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Canalys Global Cybersecurity Leadership Matrix 2023

Cyber-attacks continue to cause much disruption around the world. Supply chain attacks, exploitation of software vulnerabilities, the shutdown of critical infrastructure and the fallout from cyber-warfare demonstrate persisting weaknesses in cybersecurity defenses. Organizations need partners more than ever to increase their cyber-resilience and neutralize threats.

But cybersecurity partners have diversified with different business models, expertise and specializations. They are part of a broader ecosystem, consisting of different, but interrelated components, including threat actors, cyber-insurers, technology vendors, investment firms, law enforcement agencies and government bodies that operate in a framework of strengthening regulations.

Vendors that support multiple partner types enable them to adopt a more consultative-led approach, demonstrate expertise and specialize in new growth segments, extend beyond protection to detection and response, integrate with different marketplaces and platforms, and deliver scalable managed services will be better placed to succeed in the highly competitive and fragmented cybersecurity market.

Global Cybersecurity Leadership Matrix
2023

Eight vendors achieved Champion status in the 2023 **Canalys Global Cybersecurity Leadership Matrix**, which reflected not just the highest levels of excellence in channel management and market performance, but also ongoing momentum in the cybersecurity ecosystem. The eight are: **Check Point**, **Cisco**, **CrowdStrike**, **ESET**, **Juniper Networks**, **Palo Alto Networks**, **Trend Micro** and **WatchGuard**. This was based on feedback from channel partners via the Candefero Vendor Benchmark, vendor performance via Canalys quarterly shipment estimates and analyst insight to determine the position of vendors. Vision, leadership, competitiveness, partner initiatives and enablement within the ecosystem, as well as the impact of external factors, were assessed to determine channel leadership and performance over the last 12 months.

The Leadership Matrix considered 30 cybersecurity vendors. Inclusion was based on vendors meeting two thresholds: a minimum annual revenue of US$200 million from cybersecurity, excluding professional services, and more than 50% of business going through the channel.
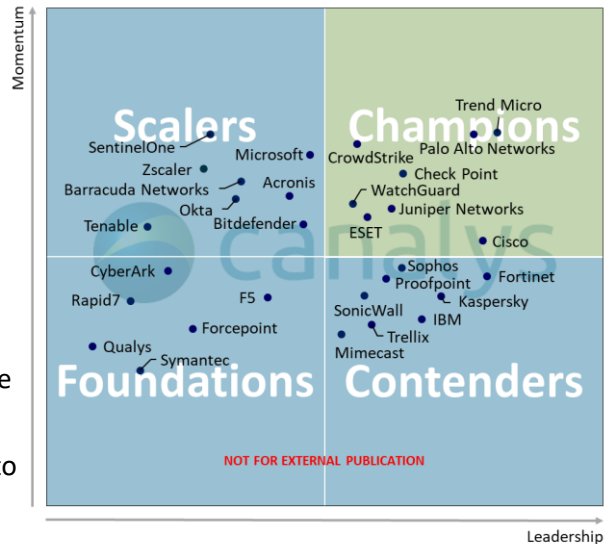
Global Cybersecurity Leadership Matrix: Champions 2023

Champions in the Cybersecurity Leadership Matrix have a combination of the highest and most consistent scores in the Candefero Vendor Benchmark, generated growth and profits for partners, and have maintained strong momentum. 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. Champions are thought-leaders in the channel and drive innovation to boost partner engagement.

Performance highlights: **Champions**

Check Point, **ESET**, **Juniper Networks**, **Palo Alto Networks**, **Trend Micro** and **WatchGuard** reaffirmed their positions as Champions and are joined by **Cisco** and **CrowdStrike** in the 2023 edition of the Cybersecurity Leadership Matrix. Key investment priorities across the leading vendors during the review period included:

- Enhancing the partner program experience from registration to progression to higher program tiers.
- Enabling partners to transact predictably and profitably across cloud marketplaces.
- Restructuring program frameworks to accelerate the development of multiple partner types.
- Recognizing the role of partners that influence deals and for co-selling and co-delivering.
- Automating processes to improve competitiveness and ease of doing business for partners.
- Simplifying the development of partners' cybersecurity managed services with flexible payment and multiple SOC options to advance detection and response capabilities, as well as professional services.
- Driving partner profitability and sales of new technologies through targeted rebates and incentives.
- Accelerating the transition to subscriptions and different consumption-based models.
- Securing net new customer wins and renewals of existing accounts with enhanced deal registration.
- Increasing cross-sell and upsell opportunities through improved analytics and partner collaboration.
- Broadening partner ecosystems to support consultants, cyber-insurers and incident responders.
- Scaling the creation and dissemination of digital content for lead generation.
- Advancing partners' cybersecurity skills and capabilities through specializations and accreditations.

Cisco progressed with the transformation of its cybersecurity business. Leadership and operational changes, simplification of engagement, platform enhancements and major investment via acquisitions, combined with its partner-led approach, place it in a strong position to capitalize on gaining share in the ecosystem.

Check Point strengthened its position in the cybersecurity ecosystem, as it optimized engagement and enablement processes within its partner program to capitalize on key growth areas, including MSSPs. Its quality of account management and technical support continued to be highly rated by partners.

CrowdStrike increased its importance in the cybersecurity ecosystem over the last 12 months through continued investment in its partner program and supporting multiple partner types. Partner growth accelerated, driven by new customer wins, and upselling and cross-selling on its expanding Falcon platform.

ESET's consistency of engagement and support, as well as focused partner enablement to run campaigns and execute sales initiatives relevant to local strengths, were key contributors to its success in the channel. Partners highly rated its commitment and ease of doing business, as well as the quality of account management.

Juniper Networks scaled its enterprise business through its channel ecosystem over the last 12 months, by optimizing engagement and expanding its influence with top-tier partners. Continued investment in its differentiated cybersecurity portfolio and new digital tools boosted its partners' competitiveness.
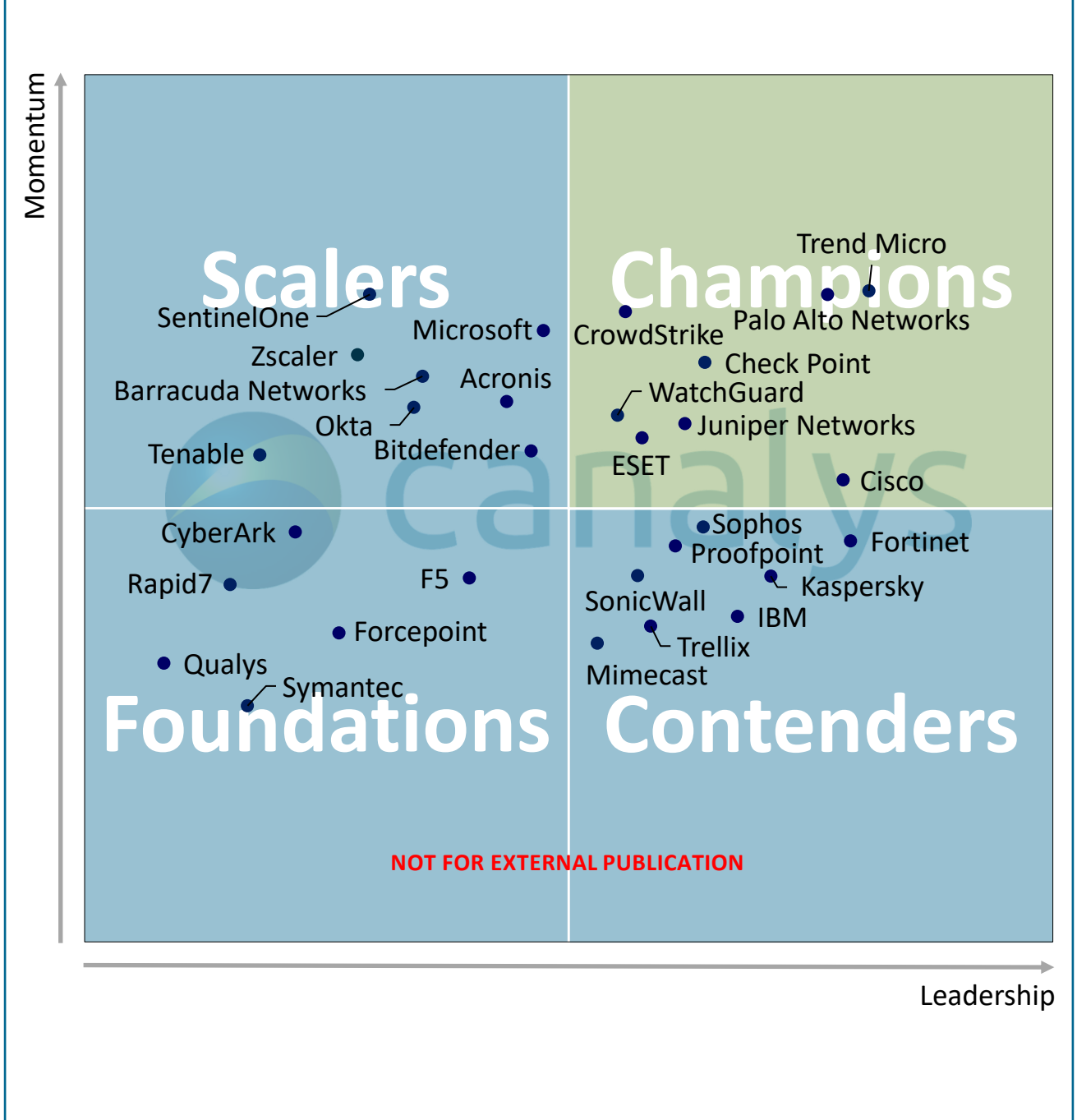
Palo Alto Networks capitalized on strong secular growth in cybersecurity to maintain momentum and reaffirmed its position as a leading vendor for partners. Further enhancements to partner profitability and predictability, combined with support for diverse business models, will help cultivate momentum.

Trend Micro extended its channel leadership with continued investment in innovating partner engagement and enablement, which contributed to the ongoing adoption of its SaaS offerings. Its redesigned partner program strengthened its commitment to growing channel profitability and competencies.

WatchGuard's commitment to the channel was demonstrated by its continued investment in key product, program and enablement initiatives over the last 12 months, especially with MSPs in the SMB and mid-market segments. Partners rated highly the ease of doing business and the quality of its account management.

Canalys Global Cybersecurity Leadership Matrix 2023

Global Cybersecurity Leadership Matrix
2023

Momentum →

Scalers

SentinelOne
Zscaler
Barracuda Networks
Okta
Tenable

Microsoft
Acronis
Bitdefender

Champions

Trend Micro
CrowdStrike
Palo Alto Networks
Check Point
WatchGuard
Juniper Networks
ESET
Cisco

Foundations

CyberArk
Rapid7
F5
Forcepoint
Qualys
Symantec

Contenders

Sophos
Proofpoint
Fortinet
Kaspersky
SonicWall
IBM
Trellix
Mimecast

NOT FOR EXTERNAL PUBLICATION

Leadership →

Understanding assessment criteria for vendors

Categories assessed for scoring

The Canalys Cybersecurity Leadership Matrix report assesses which vendors are playing an integral role in driving the success of the cybersecurity partner ecosystem. It takes in three primary types of input:

- **Analyst assessment:** Scoring of channel vision and strategy, programs and execution, mergers and acquisitions, portfolio competitiveness and new launches, and recent and future channel initiatives. This is based on ongoing analyst briefings and analysis of vendor surveys (where applicable).

- **Ecosystem feedback:** Feedback from the partner community, including analyst-led interviews and channel ecosystem ratings for the latest 12-month period (where applicable). Partner feedback focuses on programs and enablement metrics, sales engagement metrics and partner experience metrics.

- **Performance metrics:** Assessment of vendor growth and market share within peer groups for the latest 12-month period compared with the previous 12-month period. This is based on data from Canalys' quarterly Cybersecurity Ecosystems market data tracking service.

Canalys analysts' assessment

Ecosystem feedback

Performance metrics

Each of these metrics feed into a proprietary Canalys Leadership Matrix model, which produces a series of scores. This includes an overall leadership score, representing the current standing, as well as a momentum score, representing the degree of change relative to the group of assessed vendors.

The Canalys Leadership Matrix provides a graphical representation of the assessment of vendor performance. Each vendor is positioned in one of four categories:

- **Champions:** Vendors with high ratings in the areas assessed, which have shown both continued improvement in management, strategy and execution, and a commitment to driving future improvements.

- **Contenders:** Vendors with high leadership ratings in the areas assessed but have been outpaced by other competitors or peers.

- **Scalers:** Vendors with lower ratings in the areas assessed, but which have seen improvements in momentum, including channel sentiment and performance.

- **Foundations:** Vendors with a foundation in the areas assessed, but which currently have lower sentiment and performance levels compared with their peers.

Vendors eligible for inclusion in the Cybersecurity Leadership Matrix must have at least US$200 million in annual cybersecurity revenue per annum, excluding professional services, and with at least 50% of this revenue going through the channel.
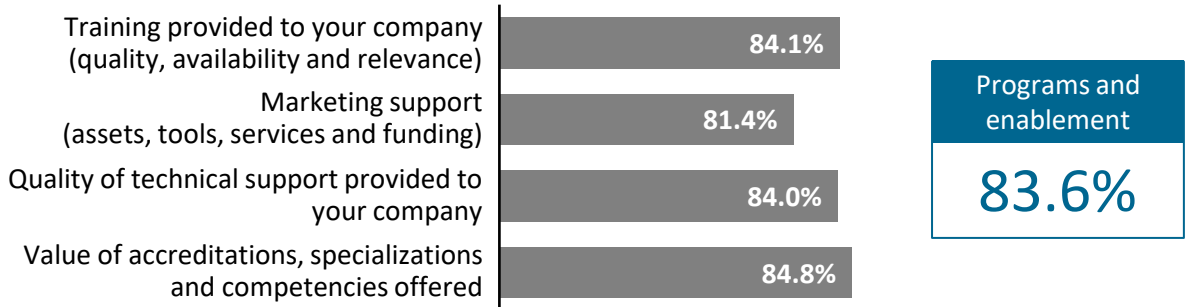
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Understanding the channel ecosystem feedback

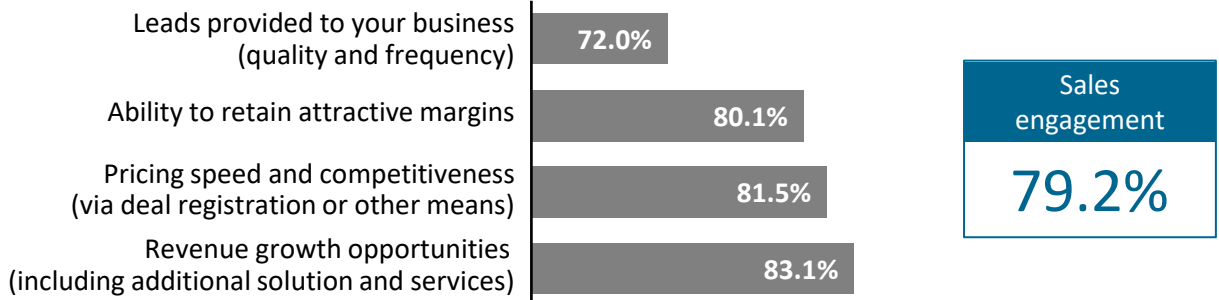## Candefero Vendor Benchmark for cybersecurity

The Candefero Vendor Benchmark is an online tool that assesses channel partners' views of technology vendors by asking them to rate vendors they sell across 12 areas of channel management on a score of 1 to 10. These 12 areas are collectively grouped into three topics: programs and enablement, sales engagement, and partner experience. Scores are collected on an ongoing basis from channel partners via the Canalys Candefero community, providing a continuous and real-time view of a vendor's ability to support its channel.

Candefero Vendor Benchmark: Worldwide aggregated channel feedback scores by metric for cybersecurity vendors only for November 2022 to December 2023
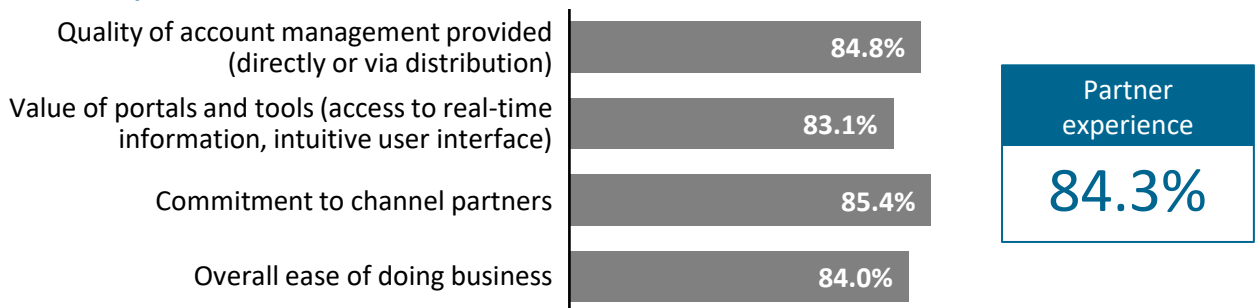
Programs and enablement metrics

Training provided to your company (quality, availability and relevance) — **84.1%**

Marketing support (assets, tools, services and funding) — **81.4%**

Quality of technical support provided to your company — **84.0%**

Value of accreditations, specializations and competencies offered — **84.8%**

Programs and enablement
83.6%

Sales engagement metrics

Leads provided to your business (quality and frequency) — **72.0%**

Ability to retain attractive margins — **80.1%**

Pricing speed and competitiveness (via deal registration or other means) — **81.5%**

Revenue growth opportunities (including additional solution and services) — **83.1%**

Sales engagement
79.2%

Partner experience metrics

Quality of account management provided (directly or via distribution) — **84.8%**

Value of portals and tools (access to real-time information, intuitive user interface) — **83.1%**

Commitment to channel partners — **85.4%**

Overall ease of doing business — **84.0%**

Partner experience
84.3%

Source: Candefero Vendor Benchmark, December 2023

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# Understanding the performance metrics

Cybersecurity Ecosystems quarterly data tracking

Vendor performance metrics were taken from the latest available quarterly revenue tracking data published in Canalys' Cybersecurity Ecosystems service. Specifically, vendor growth and market share were calculated for the latest 12-month period ending Q3 2023 and compared with the previous 12-month period. For the latest period under review, spending on cybersecurity technologies increased 12% to US$76.8 billion.

Worldwide cybersecurity market by quarter
Q4 2020 to Q3 2023

Last four quarters up to Q3 2023:
US$76.8 billion
Growth: +12.0%
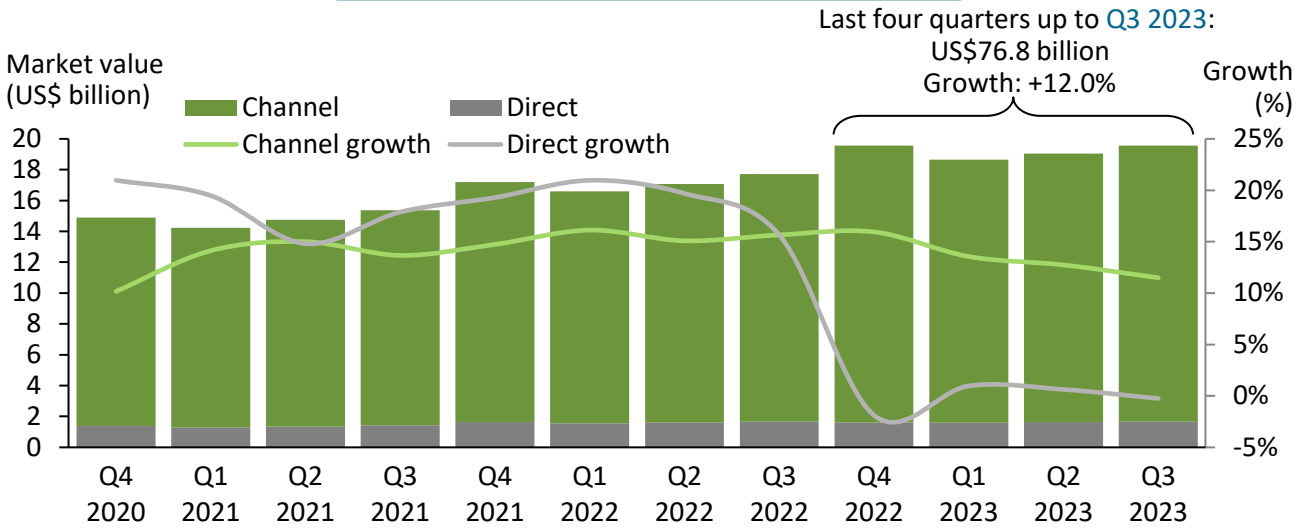
Worldwide cybersecurity shipments by selected leading vendors
Last four quarters ending Q3 2023
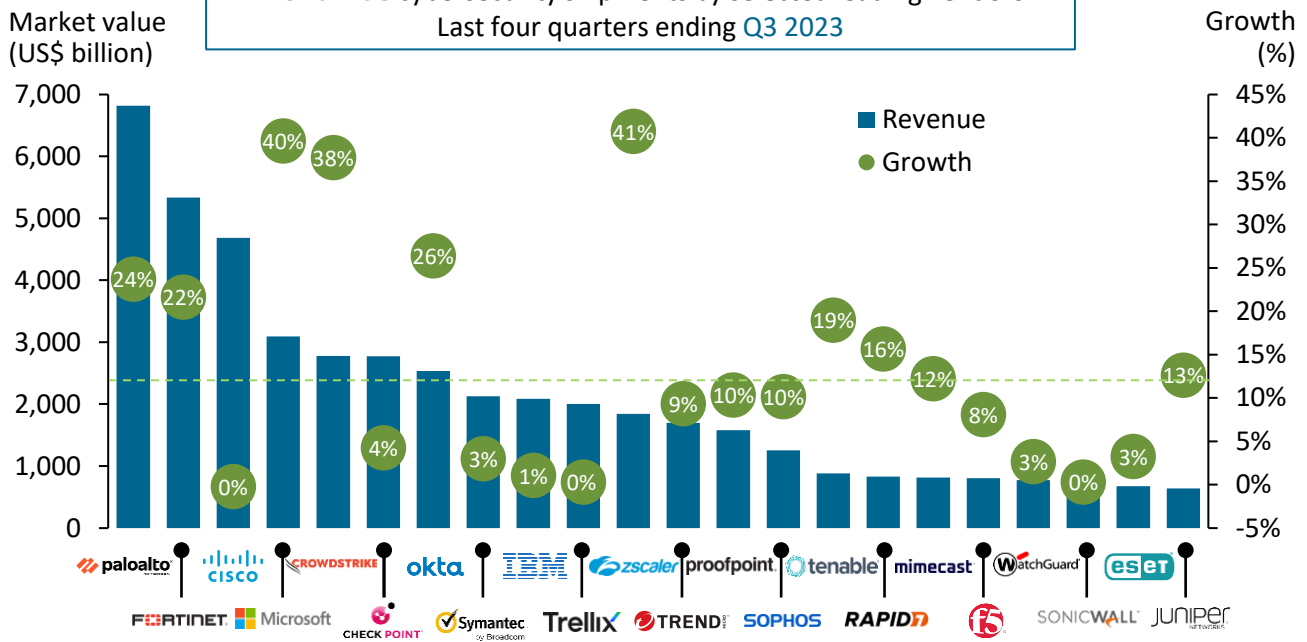
Source: Canalys Cybersecurity Ecosystems, December 2023

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Performance highlights: **Champions**

CHECK POINT™

> **Highlights and key strengths**
>
> - Quality of account management and technical support
> - Free base training, benefits for specializations
> - Partner enablement through marketplaces
> - Support and enablement of MSSP partner models

| Leadership score: | **64%** |
| Momentum score: | **67%** |

- **Check Point** optimized its ecosystem engagement and enablement processes over the last 12 months. The launch of its distributor stocking program decreased lead times for its Quantum SMB products to between one and two days. It enhanced its Engage App for partners by providing access to experts and learning curriculum, as well as deal registration. It also consolidated its program tiers, giving partners more differentiated benefits between each tier, free base training and discounts for specializations.

- Its MSSP program, which received positive feedback, continued to evolve with the introduction of new pay-as-you-go pricing that reduces new customer onboarding risks for partners. It plans to introduce Network-as-a-Service, XDR and MDR to this program in 2024. New discounts, rewards for incumbency and early support for Azure MPO, AWS DSOR and Google Marketplace Agency will simplify and improve the profitability of partners transacting via marketplaces over the next 12 months.

CISCO

> **Highlights and key strengths**
>
> - Value of accreditations and specializations
> - Quality of technical support
> - End-to-end network, cybersecurity and observability
> - Investment in transforming its cybersecurity business

| Leadership score: | **78%** |
| Momentum score: | **53%** |

- **Cisco** regained its champion status after making progress with the transformation of its cybersecurity business. Leadership and operational changes, simplification of engagement, platform expansion and investments have defined its last 12 months. The proposed US$28 billion purchase of Splunk underlines Cisco's intent, in addition to a series of smaller technology deals, including Valtix, Lightspin, Armorblox, Oort and Isovalent. Integration and execution will determine its performance over the next 12 months.

- It reinforced its partner-led strategy, while sentiment improved after supply-chain issues eased. Cisco enhanced all four partner tracks (Integrator, Provider, Developer and Advisor) in its Partner Program. It added new solution specializations and provided more opportunities for partners to earn in managed services, lifecycle activities and SMB sales, while aligning incentives to selling in the AWS Marketplace. It also announced key channel leadership changes and plans to move to a single incentive model.

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Performance highlights: **Champions**

CROWDSTRIKE

> ✅ **Highlights and key strengths**
>
> - Revenue growth opportunities for partners
> - Value of accreditations and specializations
> - Quality of account management and technical support
> - Diverse partner ecosystem approach

| Leadership score: | 56% |
| Momentum score: | 73% |

- **CrowdStrike's** new champion status reflected its growing importance for partners across the ecosystem and its increased reach through large regional and global partners, distributors and cloud marketplaces. Partner enablement through upselling and cross-selling on its expanding Falcon platform will be critical to grow business further and hit its next target of US$5 billion in annual recurring revenue. Over 60% of new customer wins in 2023 were partner-sourced, while engagement with GSIs increased.

- It introduced the Accelerate partner program in 2023. Key elements included CrowdClass training, which features technical and sales tracks, deal registration, CrowdCard for rewarding individual sellers, and a self-service marketing campaign platform to drive lead generation. It also launched Falcon Complete for Service Providers, which offers options for co-branded and white-labelled managed security services using Falcon Complete, its 24/7 monitoring, threat hunting and remediation offering.

ESET

> ✅ **Highlights and key strengths**
>
> - Commitment to partners and ease of doing business
> - Quality of account management and technical support
> - Ability to plan centrally and execute locally
> - Capitalizing on MSP ecosystem opportunities

| Leadership score: | 58% |
| Momentum score: | 58% |

- **ESET's** ability to centrally plan and coordinate its go-to-market strategies, combined with empowering partners and country offices to run campaigns and sales execution relevant to local strengths, are key contributors to its Champion status. It is one of a few full-spectrum cybersecurity vendors that covers consumer, SMB, enterprise and MSP segments, giving it access to extensive threat intelligence. The ESET Partner Program provides an engagement framework for its 10,000 MSPs and 24,000 resellers.

- MSPs remained a core part of ESET's strategy. Revenue through this channel grew 30%, boosted by a dedicated MSP sales enablement program. It strengthened its proposition by enabling MSPs to offer Inspect and Inspect Cloud XDR solutions and the ESET Professional and Security Services portfolio, including health checks and MDR. This is part of a broader expansion initiative, targeting the wider MSP community, including direct MSPs, MSPs via distributors and MSPs via marketplace integrations.

Performance highlights: **Champions**

JUNIPER NETWORKS®

Highlights and key strengths

- Commitment to channel partners
- Quality of account management
- Revenue growth opportunities for enterprise partners
- Expansion within top-tier partners

| Leadership score: | 62% |
| Momentum score: | 60% |

- **Juniper Networks** continued to grow its enterprise business through its channel ecosystem, by focusing on modernizing and optimizing partners' Juniper business. It increased the number of top-tier Elite Plus partners by 20%, highlighting its growing importance in enterprise accounts with service providers and systems integrators. It also invested in boosting partner competitiveness with new digital tools, including Velocity Pricing. This, combined with its PartnerLink tool, enables partners to close deals faster.

- Its Connected Security business expanded over the last 12 months and gained share, with growth in its core firewall business and expanding software portfolio. It increased its value proposition with the launch of the Security Distributed Services Architecture, which automates the enforcement of zero trust policies across hybrid environments, and AI-Predictive Threat Prevention. These further differentiate its strategy and build on previous key launches, including Security Director Cloud.

paloalto® NETWORKS

Highlights and key strengths

- Revenue growth opportunities for partners
- Leading channel cybersecurity vendor
- Quality of account management provided
- Support and enablement of multiple partner types

| Leadership score: | 77% |
| Momentum score: | 75% |

- **Palo Alto Networks** extended its leadership position in the cybersecurity ecosystem. Over the last 12 months it made significant changes to its NextWave program to enhance growth opportunities, profitability and differentiation for its 12,000 partners. It started by introducing a new framework to support five different partner models. These included Solution Provider (resell and integration), MSSP, Services Partner (consulting and referrals), CSP (selling via marketplaces) and Distributor.

- Enhancements have also focused on increasing partner profitability and predictability. It moved to a backend rebate compensation model to reward partners on a per-deal basis. Three types of rebates are available, including for specialized partners closing deal registered opportunities, for partners delivering specific eligible opportunities, and for distributors. It introduced Partner Perks sales rewards targeting a partner's sales representatives. The program will continue to evolve during 2024.

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Performance highlights: **Champions**

TREND MICRO™

Highlights and key strengths	**Leadership score:** 81%
• Commitment to channel partners • Quality of account management • Channel innovation and thought leadership • Support and enablement of multiple partner types	**Momentum score:** 75%

- **Trend Micro's** Vision One platform and channel-first approach continued to empower its partners to grow their businesses. It grew its AWS CCPO partners and MSPs with XDR by more than 40%. Over 800 partners used its co-branded Trend Cyber Risk Assessment, which generated more than 1,400 leads, while 77,000 partners undertook its training in the last 12 months. Its Champion status reflected its ongoing channel innovation and partners' contribution to driving customer adoption of its platform.

- Its redesigned Trend Partner Program, which focuses on enabling specific partner business models and accelerating their growth and competencies, will be rolled out in 2024. Lead generation, a new Partner Capability Model and Partner Digital Experiences are all key elements. Competencies cover Incident Response, Managed Security Services and Professional Services. Profitability is a major focus, which takes in partner capabilities, deal participation, influenced revenue in services and marketplace offers.

WatchGuard®

Highlights and key strengths	**Leadership score:** 55%
• Commitment to channel partners • Quality of account management • Ease of doing business • Optimized for SMB and midmarket opportunities	**Momentum score:** 61%

- **WatchGuard** delivered on key product, program and enablement initiatives to reaffirm its Champion status. It expanded its no-commitment subscription billings model with FlexPay to ease MSPs' cashflow concerns and boost the profitability of each customer under management. It extended its account-based marketing for partners' pipeline generation, enhanced its deal registration with higher margins, and invested in a new partner portal and social media advertising platforms to improve partner enablement.

- Its Unified Security Platform framework and WatchGuardONE program are designed to help partners reduce costs, increase operational maturity and win new business. Key initiatives in the next 12 months include expanding its partner base (having added 600 new leveled partners last year), driving platform-based cross-selling, especially with NDR (having acquired CyGlass) and XDR, introducing a new MSP designation, increasing MDR adoption, and boosting partner profitability with MDF enhancements.

Performance highlights: **Contenders**

Summary: Contenders

Contenders are important vendors for partners that are rated highly but have faced some challenges, either in market performance, channel sentiment, or with other internal and external factors. Their strategies indicate the potential to gain market share through the channel, but there are key challenges to overcome.

Contenders in the 2023 edition of the Cybersecurity Leadership Matrix include **Fortinet**, **IBM**, **Kaspersky**, **Mimecast**, **Proofpoint**, **SonicWall**, **Sophos** and **Trellix**.

Fortinet continued to drive growth through the channel in 2023, but still made cuts to its sales and channel teams that will disrupt partners, especially as it pivots its focus to capitalize on SecOps and SASE growth opportunities. It introduced updates to its Engage Partner Program, including new service designations, and expanded its usage-based FortiFlex licensing options to include private offers on AWS Marketplace.

IBM gained traction via its partner ecosystem with its Cloud Pak for Security, Guardium, QRadar, Randori and Verify offerings. Growing its partnerships with GSIs remains a strategic priority, with specific focus on building SOC modernization, data compliance and workforce identity practices. It is also investing in growing through marketplaces, recruiting new MSSPs and enabling its cloud-centric partners to sell cybersecurity.

Kaspersky expanded its network of Transparency Centers globally to 10, which facilitate the review of its code and processes. This is part of an initiative to build trust with partners and customers. It continued to drive growth in the enterprise segment by introducing new specializations with additional benefits, while also improving its deal registration program and expanding product availability in MSP subscriptions.

Mimecast unified its multiple partner initiatives under the Mimecast Partner ONE Program, which launched in September 2023. Existing partner engagements will transition to the new program in its FY2025. This will provide the foundation for its geographic expansion via partners in EMEA and Asia Pacific. Its channel ecosystem currently includes over 2,700 resellers, 700 MSPs and eight distributors.

Proofpoint introduced its Element Partner Program in 2023. Its entry-level Core tier provides partners with deal registration, sales certifications and technical training. Elite tier partners must meet revenue thresholds and invest in sales and technical training to gain access to deal registration discounts and dedicated account managers. It also introduced specializations including CASB and security awareness training.

SonicWall strengthened its executive leadership team with the appointment of a new channel leader and refreshed its partner engagement. The updated SecureFirst Partner Program focuses on enabling and accelerating the growth of its MSPs and MSSPs via tiered tracks, new procurement options, improved support with direct access to level 2 or tier 3 agents, and incentives on new account wins and training.

Sophos cut 10% of its workforce at the start of the year and onboarded a new channel leader, as it progressed with transitioning to MDR services. It extended MDR support to Microsoft Defender customers and launched incident response retainer services. By the end of the year, it had more than 19,500 Sophos MDR customers. Partner-led growth, partner enablement and lead generation are key priorities in 2024.

Trellix reached key milestones in its ecosystem development following the McAfee-FireEye merger. It launched the Xtend Partner Program and formed a Global Routes to Market team, with a focus on profitable growth for partners, particularly those building services on top of its XDR platform. Optimizing marketplace engagements is a key priority in 2024. But partners need greater stability following layoffs.

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Performance highlights: **Scalers**

Summary: Scalers

Scalers have made investments in the channel to improve partner perception. These vendors are growing and making market share gains. The combination of investments, mergers and acquisitions, product launches and channel initiatives place these vendors in a strong position to maintain momentum.

Scalers in the 2023 edition of the Cybersecurity Leadership Matrix include **Acronis**, **Barracuda Networks**, **Bitdefender**, **Microsoft**, **Okta**, **SentinelOne**, **Tenable** and **Zscaler**.

Acronis maintained its momentum in the cybersecurity partner ecosystem, especially among service providers, with the launch of its EDR offering and enhanced Sales Development Funds program. It plans to launch XDR and MDR in 2024. Distributor marketplace integrations, ISV ecosystem development and driving further upselling across its Cyber Protect Cloud platform are also key initiatives this year.

Barracuda Networks switched to an investment and growth-led strategy following its US$3.8 billion acquisition by private equity firm KKR in 2022. It strengthened its channel leadership and scaled its broader partner team at global and regional levels earlier in 2023. This was followed by the launch of its new Partner Success Program, which recognizes both partner resell and MSP revenue contribution.

Bitdefender improved the back-end processes of its Partner Advantage Network program to accelerate registration and onboarding processes for new partners. Partner enablement, via its live training Masterclass Program, and improving the ease of business, via a new price simulator tool, have been key focus areas. Bitdefender acquired services firm, Horangi, to scale its MDR and pen testing capabilities.

Microsoft rolled out its new Cloud Partner Program, which shifts emphasis to cloud adoption and expansion, and measures partners on net new customers, usage growth and deployment success. This change has caused frustration with its partners. It continued to grow its cybersecurity business, with its disruptive approach via its licensing that resulted in customers reducing their vendor relationships.

Okta adopted a partner-first strategy across its organization with the aim of improving ease of doing business via the channel and growing operations. It launched its new Elevate partner program to achieve these aims. This incorporated a simplified deal registration process, new partner tiers, including Elevate, Amplify, Ascend and Apex, as well as digital badges to distinguish expertise, such as MSPs.

SentinelOne gained market share through its expanding partner ecosystem. But the vendor lacks a consistent engagement structure, with no single channel leader, but rather individual leads for resellers, MSSPs, incident response partners and technology alliances. It established a distributor model in North America to replicate its success in other regions. It also introduced new Cloud and Identity specializations.

Tenable continued to grow its business through the channel. Its Assure Partner Program provides an engagement framework for its resellers, MSSPs and distributors. It has established relationships with key cybersecurity distributors in each region, including Networld and Westcon in Asia Pacific, Arrow and Exclusive Networks in EMEA, and Carasoft and Ingram Micro in North America.

Zscaler recruited a new channel leader to develop a more partner-focused strategy to drive the next phase of its planned growth to reach US$5 billion in annual recurring revenue (up from US$1.5 billion). It intends to retrain its sales team to align more closely with its partners, as well as increase sales and technical support, marketing and customer success capacity within its channel organization.

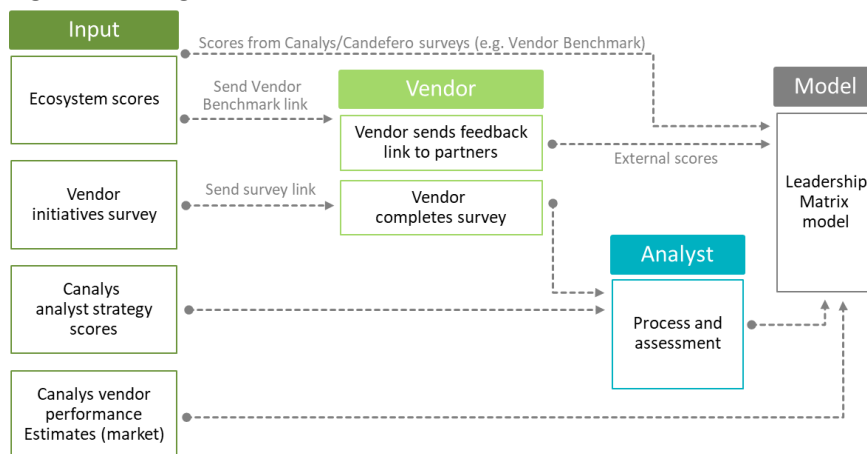# About the Canalys Leadership Matrix series

The Leadership Matrix assesses which vendors are playing an integral role in driving the success of the partner ecosystem. Through different series and versions, the Leadership Matrix explores geographic expansion, technology excellence, innovation and inspiration.

Methodology

The Leadership Matrix takes in three primary types of input:

- **Analyst assessment:** Our analysts will score a vendor's vision and strategy, programs and execution, portfolio competitiveness and new launches, M&A activities, and recent and future ecosystem initiatives. Analysts conduct assessments based on ongoing analyst briefings and analysis of vendor surveys (where applicable).

- **Ecosystem feedback:** Feedback from the partner community, including analyst-led interviews, Candefero Vendor Benchmark ratings for the latest 12 months (where applicable) and other surveys. Partner feedback focuses on programs and enablement metrics, sales engagement metrics and partners' experience, among other criteria depending on the Matrix.

- **Market performance metrics:** Assessment of vendor growth and market share within peer groups for the latest 12-month period compared with the previous 12-month period, using data from Canalys' quarterly shipment tracking services, vendor-provided data and publicly available information.

Each of these feed into a proprietary Canalys Leadership Matrix model, which produces a series of scores. This includes an overall leadership score, representing the current standing, as well as a momentum score, representing the degree of change.