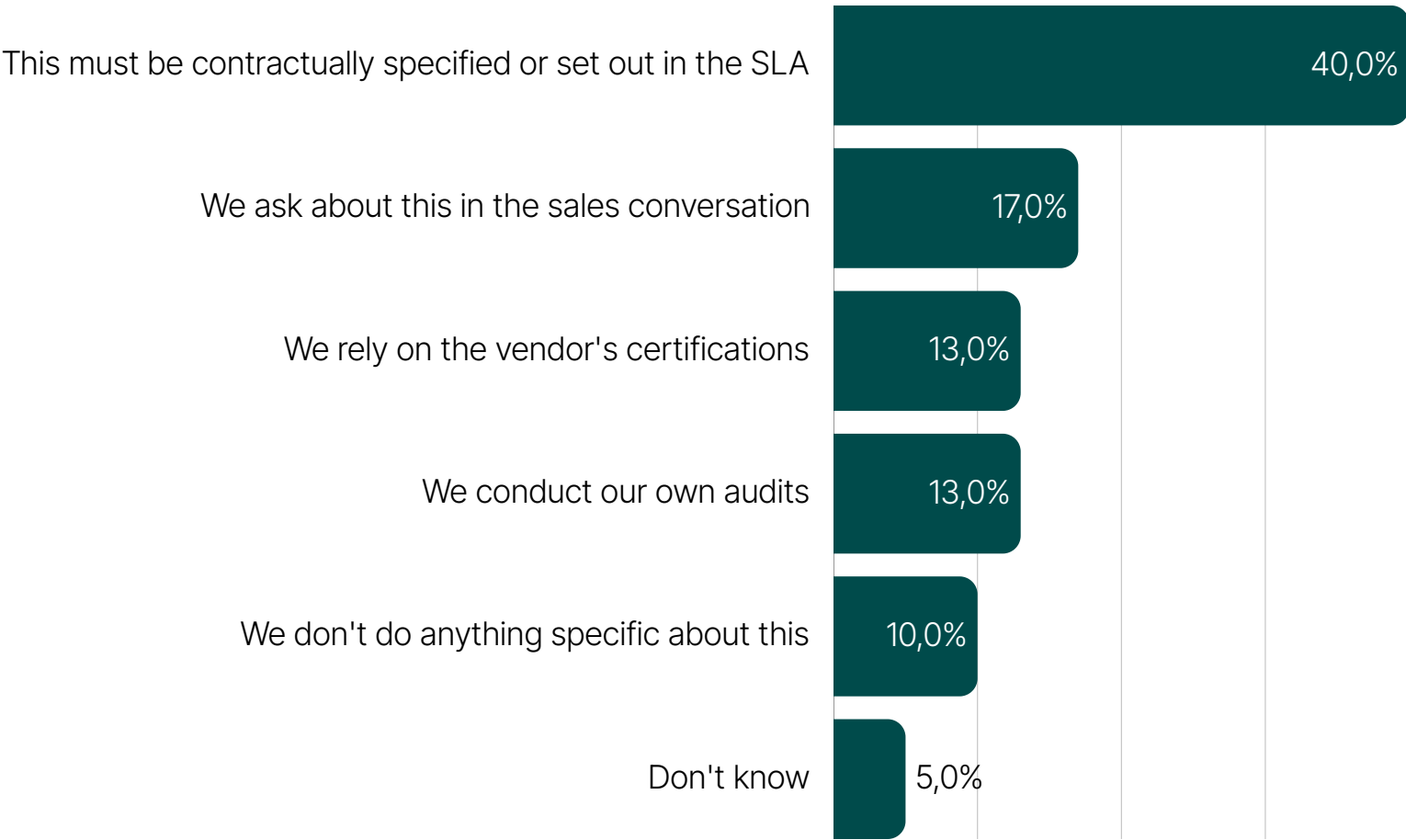
- Data sovereignty tops the list, a theme Dutch cybersecurity specialists have been flagging for a while. Whether that also translates into concrete behavior is shown in the figures that follow.
- Outsourced support and compliance assistance follow close behind: customers aren't just looking for technology, but also help with management.
- Price and speed rank at the bottom, even though one buyer in the survey specifically asked for more transparent pricing and a faster contract process.

Spotlight: sovereignty

Vendor origin and data storage location



What is done to ensure this



Source: buyers N=156.

Do buyers press vendors on origin and data storage?

56%

of vendors are regularly to almost always explicitly asked where they're based and where data is stored.

Source: vendors N=48.

10%

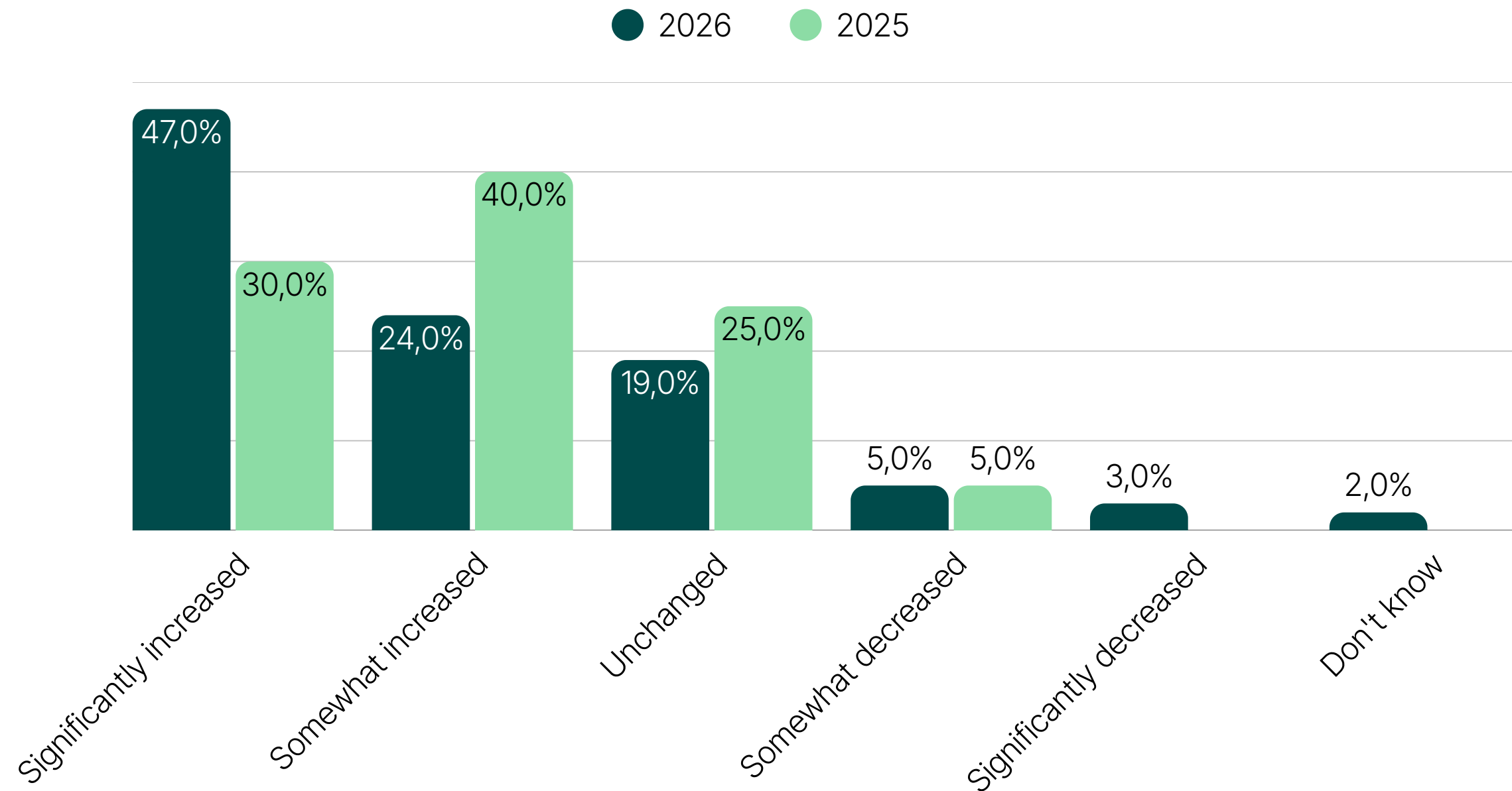
for only 10%, this is a fixed part of every purchasing process. So the question is widespread, but not yet standard practice.

Source: vendors N=48.



- Is data sovereignty a topic buyers only talk about, or one they also act on? The figures show: buyers ask about it and make it a requirement, but rarely check themselves whether vendors actually comply.
- For a large group, European or Dutch origin is even a hard requirement: without that origin, a vendor is disqualified.
- Yet the follow-through often stops at the contract: agreements are written into the SLA, but monitoring compliance is usually missing.
- Own audits or assessments are the exception rather than the norm: trust is placed in promises, not proof.

How is the security budget moving?



Source: buyers N=156, The State of Innovation 2025, N=20.

- The share of buyers with an increased budget stays roughly the same as last year, but the growth is more concentrated: far more buyers report a significant increase, rather than the smaller increase that was the norm last year.
- The share seeing a decrease is slightly larger this year than last year, though this remains a small minority of all buyers.

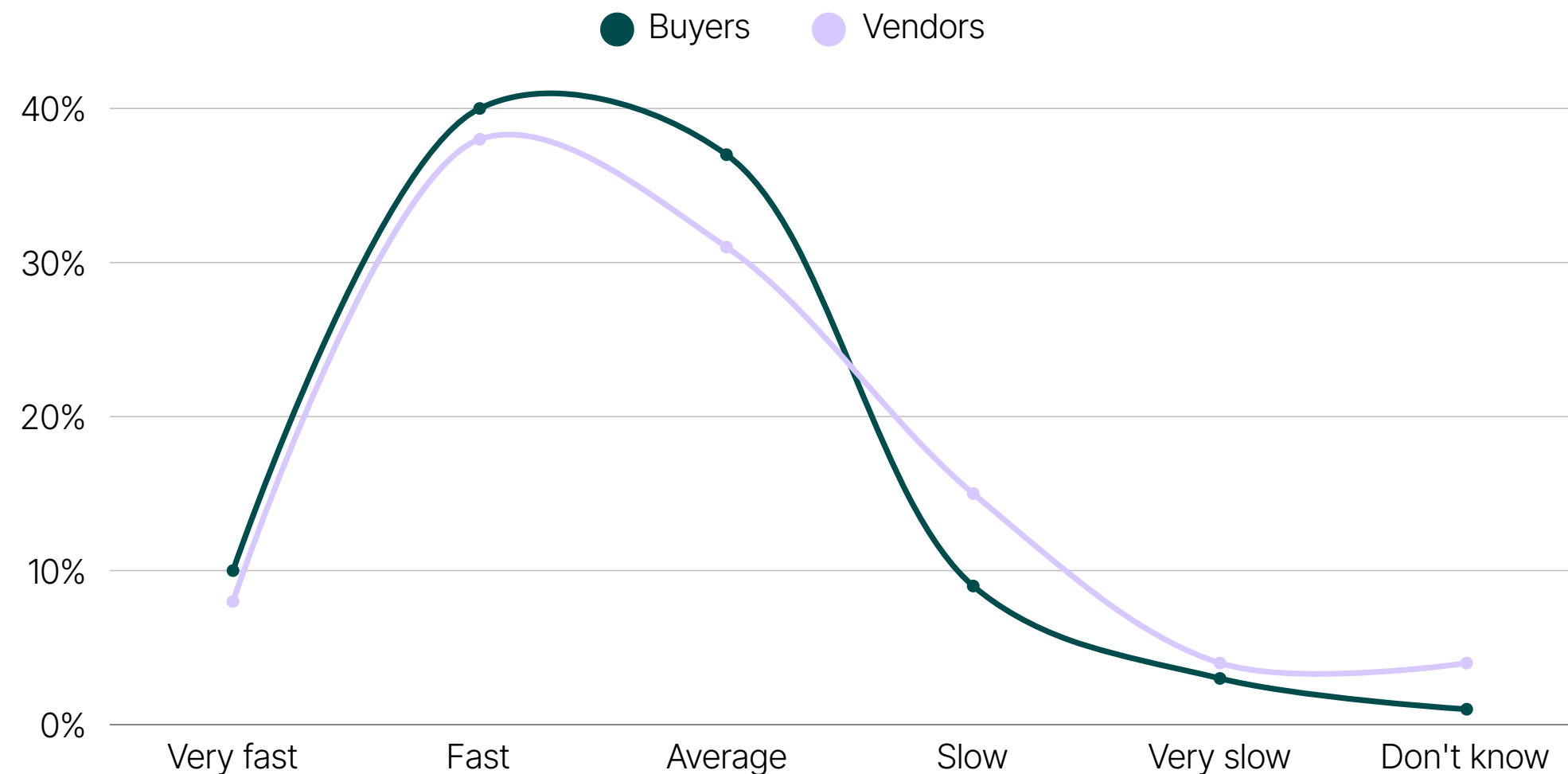
Innovation

85%



of buyers and vendors think security innovates at an average or fast pace.

Does the cybersecurity market innovate fast or slow?



Source: buyers N=156, vendors N=48.



“There's no magic solution, it all comes down to successfully embedding the tool or service in the organization together.”

Anonymous tip from a vendor, open field in the vendor survey

- 50% of buyers feel that innovation is happening fast or very fast, versus only 12% who call it slow: the majority experience a sector that's moving forward, not standing still.
- Vendors are more critical of themselves than buyers are of them: 19% of vendors call the pace slow or very slow, compared to 12% of buyers who see it that way.

How innovative are the products, according to buyers and vendors?

7,6

is the average score buyers give to the innovativeness of their current vendors.

Source: buyers N=156.

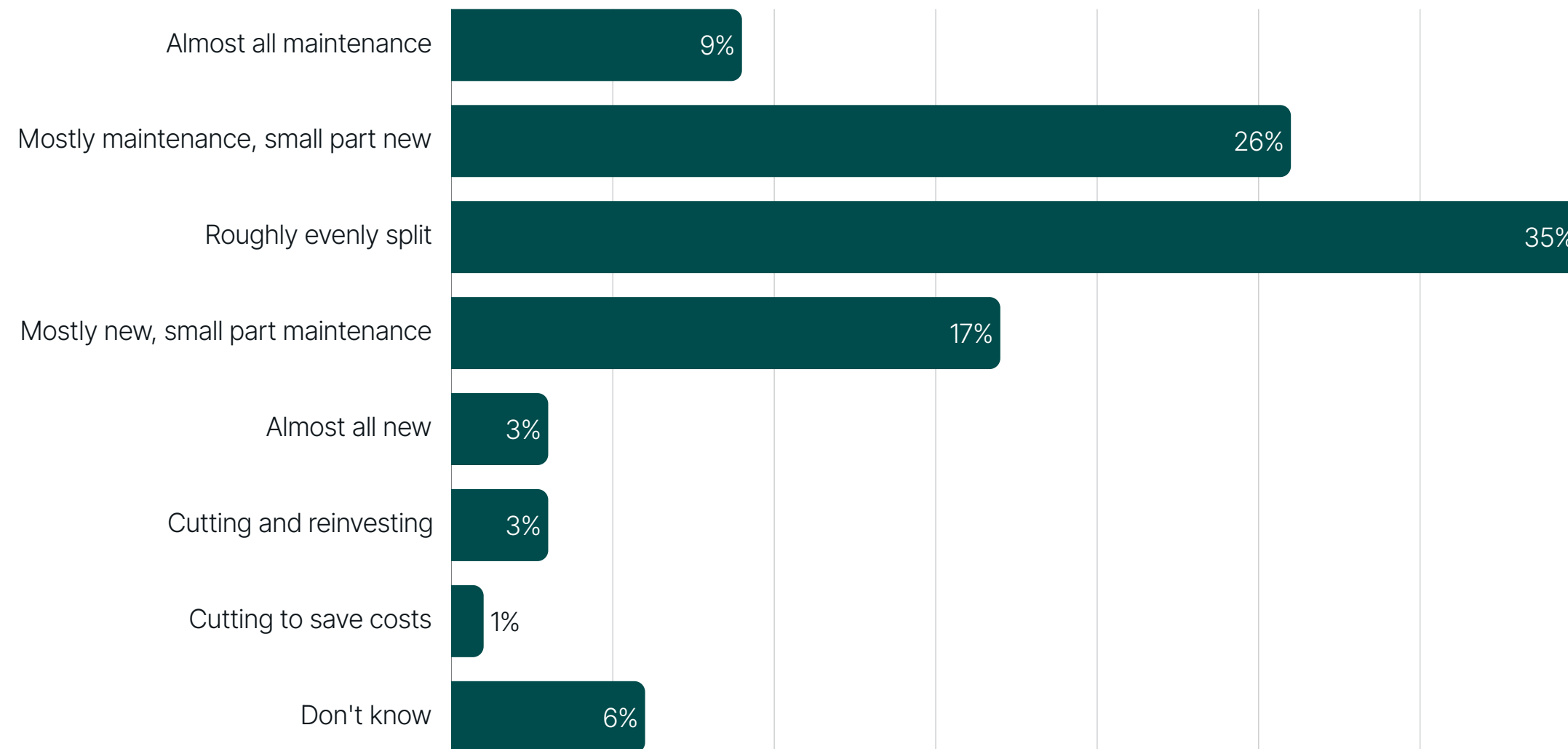
7,2

is the average score vendors give themselves on that same point.

Source: vendors N=48.



How is the security budget split: new versus maintenance?



Source: buyers N=156.



- The rising budget (page 11) doesn't automatically translate into more room for innovation: most buyers still largely split their money between maintenance and new solutions, with a clear lean toward maintenance whenever things are out of balance.
- Actively cutting to make room for something new is rare: extra budget tends to be added alongside the existing stack rather than leading to deliberate choices between old and new.

A well-known name, or a start-up with a more innovative solution?

55% of buyers prefer a well-known, established vendor, even when a less familiar player offers a more innovative solution.

26% are neutral on this and therefore don't clearly favor either certainty or innovation.

16% disagree with that safe choice, and would in fact choose the less well-known, more innovative vendor.

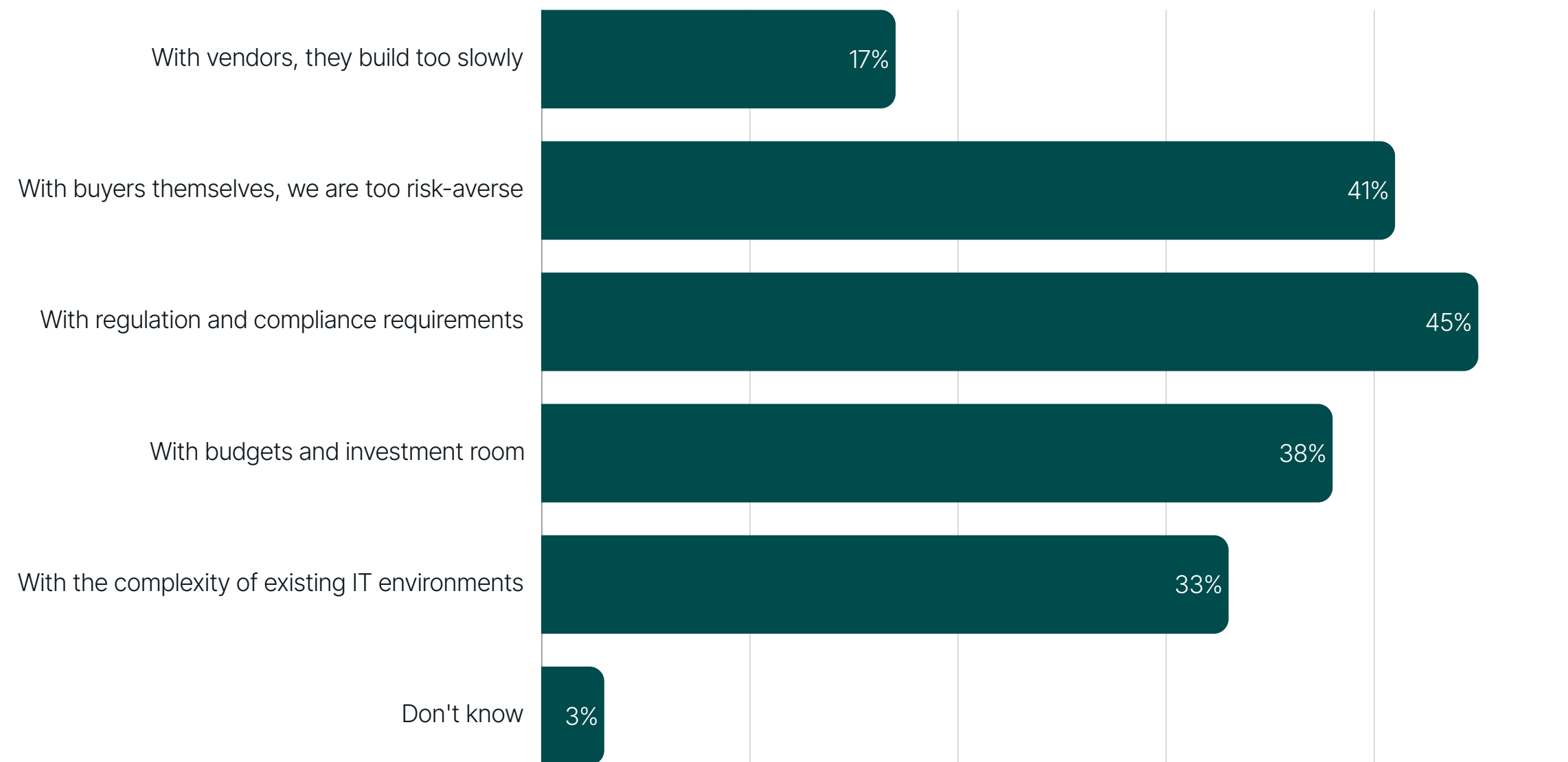
Source: buyers N=156.

The reason to choose an established vendor



Source: buyers N=156.

Reason for the biggest delay in adopting innovations



Source: buyers N=156.

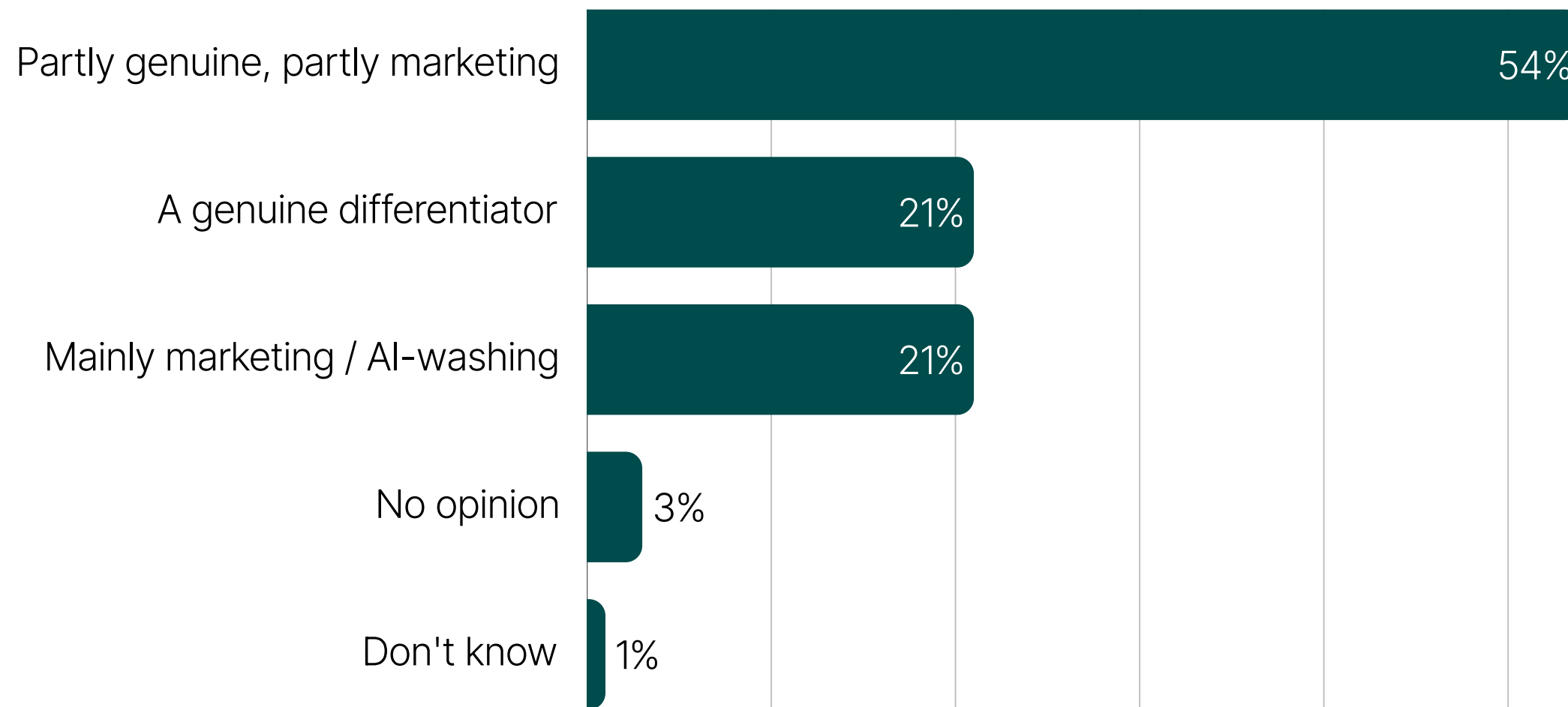


"Give startups a chance."

Tip from a vendor to buyers, open field in the vendor survey

- Delays in adoption mostly lie with the customer themselves, not the vendor: buyers least often point to vendors building too slowly.
- That delay doesn't have a single cause: regulation, buyers' own risk aversion, limited budget, and the complexity of existing IT environments all play a role, to roughly the same degree.

Is AI still innovation, or mainly marketing?



Source: buyers N=156.

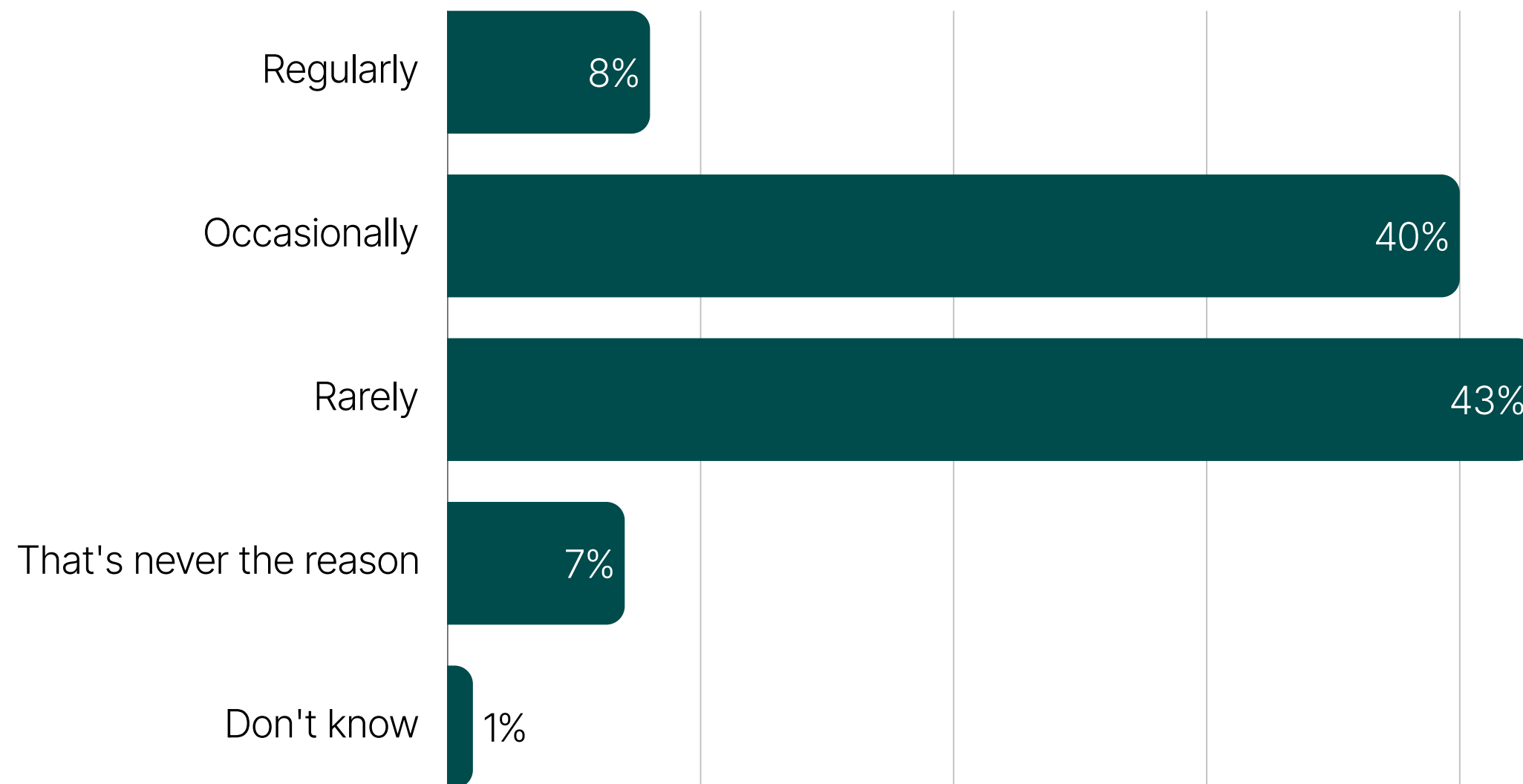


“Really dial back the hard push on AI”

Anonymous tip from a buyer, open field in the buyer survey

- Only 1 in 5 buyers call AI a genuine differentiator, and an equally large group call it mainly marketing.
- So the term "AI" itself no longer carries any distinguishing power. One buyer confirms this in an open answer: it's mainly "real cases," not marketing cases, that convince.
- So anyone using AI as a proposition needs to go beyond the word alone: concrete application and measurable results are what separate genuine differentiation from AI-washing.

Is innovation a reason to switch vendors?



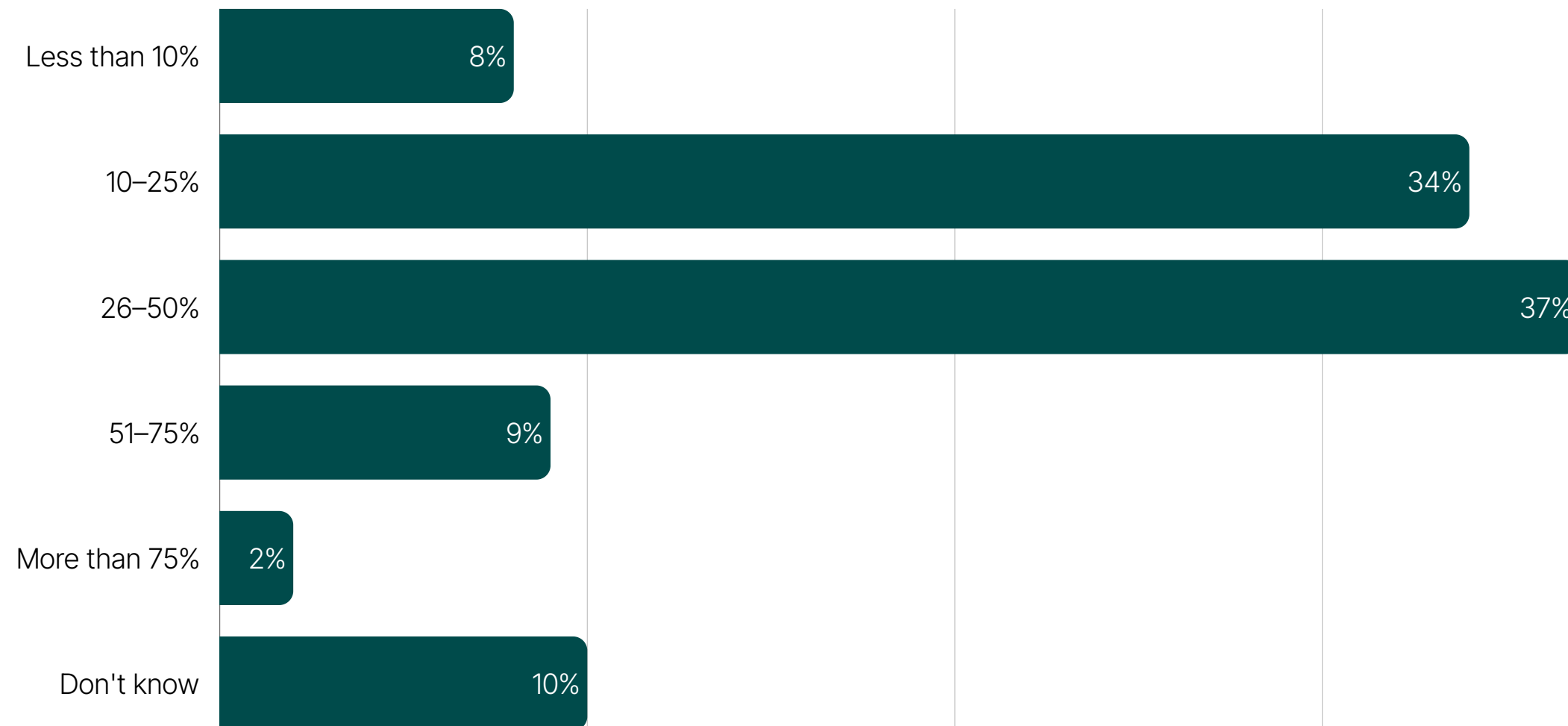
Source: buyers N=156.



- Only a small share of buyers switch regularly because a vendor is more innovative, independent of price or service: innovation alone is rarely a reason to give up the certainty of a trusted party.
- That fits the broad preference for well-known, established vendors over a more innovative alternative.
- For vendors that compete mainly on innovation, this means innovation can open the door, but is rarely on its own the trigger that leads to an actual switch.
- To win as an innovator, you'll also need to remove the risk of leaving a trusted party. For example, with evidence, references, or a lower barrier to entry, not just with a more innovative product.

How much of the offering is new?

% of the security stack made up of solutions purchased new in the past 2 years



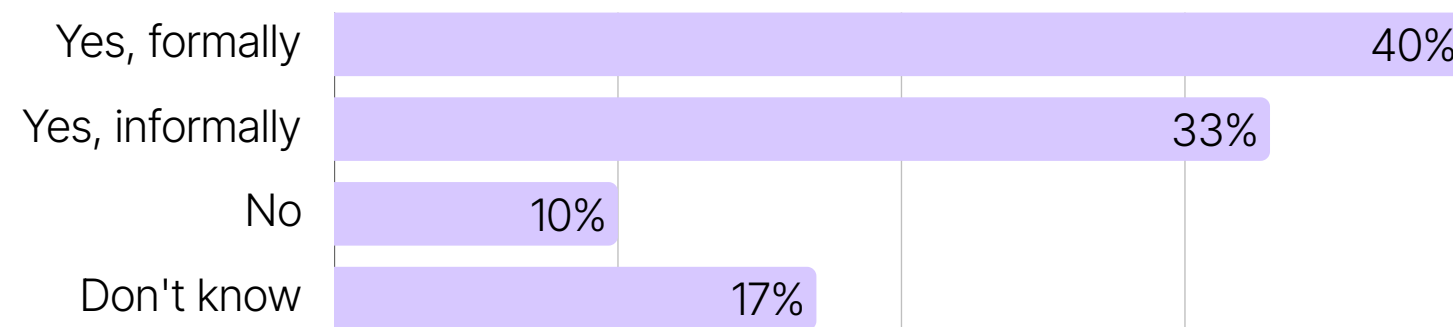
Source: buyers N=156.



- A significant part of buyers' security stacks now consists of recently purchased solutions: for a large share of organizations, a quarter to half of the stack has been refreshed in the past two years.
- Still, renewal mostly remains additive, not a replacement: for most buyers it involves a substantial part of the stack, not a complete overhaul. Very high renewal percentages are rare.

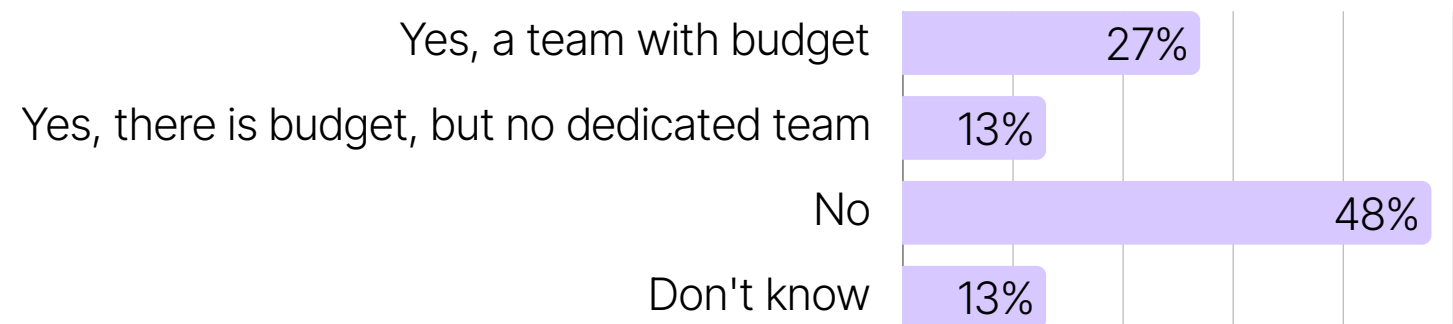
How do vendors organize their innovation?

Documented innovation strategy



Source: vendors N=48.

Is there a team with budget for innovation?



Source: vendors N=48.



- For most vendors, innovation is a strategic theme on paper, but without a dedicated team or budget it has to constantly compete with the day-to-day.
- As a result, innovation often just rides along within normal product development, instead of getting a place of its own.
- This also shows in where vendors get their ideas from: not from structured market research, but mainly from loose customer feedback and assumptions within their own team.
- Without dedicated room for innovation, there's no time to systematically gather what's going on: whichever customer last spoke up ends up filling that gap by default.

Innovation: structural, or just scattered efforts?

49%

of vendors fund innovation entirely from their own operating profit. Venture capital or subsidies play almost no role.

Source: vendors N=48.

60%

of vendors have no separate team or budget for innovation. It simply runs alongside regular product development.

Source: vendors N=48.

40%

of vendors have an extensively documented innovation strategy with concrete goals; for the rest it stays informal or ad hoc.

Source: vendors N=48.

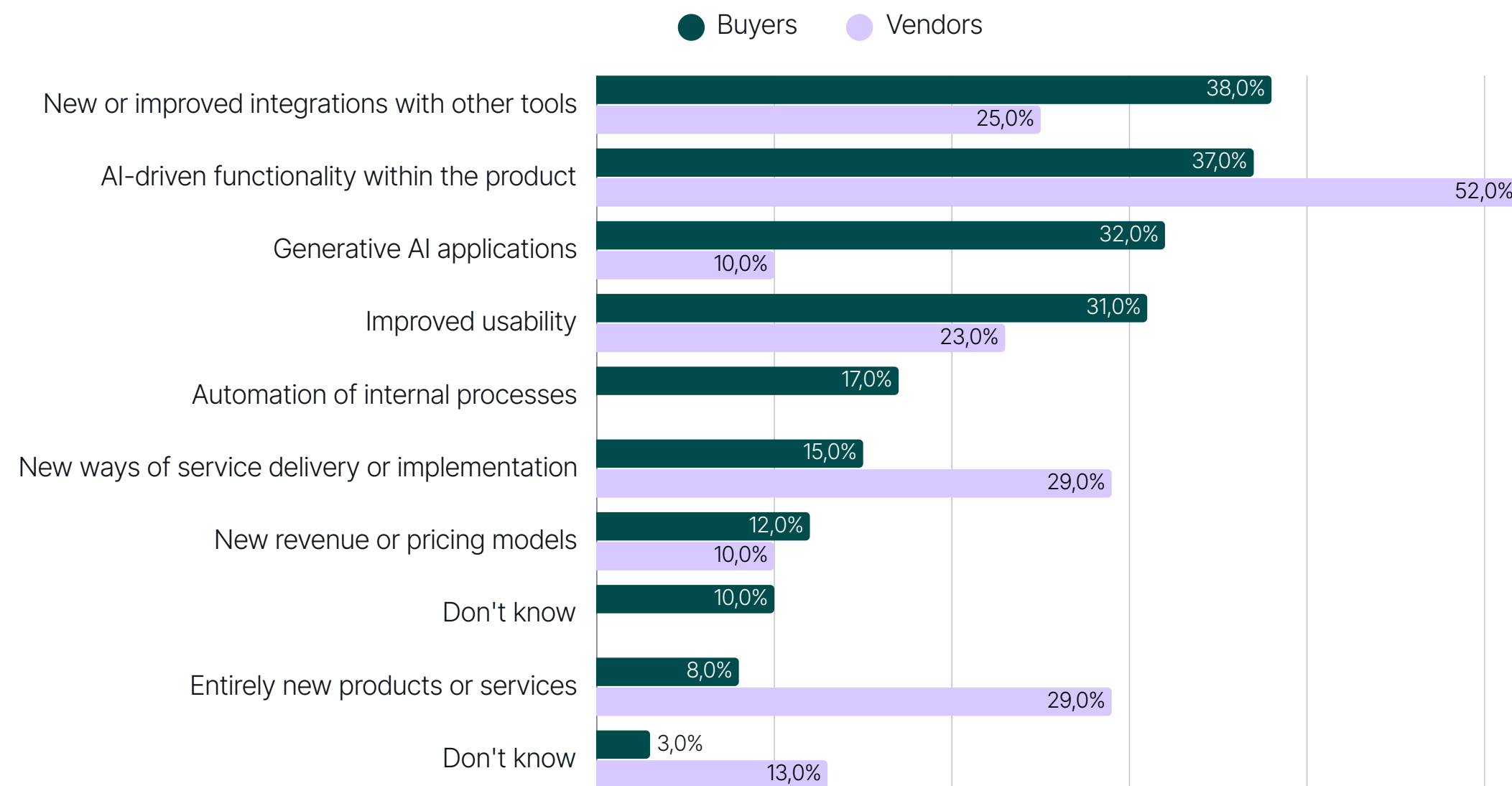
Productontwikkeling

7,3



is the average score buyers give to the products and services of their current security vendors.

What vendors are developing vs. what buyers want



Source: buyers N=156, vendors N=48.



- Vendors are investing heavily in AI-driven functionality, while buyers cite that type of innovation far less often as something they want to see more of. That may be because for buyers, AI is more a means than an end in itself: they'd rather ask for the outcome (faster detection, less manual work) than for the technology behind it.
- Buyers, in fact, mostly ask for better integrations with other tools and platforms, while vendors invest relatively little in that: exactly where demand is highest, supply is lowest.
- This mismatch cuts to the core of product development: vendors build what's technologically possible, buyers ask for what practically works in their existing environment.

Where does input for new features come from?

73% of vendors do no structured customer and prospect research.

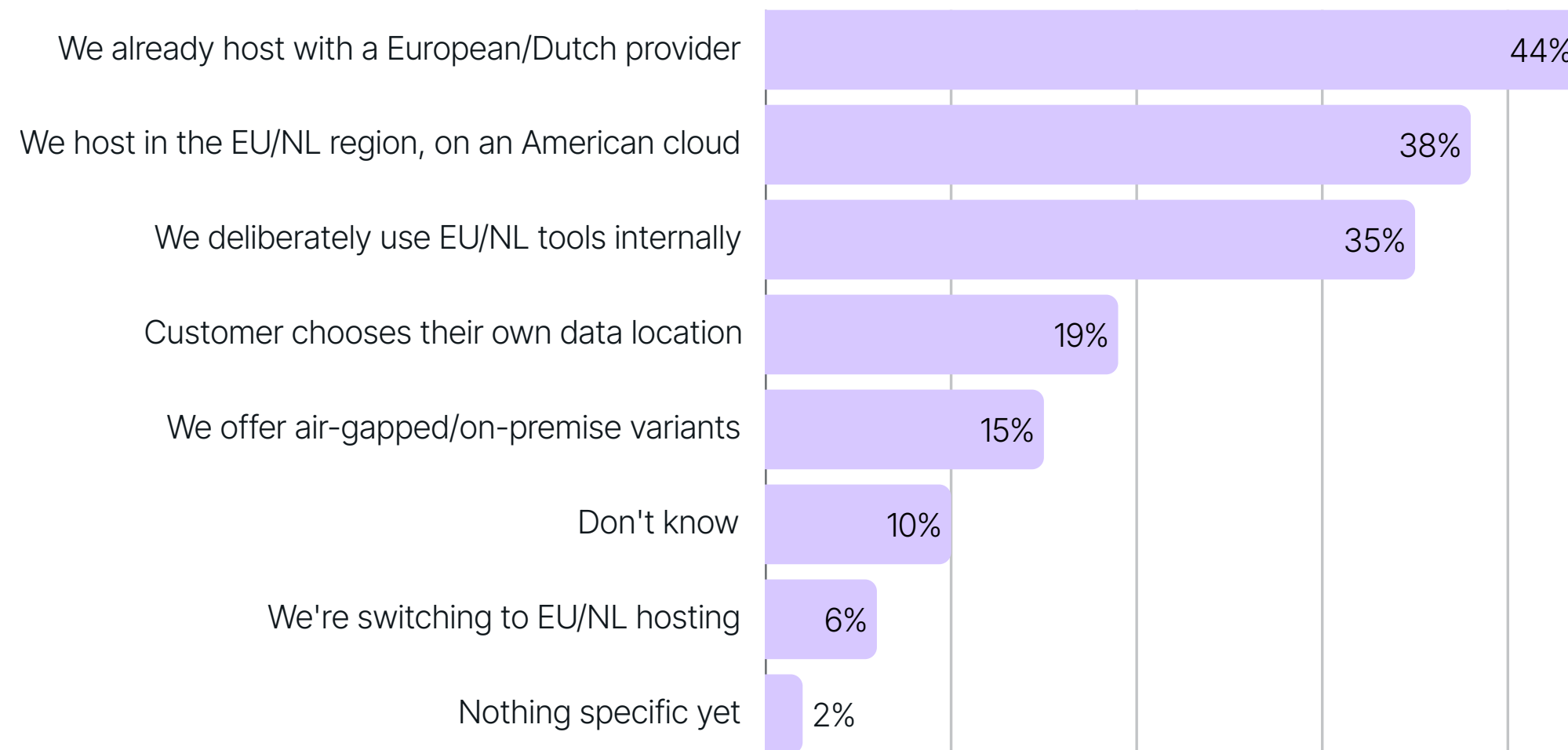
40% rely mainly on their own R&D, which points to a technically driven way of innovating.

75% work based on loose, unstructured customer feedback and assumptions and insights from their own team.

Source: vendors N=48.



Are vendors making their own product more sovereign?

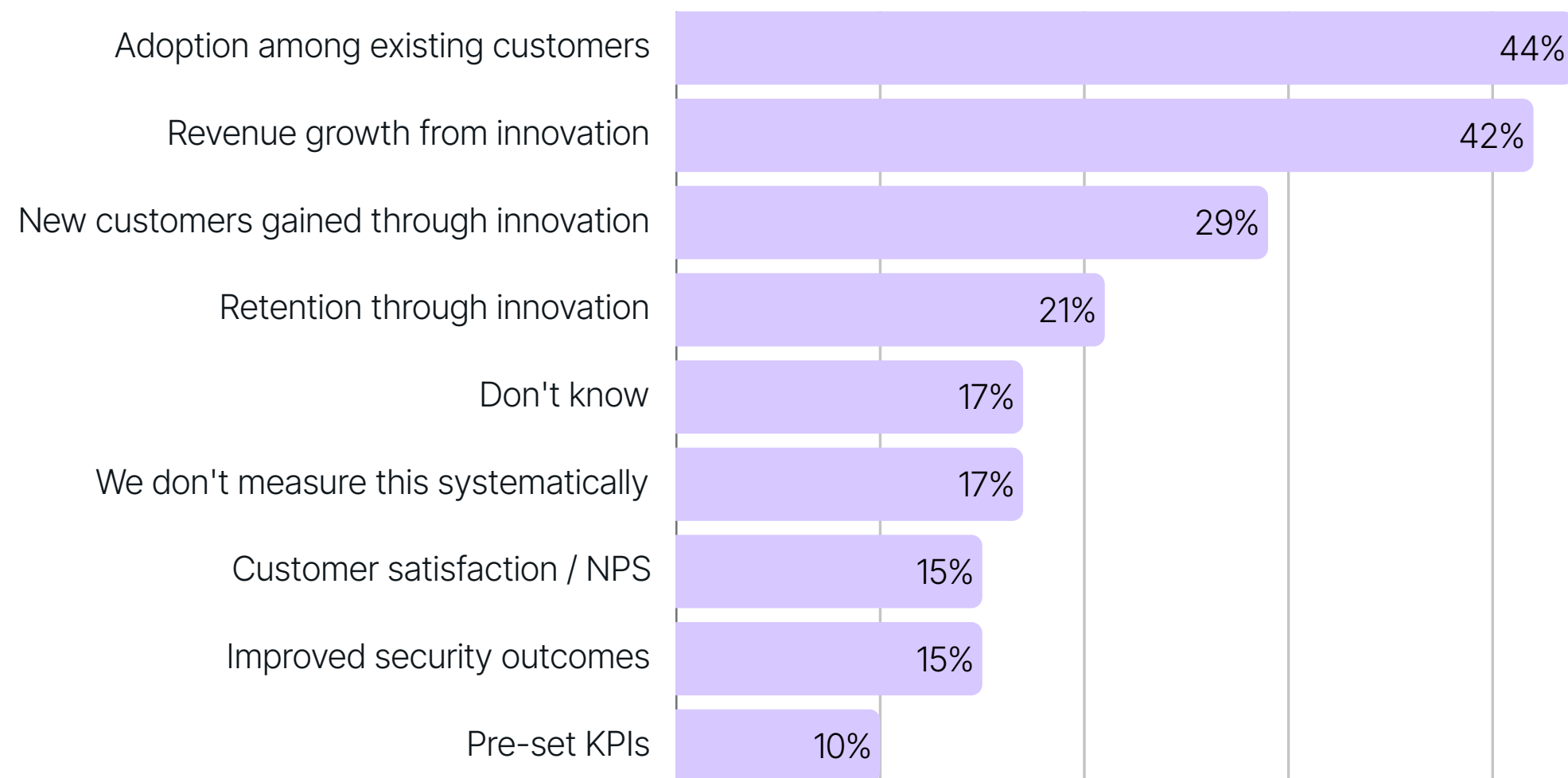


Source: vendors N=48.



- Almost half of vendors host entirely within Europe, with no American cloud service anywhere in the chain. A slightly smaller share hosts within the EU, but through an American cloud provider: data in Europe, infrastructure in American hands.
- Of the rest, only a fraction is actively working on making the switch: most stay with their current setup, despite the clear demand from the market.
- That contrasts with what buyers said earlier: many explicitly ask about origin and data storage, and for a large group it's even a hard requirement.

How do vendors measure the success of innovation?



Source: vendors N=48.



- Vendors mostly measure innovation by what it delivers for themselves (adoption, revenue), not by what it delivers for customers: improved security outcomes or satisfaction rank at the bottom, even though that should be the core purpose of a security product.
- Without a shared measurement standard, every innovation claim is hard to compare: if one vendor measures success by revenue and another by adoption, "our innovation works" means something different from one vendor to the next.
- The fact that a significant share doesn't measure systematically fits the broader picture of innovation without a separate budget or team: what isn't set up as a distinct process also isn't tracked as a distinct result.

How buyers explore new solutions

1 in 3 times, a buyer considers a vendor because the vendor already knew the company or a peer recommended it.

How do buyers and vendors stay informed?



- How do you reach buyers? If you do it through the channels where you as a vendor are yourself most active, or through research you consult, you miss the right audience: market research reports and whitepapers weigh more heavily for vendors than for buyers.
- You see the same inside-out perspective in networking with colleagues and peers: vendors lean on this more heavily than buyers themselves report doing.

How vendors make the shortlist

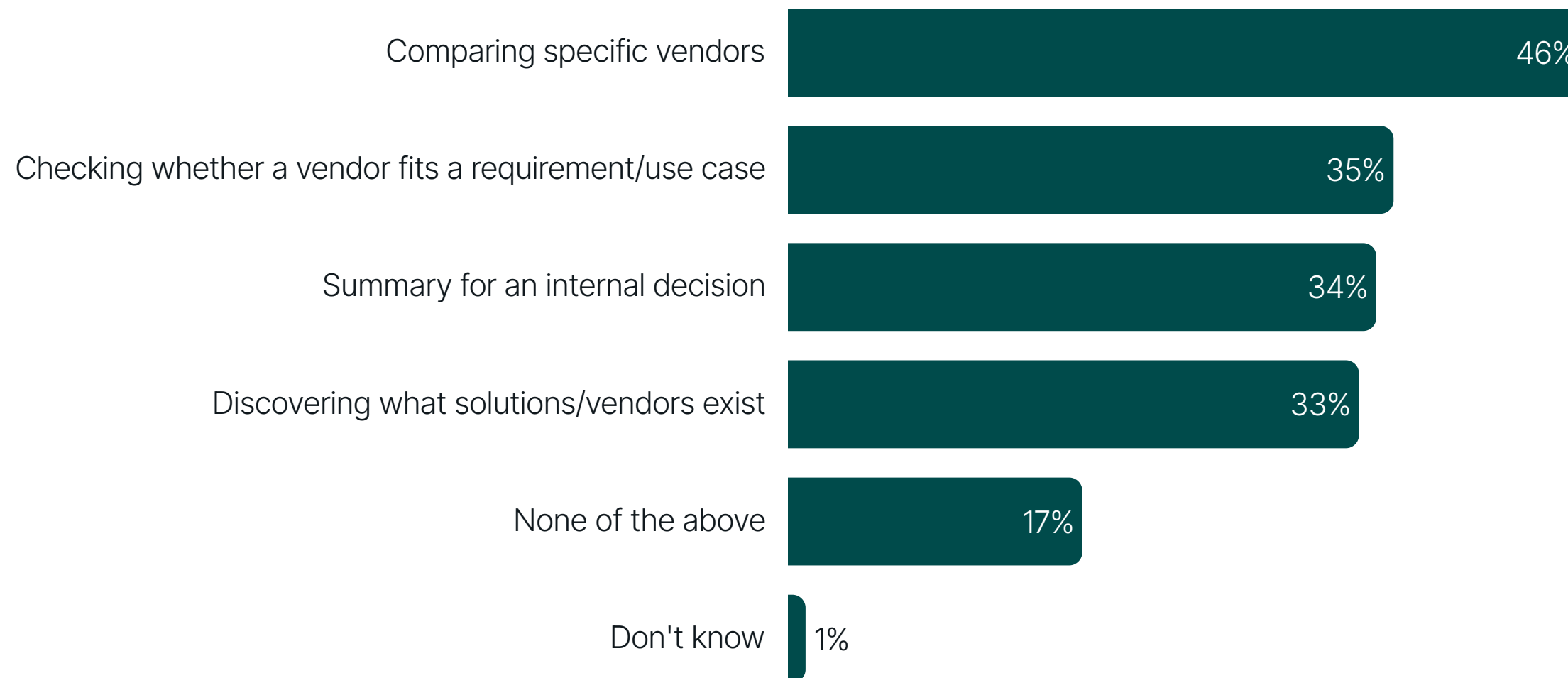


Source: buyers N=156.



- Personal network and familiarity are the most important routes onto the shortlist, ahead of one's own research or a standout message.
- Consultants and implementation partners play a substantial role as intermediaries: their recommendation carries as much weight as a well-attended event or trade show.
- New channels such as AI tools are still in their infancy, far behind the traditional routes of network and experience.
- Cold outreach is one of the least-cited routes to the shortlist, even though more than a quarter of vendors invest heavily in it.

What buyers use AI tools for in vendor research



Source: buyers N=156.

- AI tools aren't an important channel for keeping up with trends (page 29), but they play a clearer role once buyers get down to actual comparing.
- AI is mainly used after the shortlist already exists; to test and substantiate, not to discover new tools: it reinforces a decision that largely already came about through network and recommendation, rather than replacing that route.
- Still, a significant share of buyers don't use AI tools for this at all, which fits the broader picture that personal network and existing familiarity remain the dominant route to a vendor.

Spotlight: are vendors leaning too much on sales outreach?

23%

of vendors rely heavily
on sales outreach.

Source: vendors N=48.

83%

of buyers are approached by
sales teams at least monthly.

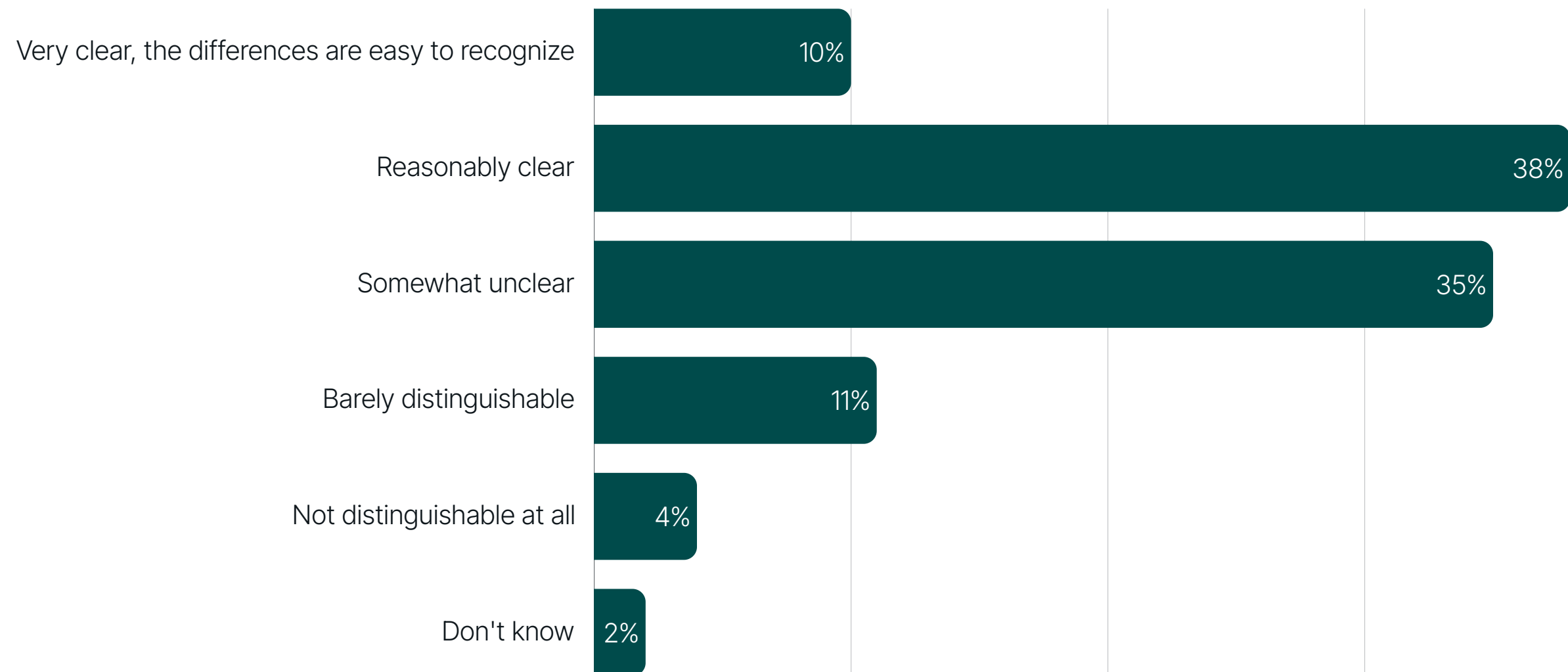
Source: buyers N=156.

28%

of buyers block, mark as spam, or
almost never respond to cold
outreach.

Source: buyers N=156.

Do vendors differentiate themselves enough?



Source: buyers N=156.



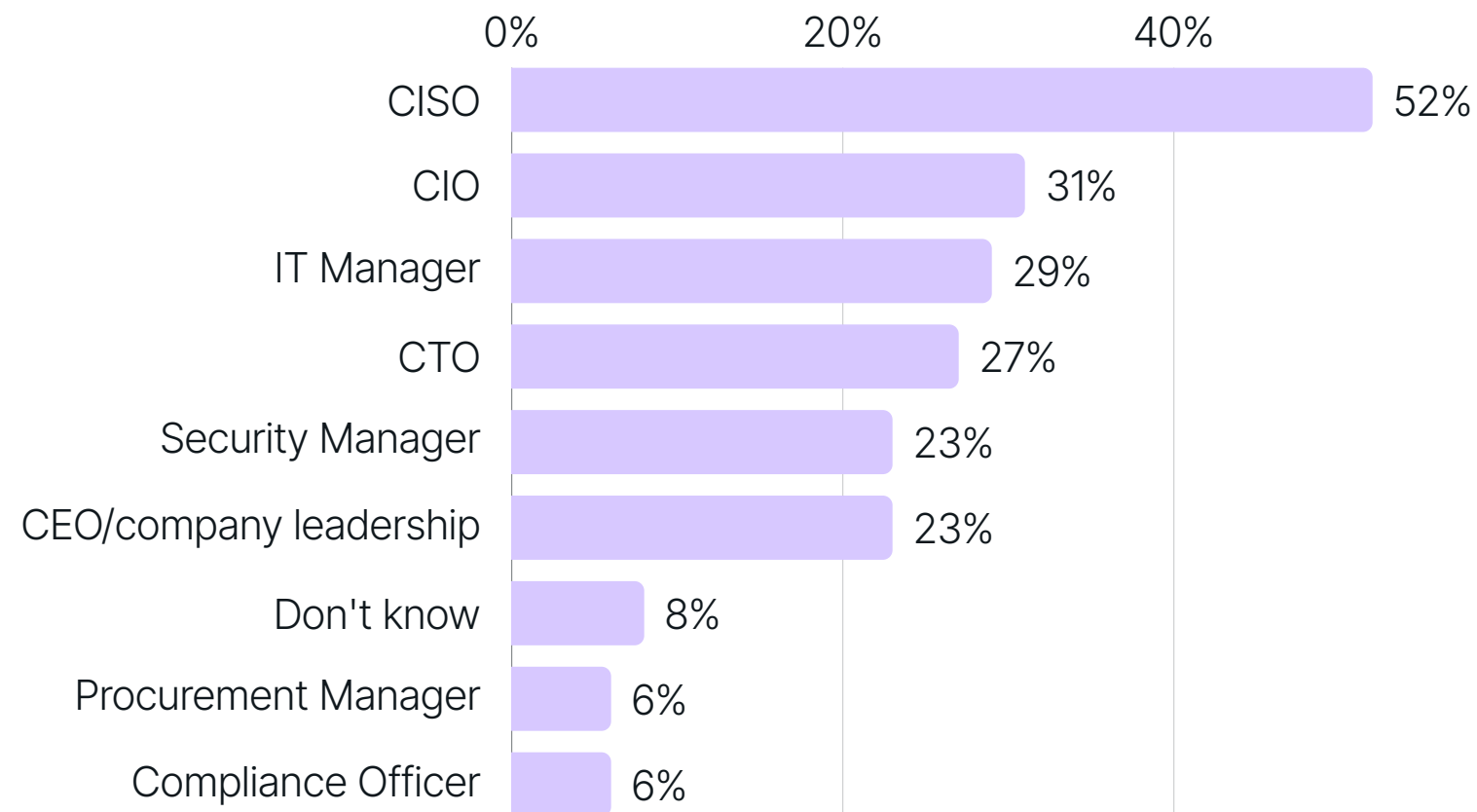
“Clearly demonstrate your differentiating strengths.”

Anonymous tip from a buyer to a vendor, open field in the buyer survey

- Buyers are roughly evenly split between being able to clearly distinguish vendors and not, with a very clear distinction being the absolute exception.
- That fits the earlier picture around AI: for many buyers it's mainly marketing, not a genuine differentiator.
- Whoever does succeed at this has a real chance to stand out in a market where most vendors still haven't managed it.

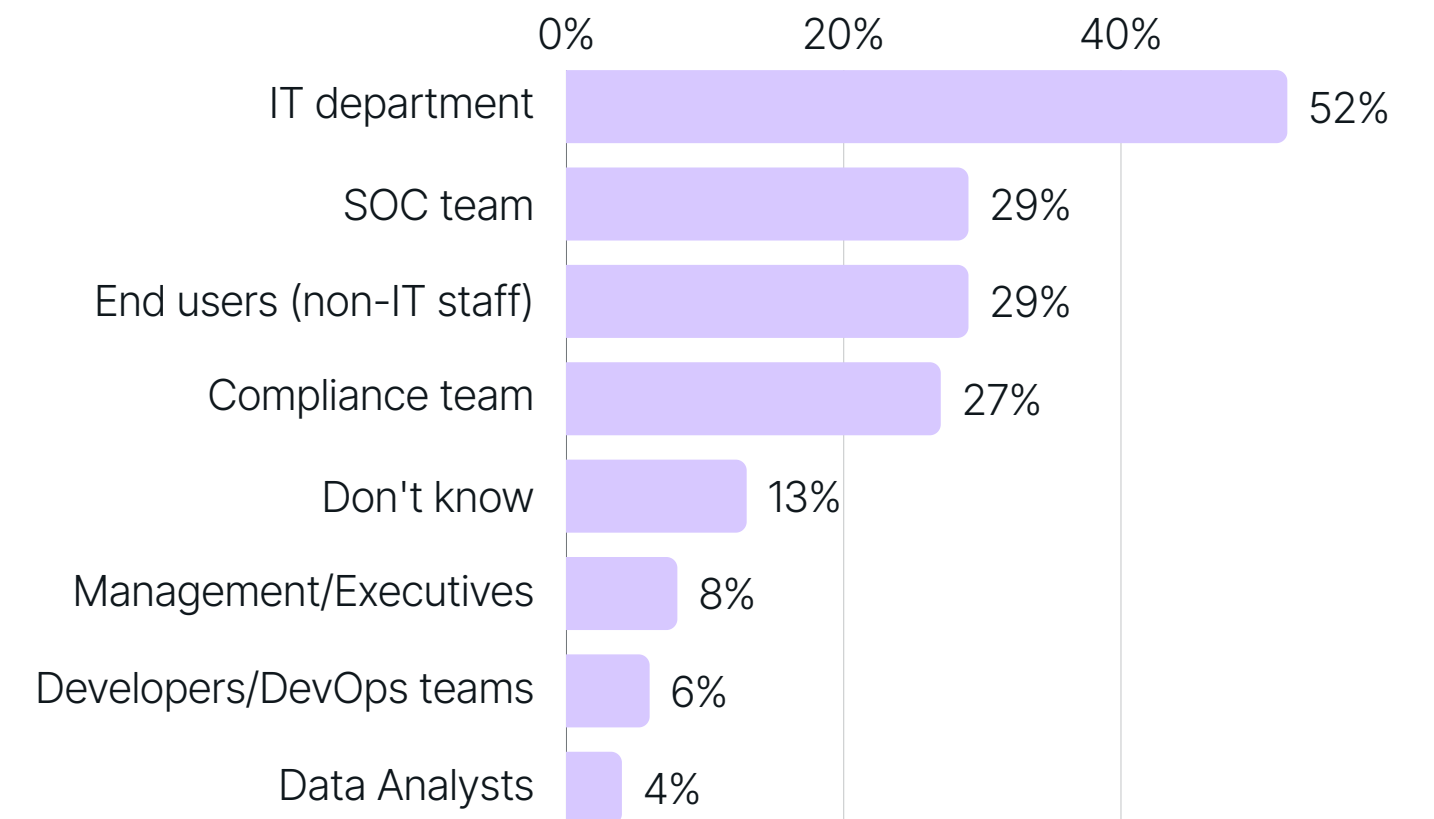
Who decides, and who uses the product?

Decision-maker



Source: vendors N=48.

User



Source: vendors N=48.

How do buyers evaluate new solutions?



Source: buyers N=156.

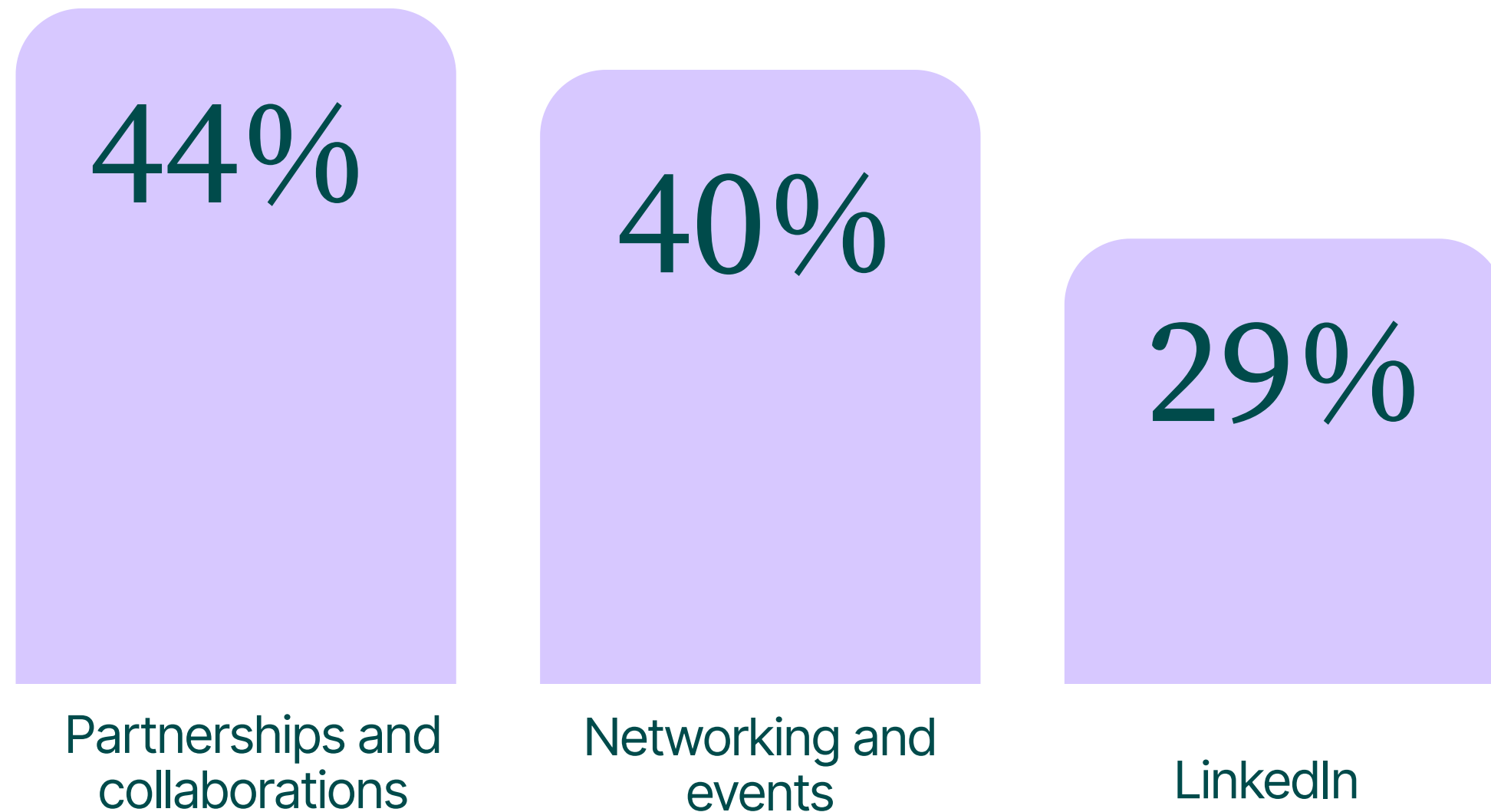


"Sales staff often don't have enough knowledge and push the product too hard without truly engaging with the issues that matter."

Written by a buyer in an open field

- Buyers like to do their own research through a variety of methods, with no single method dominating.
- Contact with vendor sales teams sits at the bottom of the list, and that's no coincidence: in the open-ended answers, buyers regularly complain about a lack of technical knowledge among sales staff and about pushing their own solution too quickly instead of really listening to the question.

Which channels generate new customers?



Source: vendors N=48.

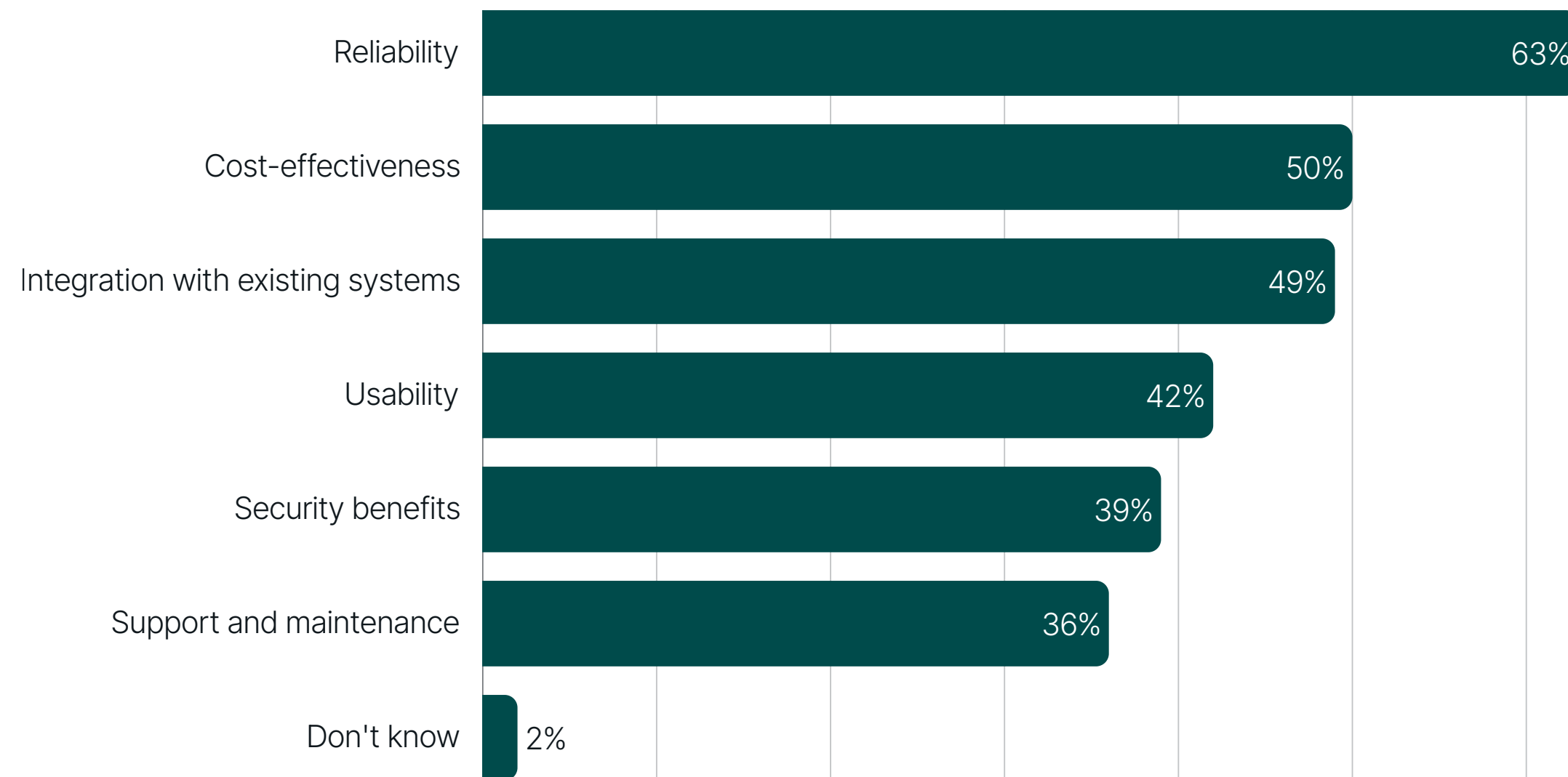


- Partnerships and events together account for the largest share of new customers, far ahead of channels like email marketing or cold outreach.
- That fits what buyers themselves report: they mostly find vendors through a peer's recommendation or because they already knew the vendor, not through direct marketing efforts.
- LinkedIn follows in third place: as the largest B2B platform, it remains a way to stay visible and to build and maintain contact with potential customers.

How are products evaluated?

4 in 10 buyers cite pushing your own solution, regardless of fit, as a major to very major frustration: the best sales advice remains to listen, not to persuade.

Criteria used to evaluate solutions

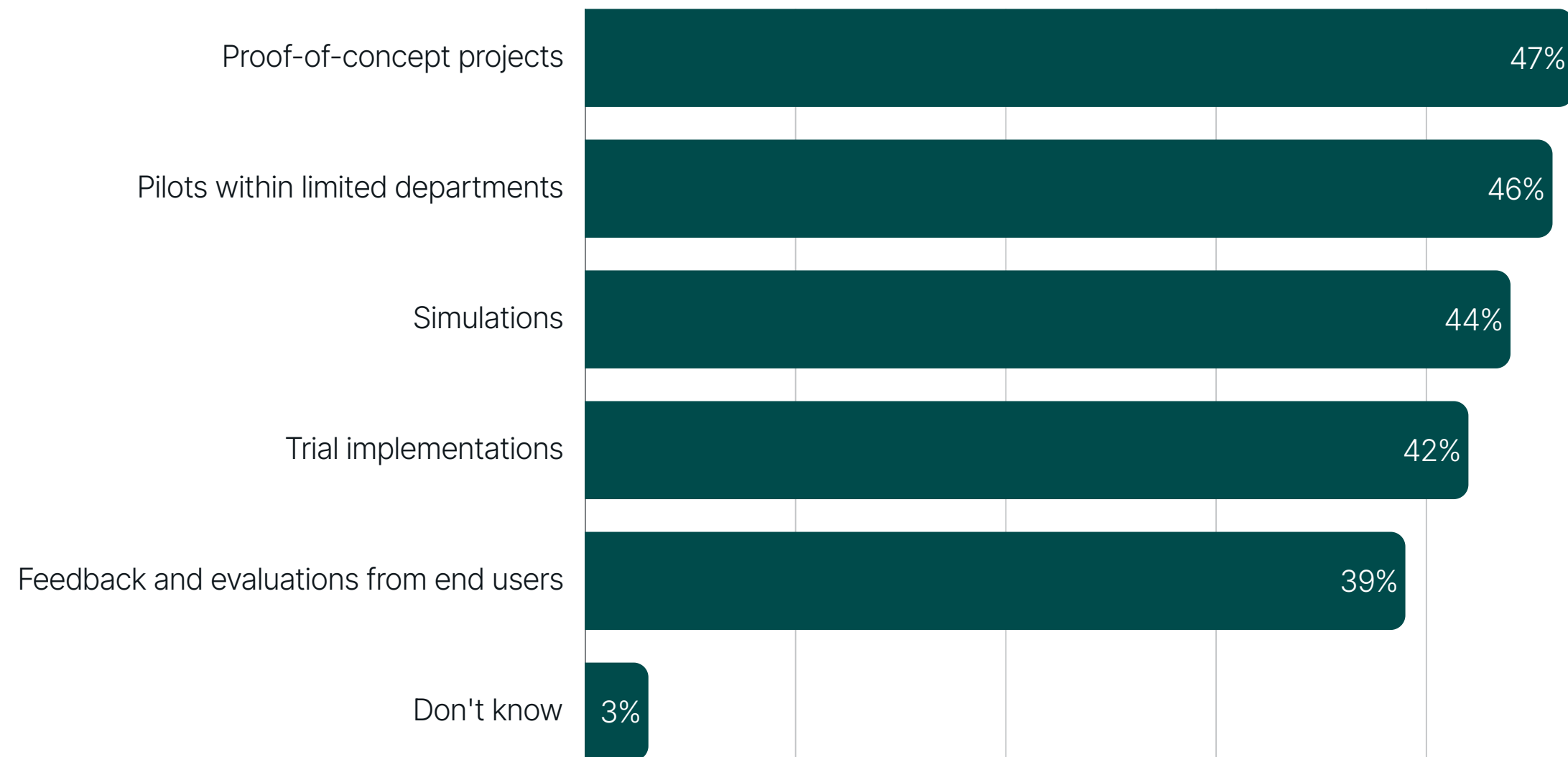


Source: buyers N=156.



- Reliability clearly tops the list as an evaluation criterion, ahead of cost, integration, and ease of use: buyers choose on certainty first, then everything else.
- Price isn't decisive: cost-effectiveness ties for second place with integration, meaning a cheap solution that doesn't fit the existing stack gets ruled out just as fast as an expensive one.

Which criteria carry weight when evaluating?

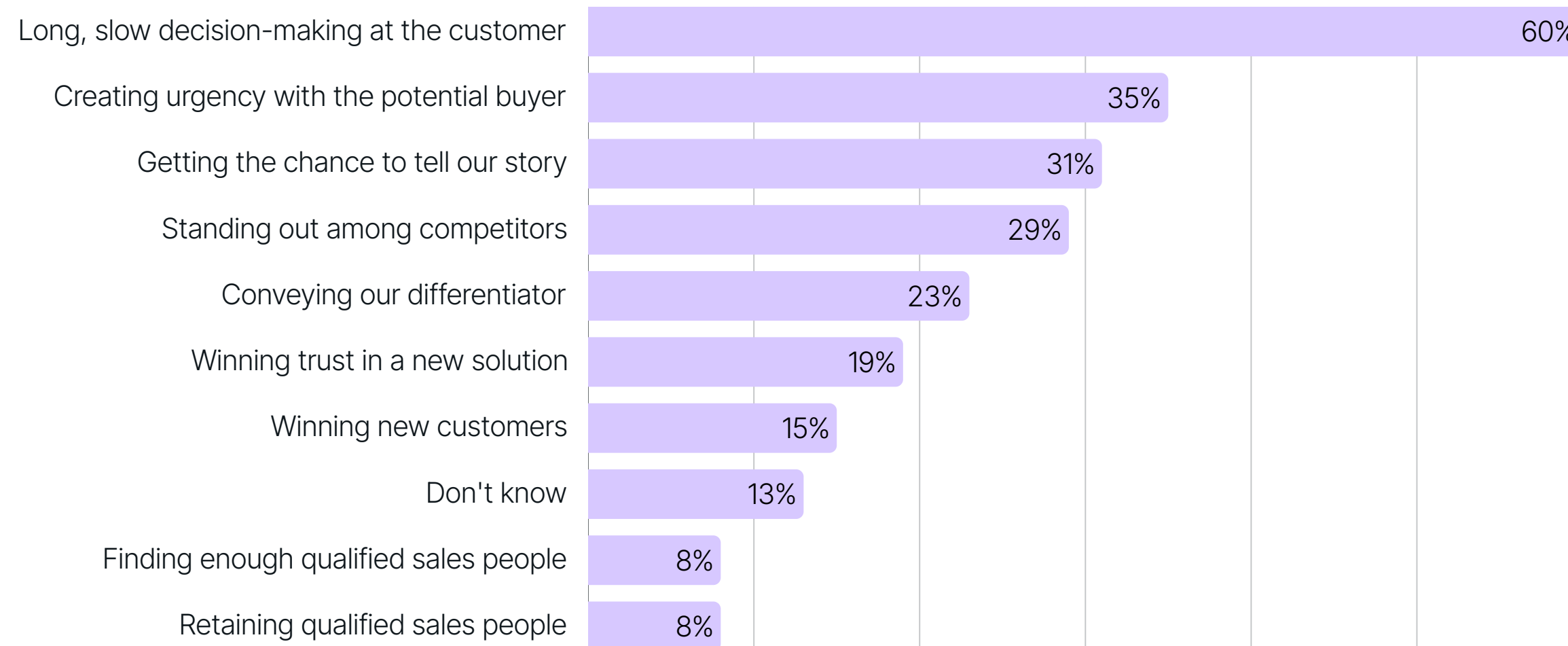


Source: buyers N=156.



- Buyers never test in just one way: proof of concepts, pilots, simulations, and trial implementations all sit within a few percentage points of each other, which means most organizations run multiple test methods at once rather than relying on a single proven approach.

Where does the sales process get stuck, from the vendor's perspective?



Source: vendors N=48.



- Slow decision-making at the customer is by far the biggest sales challenge, confirming what buyers themselves already indicated: delays in purchasing mainly sit within their own organization, not in how vendors sell (page 17).
- Vendors experience less of a problem with selling themselves than with the customer failing to move forward.
- Sales capacity, both finding and retaining good people, is surprisingly the least-cited challenge: so the bottleneck isn't with the team itself, but with the process on the other side of the table.

How do vendors primarily sell their product?

Primary sales channel	% of vendors
Direct via own sales team	69%
Via partner channels and resellers	40%
Subscription model	23%
Online via own website	17%
Don't know	10%
Trial followed by paid version	8%
Marketplace (e.g. AWS, Google Cloud)	4%
White-label partnerships	4%
Bundling with other software	2%

Source: vendors N=48.



- Sales run predominantly through people, not scalable channels: direct in-house sales teams and partner channels dominate, while marketplace, freemium, or bundling are rare.
- That fits the type of offering in this sample: with many MSSPs and consultancy/advisory firms alongside software vendors, it's often about custom work or ongoing service delivery — a category that doesn't lend itself well to self-service sales anyway.
- Still, that doesn't explain everything: even among the software vendors themselves, scalable routes like trial-to-paid or freemium are barely used, even though they could have worked for part of their offering.

Frustrations on both sides

Buyer frustrations

- | | | |
|---|--|-----|
| 1 | Insufficient technical knowledge on the sales team | 69% |
| 2 | Pushing their own solution, regardless of whether it truly fits us | 67% |
| 3 | Lack of transparency about pricing or terms | 65% |

Source: buyers N=156.

Vendor frustrations

- | | | |
|---|---|-----|
| 1 | Buyers who are slow to decide or go silent for long after a demo or conversation | 71% |
| 2 | Buyers who compare only on price, not value or quality / No clear mandate or decision-maker on the buyer's side | 67% |
| 3 | Buyers who mainly use us to compare prices, without serious buying intent | 65% |

Source: vendors N=48.

How is collaboration going?

More than half of buyers cite a well-functioning product as what they value most about their vendor, versus only 5% who cite innovation as a strength.

Where does the offering fall short?

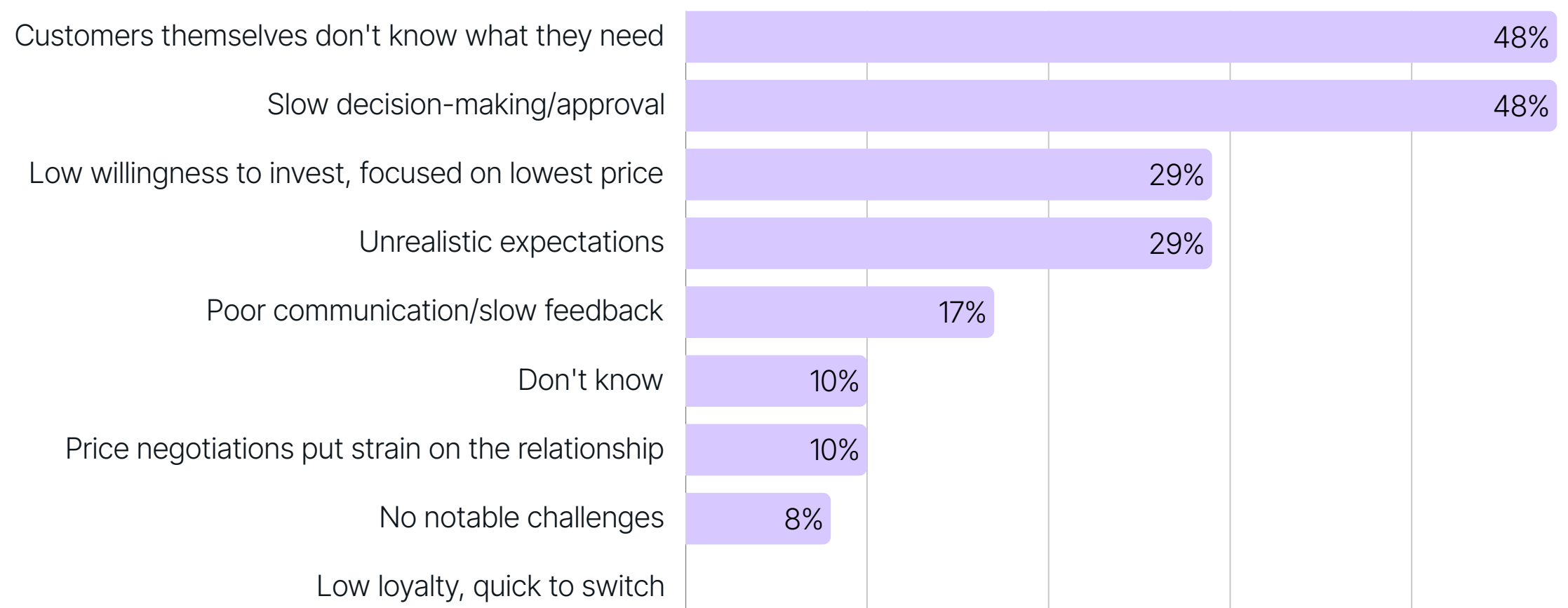
Biggest shortcomings of current security vendors	% of vendors
Insufficient technical integration with our existing environment	33%
Standard, one-size-fits-all products that don't fit our situation or company culture	30%
Limited functionality or features compared to what we need	28%
Outdated technology that doesn't keep up with the latest developments	22%
No notable shortcomings	21%
Insufficient scalability or performance as we grow	15%
Poor usability of the product	11%
Don't know	5%

Bron: kopers N=156.



- Integration isn't just the most-cited selection criterion (page 24), it's also the biggest complaint afterward: buyers explicitly look for it when purchasing, yet a significant share still find it lacking in practice.
- The second-biggest complaint, standard products that don't fit the situation, aligns with buyers' biggest frustration with their vendor: pushing their own product regardless of fit.
- A sizable group sees no notable shortcomings, which means the complaints are heavily concentrated among a subset of buyers: it's not that everyone is dissatisfied, but for those who are, it often comes down to the same points.

What makes collaborating with customers difficult, from the vendor's perspective?



Source: vendors N=48.



- Slow decision-making shows up here for the third time as a bottleneck, now from within the collaboration itself: it confirms that delay on the customer's side is a recurring pattern.
- The fact that customers themselves don't clearly know what they need sits uneasily alongside buyers' complaint that vendors push standard solutions without listening: without a sharp, well-defined request, custom work is also hard to deliver.
- What's notable is what doesn't score: vendors don't experience a problem with customer loyalty. So customers don't leave quickly.

What vendors think holds customers back

Barriers vendors see on the customer side	% of buyers
Lack of knowledge and skills within the team	48%
Lack of capacity	42%
Lack of time	25%
Lack of budget	25%
Lack of buy-in and speed in decision-making	25%
Other priorities, such as getting the basics in order first	25%
Risk-averse culture (fear of making mistakes or trying something new)	19%
Unclear business case or ROI (not knowing what it delivers)	15%
No good integration with existing systems (legacy systems that don't cooperate)	8%
Don't know	8%

Bron: leveranciers N=48.



- Vendors attribute the delay mainly to the customer themselves, and that picture turns out to be strikingly accurate: it lines up directly with what buyers themselves already said about their biggest internal bottleneck.
- Yet that agreement is one-sided. Where buyers cite integration problems as the biggest shortcoming of their vendor, the vendor itself barely sees that as something the customer runs into: their own role in the delay stays out of view.

What actually makes the collaboration work well?

Vendor strengths, according to buyers

- | | | |
|---|---|-----|
| 1 | The product/service simply works well and does what it's supposed to do | 51% |
| 2 | Customization and solutions that fit our situation and company culture | 43% |
| 3 | Good integration with our existing environment (e.g. with Azure Security) | 41% |

Source: buyers N=156.

What makes a collaboration pleasant, according to vendors

- | | | |
|---|---|-----|
| 1 | The customer approaches the collaboration as a partnership, not purely sales- or price-driven | 48% |
| 2 | The customer has clear, realistic expectations of what the product or service can deliver | 42% |
| 3 | The customer has enough in-house knowledge to collaborate quickly and effectively | 35% |

Source: vendors N=48.

CONCLUSION

The state of innovation: wanted, but not organized

- Customers ask for innovation, but buy on certainty: a more innovative product rarely beats a trusted name with a proven track record.
- For many vendors, innovation isn't a set-up process but something that happens on the side: without budget, team, or strategy it stays a scattered effort rather than a structural approach.
- Vendors complain about slow customers, customers complain about vendors who don't listen: the same distrust, seen from two sides. As long as both parties keep pointing at each other, that's just as much of a blockage as budget or regulation.



In closing: tips both ways

Tips from buyers to vendors:

- ➔ "Be more transparent from the start, with clear practical examples and pricing structures, and simplify the contract process so projects can get started faster."
- ➔ "Listen better in practice. Make services simpler, manageable, transparent on cost, and use as little marketing language as possible. Security teams need solutions that demonstrably reduce risk, not add to it."
- ➔ "Come prepared upfront with clear terms, risks, and a price list."
- ➔ "Make sure your sales people truly understand the product."

Tips from vendors to buyers:

- ➔ "Take the time to make the right choice, one that isn't primarily based on price."
- ➔ "We appreciate it when technically minded people join the conversations. It helps make real progress in the initial discussions."
- ➔ "Stay open to innovative technology and engage in the conversation."
- ➔ "There's no magic solution, it all comes down to successfully embedding the tool/service in the organization together."
- ➔ "Stay open to talking with new companies."

What stands out is that both sides are asking each other almost the exact same thing. Buyers want transparency, vendors want buyers not to be misled by a lack of transparency (marketing talk). Buyers want vendors to stop offering one-size-fits-all, vendors want buyers to stop automatically choosing the well-known name. So these aren't two separate lists: both sides experience the same lack of mutual trust and customization.

Methodology and appendices

This research was conducted among 156 buyers (CISOs, IT managers, and security professionals) and 48 vendors of security products and services in the Netherlands. Compared to The State of Innovation 2025, when 20 security professionals and 11 vendors were surveyed, this year's sample is considerably larger. In 2025 the survey results were supplemented with in-depth interviews to cross-check the answers; this year we opted for a larger quantitative sample instead.

Buyers: Respondents are predominantly IT managers and CISOs/Security Directors, supplemented by IT directors, CIOs/CTOs, SOC managers, and security professionals - together covering the entire security purchasing decision process. The majority work at organizations with more than 50 employees.

Vendors: More than 60% of vendor respondents are owner, founder, C-level, or consultant/advisor - a predominantly senior group. Software vendors form the largest category, followed by consultancy/advisory firms and MSSPs. Most organizations have been active for more than 10 years.

Limitations

- The larger sample compared to 2025 makes year-over-year comparisons less direct.
- Among vendors, the group of 44–48 respondents is small; breakdowns into subgroups are indicative only.
- Participation was voluntary, which may over-represent organizations already actively engaged with security.

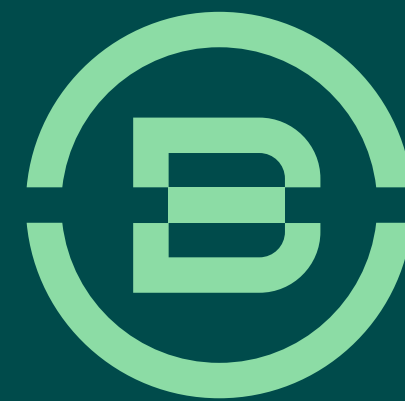
About the research firm

Beyond Products is a Dutch marketing and research agency for the cybersecurity and IT sector.





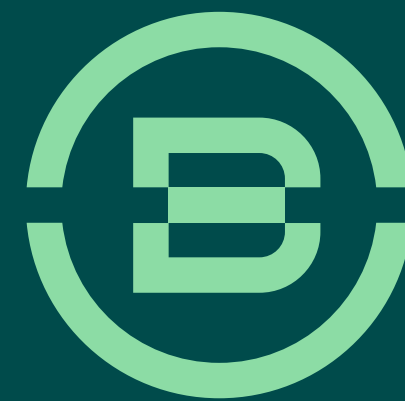
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