

Canalys Global Cybersecurity Leadership Matrix 2025

More than 90% of the projected US\$281 billion cybersecurity spending in 2025, covering both technology and services, will involve partners. This underscores the importance of vendors working effectively with their partners. But customers’ requirements of cybersecurity partners are increasing, in line with escalating threat levels, ongoing resource constraints and the need for comprehensive, proactive and AI-driven predictive security measures.

This means vendors must engage and enable partners consistently and at scale, while adapting to diverse business models. Additionally, vendors must innovate in areas such as AI to automate not only threat detection and response but also processes for partners to operate profitably.

Cybersecurity platforms, combined with increased channel specialization, are expanding the partner ecosystem.

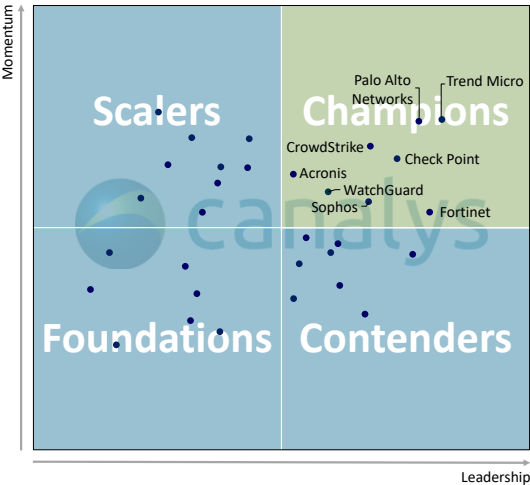
Numbers are growing from hundreds of thousands of primarily transactional partners to millions of services-led partners, including those from adjacent sectors, such as FSI and other vendors. This shift means vendors need to recognize partners at point of value rather than point of sale, rewarding them at different stages of the customer journey, from influencing decisions to expanding accounts through cross- and up-selling motions.

Routes to market are evolving quickly, driven by the shift to cloud-based software subscriptions and the growing influence of digital-first millennial buyers. This is accelerating cloud marketplace growth and transforming procurement processes, particularly in cybersecurity. Successful vendors will simplify marketplace transactions for partners and use data to reach the right buyers. The way partner opportunities are measured is also evolving with the adoption of platforms, shifting from margins to multipliers. Vendors must demonstrate the full financial potential of their platforms for partners, spanning advisory, design, implementation and managed services.

Consequently, cybersecurity vendors must engage not only transactional partners for licenses and subscriptions, but also service-led partners, such as MSPs, MSSPs and GSIs, vendors and ISVs through an integration-first approach, and customers. Those that create the strongest pull around their platform, attracting a diverse range of partners and generating significant multipliers, will be better placed to become a leading cybersecurity platform vendor in a highly competitive and fragmented market over the next decade.

Eight vendors achieved **Champion** status in the 2025 **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 advancing the cybersecurity ecosystem. Vision, leadership, competitiveness, partner initiatives and enablement within the ecosystem of each vendor was assessed and compared with their industry peers by a senior panel of Canalys analysts, and drawing on partner feedback, to determine channel leadership and momentum over the last 12 months. The eight are: **Acronis, Check Point, CrowdStrike, Fortinet, Palo Alto Networks, Sophos, Trend Micro and WatchGuard.**

Global Cybersecurity Leadership Matrix
2025



Global Cybersecurity Leadership Matrix: Champions 2025

















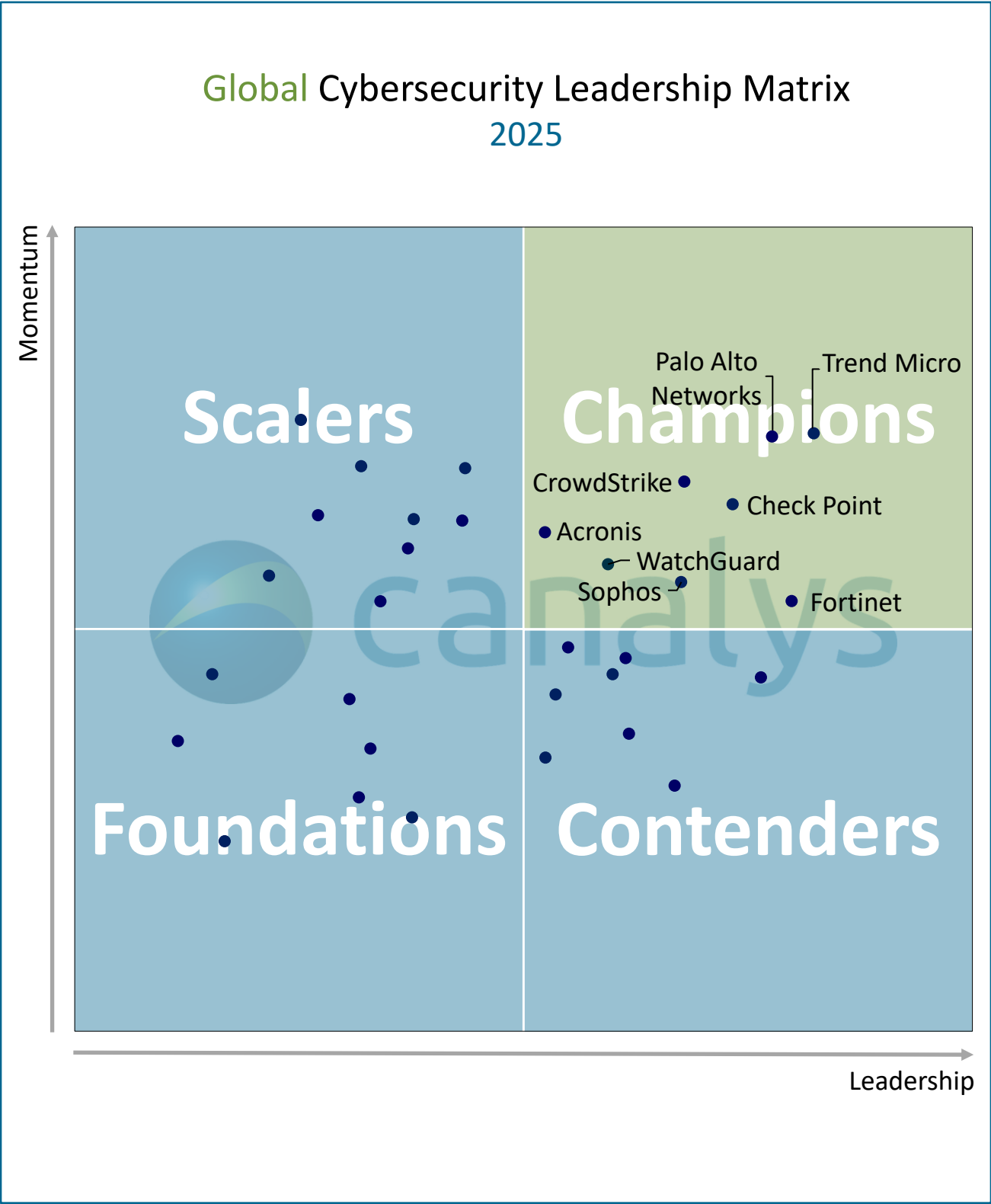
Performance highlights: **Champions**

Check Point, CrowdStrike, Palo Alto Networks, Trend Micro and **WatchGuard** reaffirmed their positions as Champions and are joined by **Acronis** for the first time and the return of **Fortinet** and **Sophos** in the 2025 edition of the Cybersecurity Leadership Matrix. Key investment priorities across these vendors and others during the review period included:

- Globalizing programs and restructuring the frameworks around multiple partner model types.
- Measuring value, adopting points-based programs and rewarding partners from pre-sales to post-sales.
- Shifting from margins to multipliers and quantifying the partner opportunity with platforms.
- Enabling partners to transact predictably and profitably across cloud marketplaces.
- Extending partner ecosystems to third-party vendors and non-traditional cybersecurity channels.
- Advancing partners' cybersecurity skills and capabilities through specializations and accreditations.
- 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.
- Enhancing the partner program experience from registration to progression to higher program tiers.
- Automating processes with AI and boosting partner profitability through targeted rebates and incentives.
- Adopting customer-centric metrics and rewards to drive specific outcomes.
- Improving partner portals, including sales processes, such as quoting, renewals and business visibility.
- Increasing cross-sell and upsell opportunities through improved analytics and partner collaboration.
- Scaling the creation and dissemination of digital content for lead generation.

Acronis established itself as a key vendor for MSP technology stacks by natively integrating cybersecurity, data protection, Microsoft 365 protection and MSP operations. Its MSP-first approach, vendor-neutral and role-specific technical training, and ongoing cybersecurity platform updates were highly rated by partners.

Canalys Global Cybersecurity Leadership Matrix 2025



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 partner vision and leadership, execution of partner strategy, 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.

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:

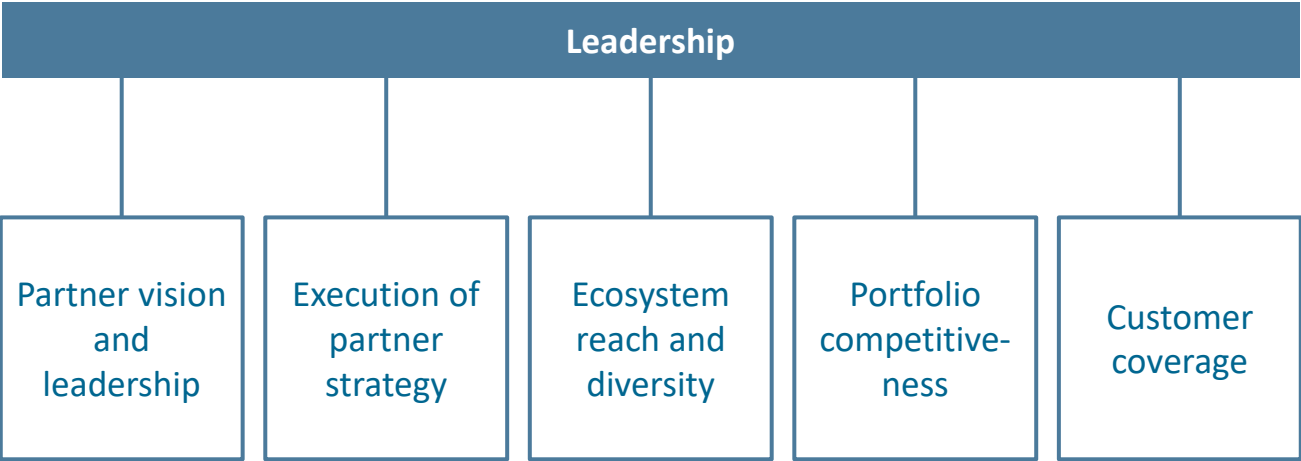
- **Champions:** Vendors with high ratings in the areas assessed, which have shown both continued improvement in management, strategy and execution, and a commitment to driving future improvements.
- **Contenders:** Vendors with high leadership ratings in the areas assessed but have been outpaced by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

The Leadership Matrix considered 32 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.

Understanding analyst assessment

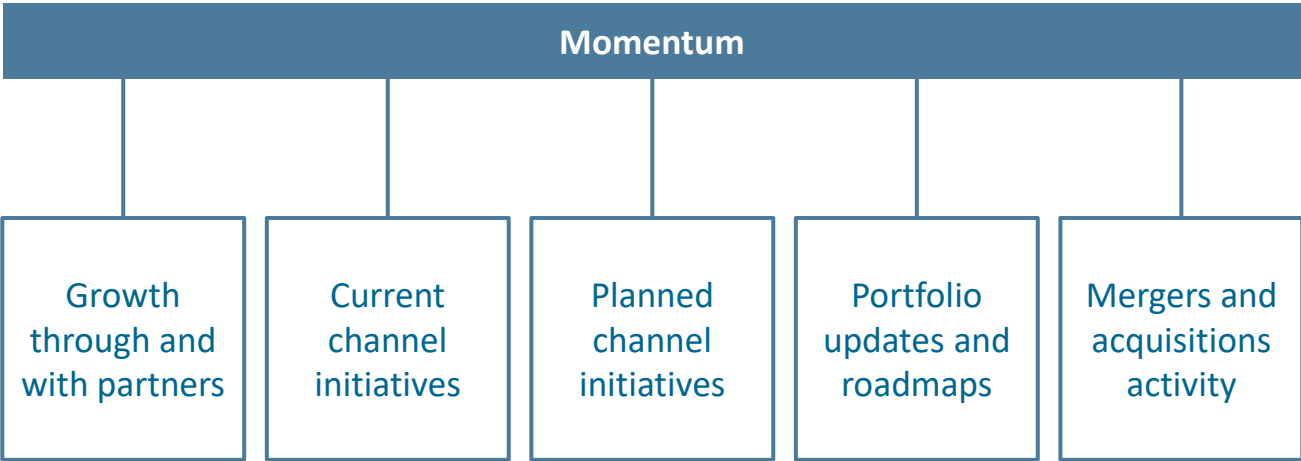
Leadership assessment

A senior panel of Canalys analysts assessed and ranked each vendor in the following five categories to determine the leadership scores within the cybersecurity ecosystem:



Momentum assessment

The same panel assessed and ranked each vendor in the following five categories to determine the momentum within the cybersecurity ecosystem:



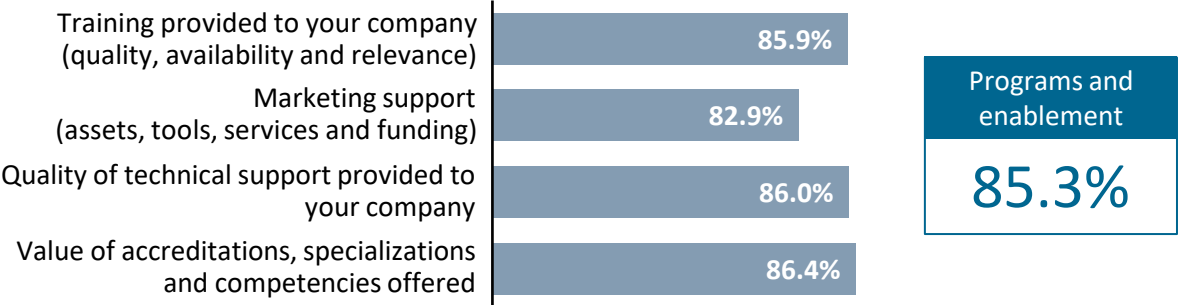
Understanding the channel ecosystem feedback

Candefero Vendor Benchmark for cybersecurity

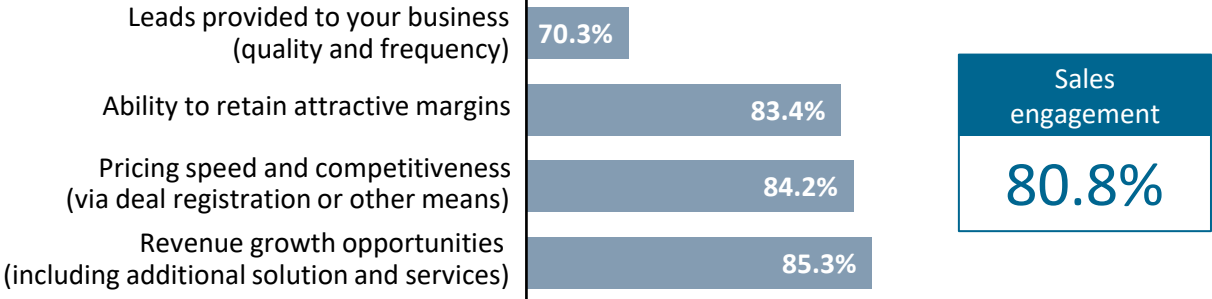
The Candefero Vendor Benchmark is an online tool that assesses channel partners’ views of technology vendors by asking them to rate vendors they sell across 12 areas of channel management on a score of 1 to 10. These 12 areas are collectively grouped into three topics: programs and enablement, sales 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 **March 2024 to February 2025**

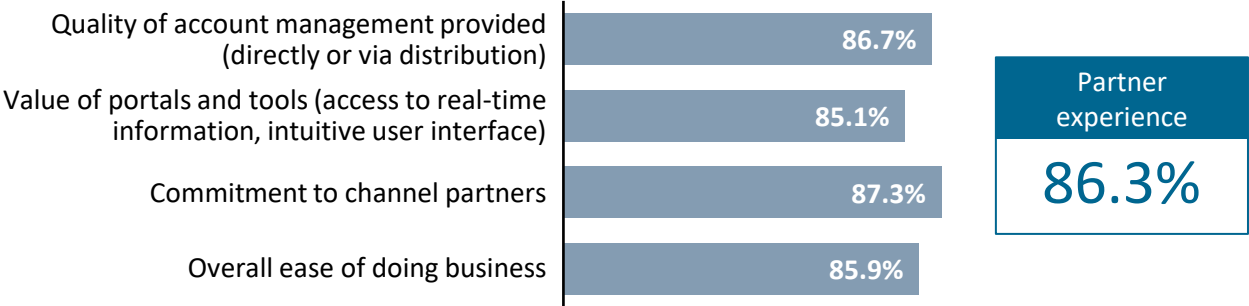
Programs and enablement metrics



Sales engagement metrics



Partner experience metrics

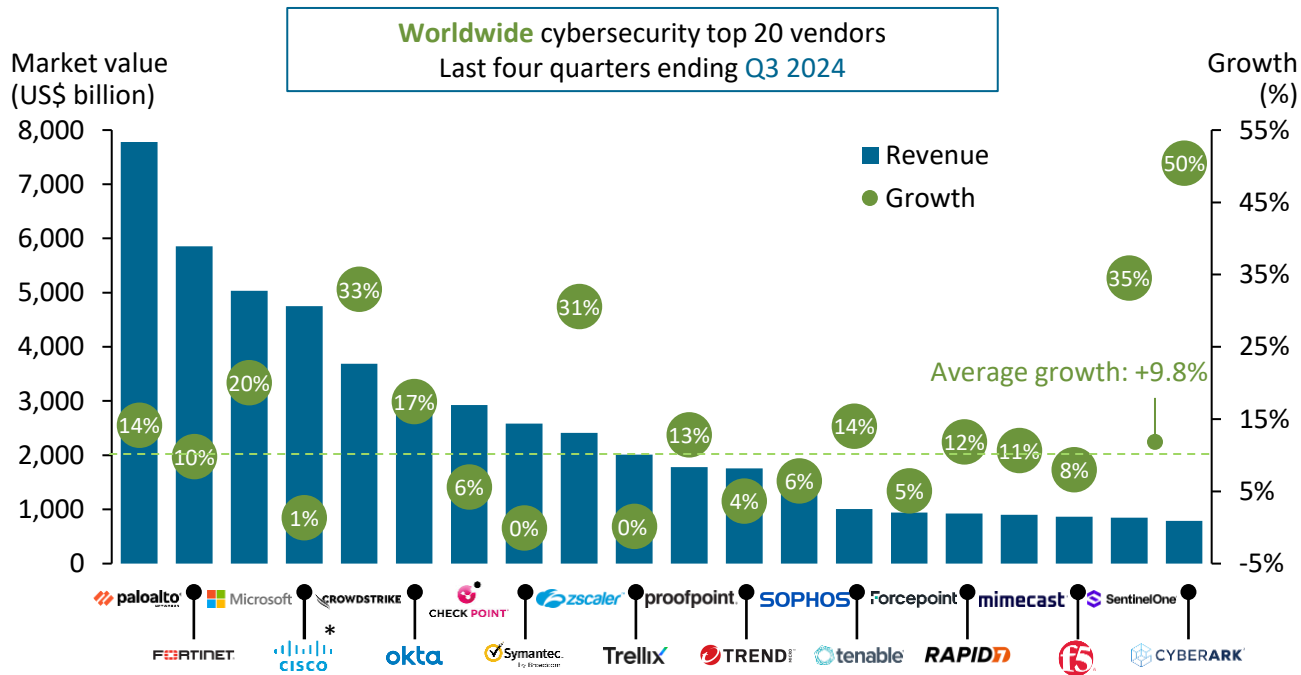
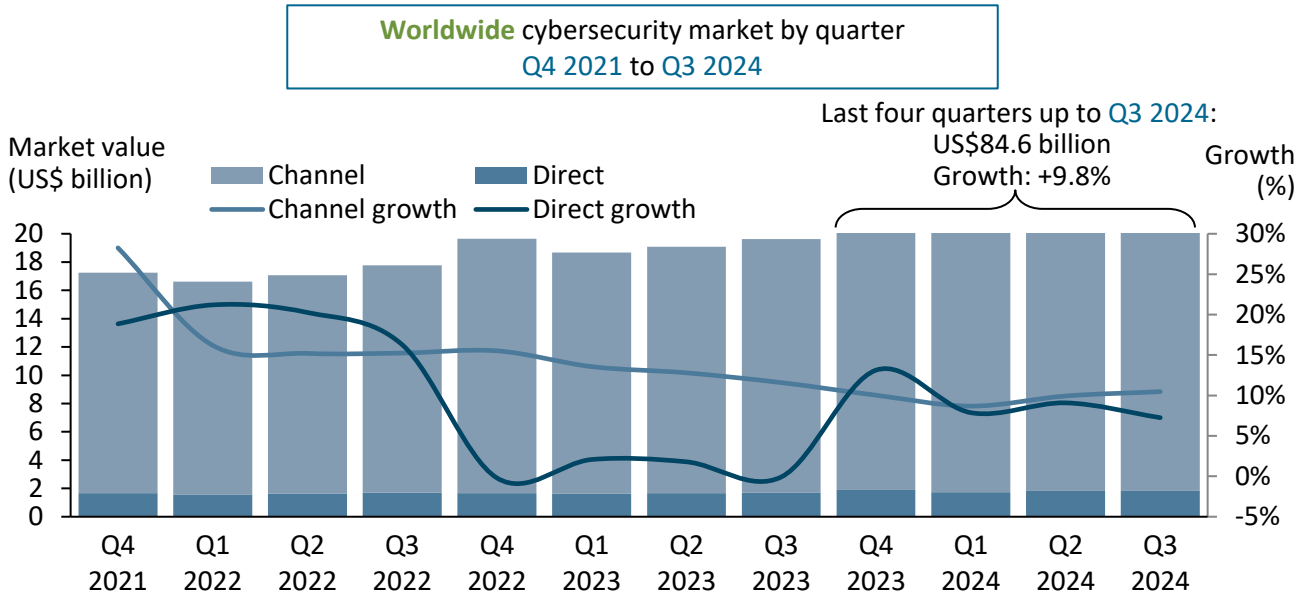


Source: Candefero Vendor Benchmark, February 2025

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 2024 and compared with the previous 12-month period. For the latest period under review, spending on cybersecurity technologies increased 9.8% to US\$84.6 billion. Over 90% of this spending was through and with partners.



Source: Canalys Cybersecurity Ecosystems, December 2024

Performance highlights: **Champions**

Acronis

**Highlights and key strengths**

- MSP-first approach and overall ease of doing business
- Valued portals and tools for MSP partners
- Portfolio spanning the NIST framework
- Vendor-neutral and role-specific technical training

Leadership score: 52%

Momentum score: 62%

- **Acronis'** natively integrated cybersecurity platform, covering data protection and operational management, enables MSPs to deliver services across the NIST framework. In 2024, its #CyberFit partner program boosted partner profitability with new rebates, revamped distributor programs and improved training. This led to a 90% increase in ARR from cross-selling by its top-tier partners. It also released Acronis XDR, MDR and Copilot (early access) to expand its cybersecurity portfolio.
- Its MSP-first approach will be strengthened in 2025 with the launch of the MSP Pro Program for its top partners, an automated onboarding and nurturing process for partners, consumption monitoring tools, co-branded marketing campaigns and a partner coaching program. In addition, a new MSSP MDR program will provide co-managed and Acronis-powered MDR offerings, while the launch of XDR for Networks and Microsoft 365, plus Microsoft Defender integration, will expand it reach with MSPs.

About the Canalys Leadership Matrix series

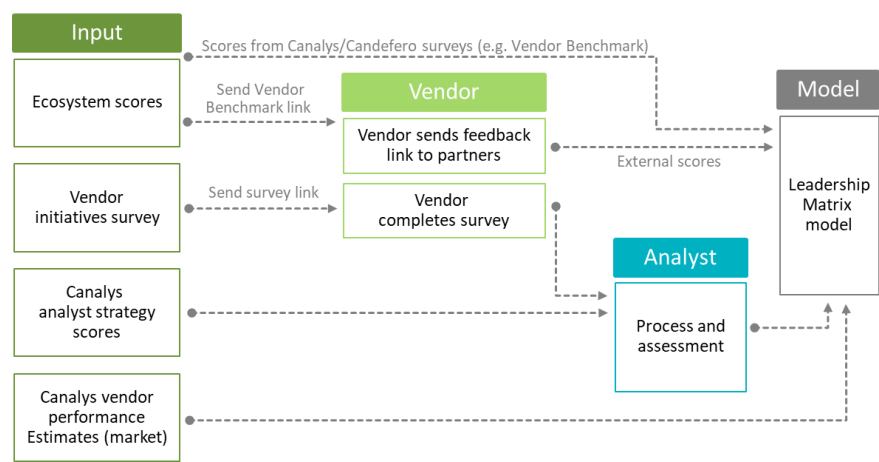
The Leadership Matrix assesses which vendors are playing an integral role in driving the success of the partner ecosystem.

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.
- **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.



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