

Winning in the Modern Channel



Assessments, benchmarks and competitive insights to help channel stakeholders strengthen their position and profitability

Executive summary

In 2026, global IT spending is set to exceed US\$5.5 trillion, with around 70% delivered or influenced by partners. Yet many vendors still lack the visibility and data needed to manage their Partner ecosystems effectively.

The dynamics of partner ecosystems are undergoing a profound shift. Cloud marketplaces and co-sell motions have evolved from niche experiments into mainstream sales engines, reshaping how technology vendors and partners go to market.

At the same time, recurring subscription and OPEX-based models now dominate infrastructure and SaaS spend, driving demand for scalable, consumption-based solutions. AI and automation are redefining partner enablement and customer engagement, unlocking new efficiencies and insights across the value chain.

Against this backdrop, rising regulatory complexity - from GDPR and NIS2 to the EU AI Act and evolving US data laws - is turning compliance into a competitive differentiator.

In this new landscape, successful partner strategies must be agile, data-driven, and built for trust.

The message is clear: the vendors who thrive will be those who move from intuition to data-led execution.

This paper explores how vendors across the Globe can unlock growth by applying assessments, benchmarking, and competitive intelligence to their partner strategies.

Table of Contents

1. Introduction
2. Changing Face of Channel Ecosystems
3. Vendor Challenges
4. A Data-Led Partner Ecosystem Strategy
5. What Success Looks Like
6. Conclusion
7. References

Introduction

The technology ecosystem is entering its most transformative phase in decades. Partners of all types - resellers, distributors, MSPs, ISVs, and Integrators - are central to how solutions are bought, integrated, and consumed.

Yet the majority of vendors still manage ecosystems through legacy tiering models, static certifications, or incomplete reporting.

The outcome: **wasted MDF, under-performing partnerships, and missed growth opportunities.**

In 2026, vendors who master evidence-based ecosystem management will outperform peers on revenue growth, customer retention, and partner loyalty.

The changing face of Partner ecosystems

The partner ecosystem has moved beyond its traditional function as a distribution channel. Moving forward, it's a dynamic growth engine shaped by cloud marketplaces, co-sell motions, SaaS dependency, AI, and regulatory-driven specialisation.

Vendors that understand and adapt to these shifts will be positioned to capture the majority of growth.

IT Spending and Ecosystem Growth

Global IT spending is set to exceed US\$5.5 trillion, with approximately 70% delivered or influenced by partners (Canalys, 2024).

In the US, growth is driven by heavy investment in AI, cloud, and cybersecurity, with security software alone projected at US\$121 billion by 2026 (Gartner).

In EMEA, spend is forecast to rise by 8–9% year-on-year, fuelled by digital sovereignty initiatives, AI adoption, and regulatory-driven investment (Clover Infotech, 2025).

Four in five enterprises will design and run new digital infrastructures using subscription-based services

Subscription and OPEX Models

Traditional resellers transacting one-off product resale is being outpaced and is coming towards the end of its lifecycle.

Most new digital infrastructure will be consumption-based. Partners now rely on recurring revenue streams, built on customer success, retention, and lifecycle management.

Successful channel partners realise their value comes from their knowledge, expertise and the relationships they hold with their customers.

As such, vendors need to be far more strategic in their choice of partners and forensic about how they judge their value.

This transition places services and outcomes, rather than transactions, at the core of partner economics.

Marketplaces: The New Channel

Cloud marketplaces have become mainstream procurement hubs.

Enterprise **software sales through AWS, Azure, and Google Cloud marketplaces** are expected to reach US\$85 billion by 2028, a fivefold increase from 2023 (Canalys, 2024).

Crucially, more than half of these transactions will be partner-led, reinforcing that marketplaces are not replacing partners, but reshaping their role in acquisition, fulfilment, and solution integration.

Co-Sell: A Structural Advantage

Co-selling has proven to be one of the most transformative forces in the ecosystem.



Vendors aligned with hyperscalers and partners on joint selling motions achieve:

65% higher win rates
54% larger average deal sizes
51% revenue growth

Source: Canalys & AWS

This is not simply an incremental lift. Co-sell partners are often prioritised in hyperscaler algorithms, unlocking marketplace incentives and pipeline opportunities unavailable to solo sellers.

For vendors, co-sell is now a structural advantage, not a tactical one.

SaaS Ecosystems: Partner Dependence Rising

The SaaS economy continues its steep ascent, with global revenues surpassing US\$420 billion in 2025 and projected to climb even higher into 2026 (Gartner, 2024).

This growth is no longer driven solely by direct sales or product innovation, but increasingly powered by the strength and reach of partner ecosystems. Leading SaaS providers now attribute the majority of their commercial success to partner-led motions.

Microsoft reports that nearly 95% of its commercial business flows through partners, **Salesforce** attributes around 70% of its revenue to partner-assisted deals, and **Autodesk** sees approximately 65% of new business originating from partner-led engagements.

These figures underscore a fundamental shift: SaaS growth is inseparable from partner execution. Vendors are no longer just selling software; they are building platforms for partners to deliver value, drive adoption, and expand customer lifetime value.

As the SaaS model matures, partner dependence is not a vulnerability; it is a strategic advantage.

Services and Outcomes, not Transactions

Traditional resellers transacting one-off product resale are being outpaced and are coming towards the end of their lifecycle. as most new digital infrastructure will be consumption-based.

Partners now rely on recurring revenue streams, built on customer success, retention, and lifecycle management.

The most successful channel partners realise their value comes from their knowledge, expertise and the relationships they hold with their customers.

As such, vendors need to be far more strategic in their choice of partners and forensic about how they judge their value.

This is not simply an incremental lift. Co-sell partners are often prioritised in hyperscaler algorithms, unlocking marketplace incentives and pipeline opportunities unavailable to solo sellers.

The choice of partners and being forensic about value is how vendors should now judge their sales channel.

AI as a Force Multiplier

Artificial intelligence is no longer a future-facing experiment within partner ecosystems; it is a present-day force multiplier.



As we move through 2026, AI is increasingly becoming embedded across partner operations, transforming how vendors and partners collaborate, sell, and support customers.

AI-driven automation is streamlining onboarding and enablement, reducing time-to-productivity for new partners. Predictive analytics are powering co-sell recommendations, helping partners identify the right opportunities at the right time.

Intelligent diagnostics and observability tools are enhancing customer support, enabling faster resolution and deeper insights.

Partners that invest in AI capabilities are seeing tangible returns: greater trust from vendors

This means higher margins through operational efficiency and stronger customer loyalty through differentiated service delivery.

For vendors, enabling AI within the partner base is no longer optional; it's mission-critical to scale, compete, and win in this changed marketplace.

Specialisation and Compliance as Differentiators

Regulated industries such as finance, public sector, and healthcare, compliance is no longer a checkbox; it is a growth enabler.

Partners with proven readiness for GDPR, NIS2, the EU AI Act, and evolving US data privacy laws are indispensable.

Equally, vertical specialisation, knowledge of customer environments, workflows, and regulations, sets high-performing partners apart from generalists.

Tipping point: partners are no longer an extension of vendor sales; they are the front line of growth, compliance, and customer success.

Vendor challenges

As partner ecosystems become more central to SaaS growth, vendors face new operational and strategic challenges that can hurt scale, efficiency, and competitive edge.

Partner performance blind spots are increasingly common, with fragmented data spread across Partner Relationship Management (PRM) systems, Customer Relationship Management (CRM) platforms, and distributor portals.

This lack of unified visibility makes it difficult for vendors to identify which partners are truly driving ROI, and which are simply consuming resources.

- **Channel conflict and competitive overlaps** further complicate the landscape. Many partners work with multiple vendors, and without real-time intelligence, vendors risk losing share-of-wallet to

competitors whose solutions are better positioned, incentivised, or supported.

Boards and finance leaders are demanding clearer attribution and measurable pipeline impact, forcing vendors to rethink how MDF is allocated and tracked.

- **Marketing Development Funds (MDF)**, a cornerstone of partner engagement, are under scrutiny. According to Forrester, between **20% and 60% of MDF** goes unclaimed or delivers weak ROI.
- **Capability gaps are also widening.** As AI, compliance, and vertical-specific expertise become essential to customer success, vendors struggle to scale these competencies across diverse partner bases without targeted enablement programs.
- **The regulatory burden continues to grow.** From GDPR and NIS2 to the EU AI Act and evolving US data laws, compliance is no longer just a legal concern; it's a board-level priority.

This is not simply an incremental lift. Co-sell partners are often prioritised in hyperscaler algorithms, unlocking marketplace incentives and pipeline opportunities that are unavailable to solo sellers.

Building Resilience into Partner Programs

To thrive, vendors must radically re-imagine their partner programs not just as sales channels, but as strategic ecosystems built for resilience, agility, and shared success.

This means moving beyond transactional engagement toward data-driven collaboration, intelligent enablement, and compliance-aware governance.

First, Vendors must invest in unified partner intelligence, consolidating data across PRMs, CRMs, and distributor platforms to gain a holistic view of partner performance, pipeline contribution, and customer impact.

This visibility enables smarter resource allocation, targeted incentives, and early identification of high-potential partners.

Second, AI-powered enablement must become standard. From onboarding workflows to predictive co-sell recommendations, automation can dramatically reduce friction and accelerate partner productivity. Vendors should prioritise tools that help partners self-serve, learn, and act with confidence.

Third, resilience requires conflict-aware channel design. Vendors must proactively manage competitive overlaps by offering differentiated value propositions, vertical-specific solutions, and transparent rules of engagement. This helps protect share-of-wallet and fosters trust across multi-vendor partner networks.

Fourth, vendors must rethink MDF strategy by shifting from broad allocation to performance-based funding tied to measurable outcomes. This includes real-time tracking of campaign impact, pipeline attribution, and ROI dashboards that satisfy both marketing and finance stakeholders.

Finally, compliance enablement must be embedded into partner programs. Vendors should provide tools, training, and frameworks that help partners navigate GDPR, NIS2, the EU AI Act, and other emerging regulations. This not only reduces risk but positions compliance as a competitive advantage.

A Data-Led Ecosystem Strategy

Traditional partner management methods, which tend to rely on static tiering, manual reporting, and anecdotal performance reviews, are no longer sufficient.

To unlock true ecosystem value, organisations must adopt a data-led strategy that enables precision, agility, and scale. This approach transforms partner ecosystems from reactive networks into predictive growth engines, driven by measurable outcomes and continuous optimisation.

Assess the Ecosystem

The foundation of a data-led strategy begins with a comprehensive assessment of the existing partner landscape.

A **Partner Performance Heatmap** enables organisations to score partners across critical dimensions such as certifications and specialisations, marketplace readiness, AI and automation maturity, and customer outcomes, including renewals, expansions, and Net Promoter Scores (NPS).

Additionally, **evaluating partners' compliance and governance readiness** ensures alignment with regulatory standards and risk management protocols. This multidimensional view replaces gut-feel assessments with actionable insights, allowing leaders to prioritise investment and engagement with precision.

Benchmark to Lead

To lead in a competitive ecosystem, benchmarking is essential. Organisations must measure their partner program performance against competitors, industry averages, and regional or vertical leaders.



Key metrics include Marketing Development Fund (MDF) return on investment, co-sell win rates, and partner activation velocity. Benchmarking not only highlights performance gaps but also uncovers opportunities to differentiate and accelerate growth.

For example, if the average MDF ROI in EMEA is 3x and your program delivers only 1.5x, this signals a board-level challenge requiring strategic intervention.

If the average ROI in EMEA is 3x and your programme delivers 1.5x, this signals a board-level challenge requiring strategic intervention.

Net-New & Under-Leveraged Partners

A data-led approach also enables the discovery of high-potential partners that may be overlooked by traditional recruitment models. These include partners who consistently win with competitor solutions, “rising stars” gaining traction on marketplaces, and those embedded in regulated industries where compliance and trust are paramount.

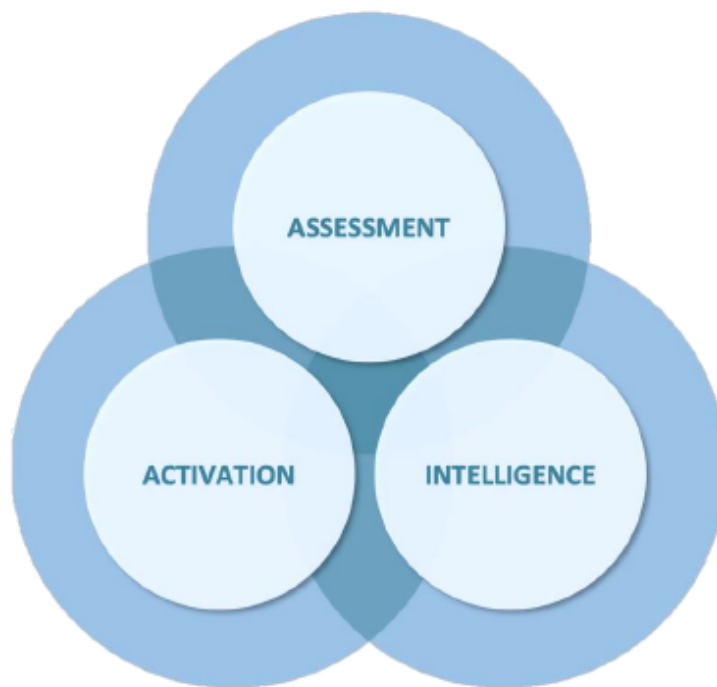
Additionally, dormant partners aligned with current customer demand can be reactivated through targeted campaigns. By leveraging ecosystem intelligence, organisations can expand their reach and diversify their partner portfolio with confidence. help partners self-serve, learn, and act with confidence.

Activate with Precision

Activation strategies must evolve beyond activity-based metrics and rigid tiering. Instead, MDF should be tied directly to pipeline KPIs, ensuring that investments drive measurable business outcomes.

Measure, Iterate, Govern

Finally, continuous measurement and governance are critical to sustaining a high-performing ecosystem. Dashboards should track partner performance by region and vertical, monitor for overlaps and channel conflict, and audit compliance maturity on an ongoing basis.



Partner satisfaction scores must be incorporated into decision-making to ensure long-term alignment and loyalty. This closed-loop system enables organisations to iterate quickly, respond to market shifts, and maintain ecosystem integrity at scale.

Traditional partner management methods, which tend to rely on static tiering, manual reporting, and anecdotal performance reviews, are no longer sufficient.

What Success Looks Like

Market-Leading Vendors

By 2026, the majority of leading vendors will be looking towards transforming their partner ecosystems into intelligent, outcome-driven growth platforms.

These ecosystems will be deep and specialised, not just broad, with partners chosen and activated based on proven capabilities and strategic fit.

They will be locally relevant, particularly in complex regions like the US and EMEA, where compliance, data sovereignty, and regulatory alignment are non-negotiable.

Their success will be defined by data-driven attribution across all sales approaches - direct, co-sell, and marketplace - so vendors can see exactly where value is created and how to scale it.

MDF and incentive programs will be outcome-focused, tied directly to metrics such as renewal rates, customer retention, and expansion velocity, rather than superficial activity counts.

Moreover, thriving ecosystems will be partner-friendly, evidenced by high satisfaction and loyalty scores. Vendors will foster trust through transparency, automation, and shared success metrics.

Those who have failed to evolve will continue to waste resources, underperform in key markets, and ultimately cede share to more data-savvy competitors who understand that precision beats tradition.

Emerging Vendors

For vendors new to market or those still building momentum, the path to ecosystem success in 2026 looks different but no less strategic.

These organisations may not yet have the scale or brand recognition of market leaders, but they have a unique opportunity to build data-led ecosystems from the ground up, avoiding the legacy inefficiencies that often plague more established players.



Emerging vendors should prioritise specialisation over scale, focusing on partners who deeply understand their target verticals or customer segments. Rather than casting a wide net, they should seek distribution and growth services that offer:

- Local relevance and compliance expertise, especially in regulated markets like EMEA.
- Marketplace acceleration, including listing support, transacting, and promoting solutions on hyperscaler platforms.
- Attribution clarity, with tools that track direct, co-sell, and marketplace sales to ensure every partner motion is measurable.
- Outcome-based investment models, where MDF and incentives are tied to real business impact—renewals, expansions, and customer satisfaction—not just activity volume.
- Partner enablement automation, including onboarding, training, and campaign execution, powered by AI and integrated tooling.

For these vendors, the right distribution partner isn't just a reseller, it's a growth enabler. They should look for providers who offer ecosystem intelligence, not just access, and who can help them identify rising stars, activate dormant demand, and scale with precision.

Those who don't embrace this mindset risk burning through resources, misaligning with market needs, and missing the window to establish a differentiated ecosystem presence.

Those who do will be able to leapfrog traditional models and compete effectively with larger incumbents.

Newly Funded Start-Ups

For newly funded start-ups, 2026 presents a pivotal moment to build partner ecosystems with agility and foresight.

Unlike legacy vendors burdened by outdated tiering models, start-ups have the advantage of starting fresh, with data-led principles embedded from day one.



When evaluating distribution or growth services, these companies should seek partners that offer more than reach: they should deliver ecosystem intelligence, automated enablement, and clear attribution across sales motions.

Start-ups must prioritise services that help them scale efficiently, such as marketplace onboarding, co-sell alignment with hyperscalers, and outcome-based MDF models.

The goal isn't just to grow fast, but to grow smart with a partner network that is specialised, compliant, and capable of driving measurable customer outcomes.

With the right ecosystem strategy, start-ups can punch above their weight and compete with incumbents on precision, not just presence.

Shake Up Your Distribution Strategy

As partner strategies evolve, so too must the criteria for choosing a distribution partner.



Many vendors default to traditional distributors based on legacy relationships or perceived reach, but these partners often lack the agility, data infrastructure, and outcome orientation needed in today's ecosystem-driven market.

Vendors should now be challenging the status quo and be seeking distribution partners that align with their ecosystem vision, not just their product catalogue. This means prioritising partners who offer real-time performance insights, marketplace enablement, co-sell alignment, and automated onboarding and claims processing.

Whether you're a newly funded start-up or an established vendor looking to modernise, shaking up your distribution strategy is essential.

The right distribution partner should act as a growth architect, not just a logistics provider, helping you scale with precision, drive measurable outcomes, and build lasting customer value.

Expectations on Partners

The time has passed when passive resellers and transactional relationships were mainstream. Partners who were delivered opportunities because of the relationships they already hold.

Today, vendors demand partners who bring strategic value, with a clear commitment to competency development, marketplace engagement, and customer success metrics such as renewals, expansions, and satisfaction scores.

Partners should demonstrate data transparency, sharing insights on pipeline progression, campaign performance, and co-sell outcomes.

Vendors should also expect partners to align with compliance standards, embrace automation in onboarding and claims, and actively participate in joint planning and innovation.

In return for enablement and the investment that comes with it, vendors must hold partners accountable to measurable outcomes, ensuring that every relationship contributes to ecosystem growth, not just coverage.

Conclusion

Channel ecosystems of the future are no longer passive distribution networks; they are intelligent growth engines.

Success in this new landscape depends on data-led precision, not legacy tiering or intuition. Vendors must rigorously assess their ecosystems, compare with leaders, find high-potential and under-leveraged partners, invest with clear outcomes, and run with compliance and trust at the core.

But this transformation isn't just for market leaders. Emerging vendors and newly funded start-ups have a unique opportunity to build smarter ecosystems from day one by choosing distribution partners that offer intelligence, automation, and measurable impact, not just reach.

Likewise, partners themselves must demand transparency, enablement, and outcome-based incentives, while vendors should expect strategic alignment, data sharing, and customer-centric performance in return.

The ecosystem opportunity is vast, but it will only be captured by those willing to shake up traditional models, challenge legacy assumptions, and embrace evidence-based partner management.

The future belongs to vendors who treat their ecosystems not simply as channels, but as collaborative relationships built on a genuine desire for innovation, growth, and customer success.



About Amigos

We're a specialist B2B technology growth enablement business, invested in the belief that marketing should share in the accountability for revenue, not exist alongside it.

As such, channel growth comes from connected ecosystems, not isolated campaigns and siloed activity, which is the traditional, legacy model.

Our subscription-based services help businesses adapt to that shift with an offer that equips the Channel ecosystem with a revenue network, the tools to engage customers, support partners, and tie marketing to commercial results that align with buying cycles.

Contact

 0330 133 6306

 shelley.hirst@theamigosnetwork.com

 www.theamigosnetwork.com

 The Amigos Network

Appendices

Industry References:

The shift toward data-led ecosystem strategies is not theoretical; it's being actively shaped and validated by leading analysts, vendors, and market platforms.

This evolution is ongoing, and staying informed through trusted, forward-looking research is essential for any vendor or partner aiming to lead in 2026 and beyond.

The references below show a growing body of research and insight that shows why change is urgent. From Canalys' forecasts on IT and channel spending, to Forrester's analysis of MDF effectiveness, and AWS's co-sell advantage, these sources highlight how partner ecosystems are evolving into measurable, outcome-driven growth engines.

They also reinforce what we are all experiencing - the need for vendors to rethink distribution and their relationships with partners, embrace automation, and align with marketplace dynamics.

Sources and References:

- Canalys (2024). Worldwide IT Spending and Channel Forecasts 2025–2028.
- Canalys & AWS (2023). The Co-Sell Advantage.
- Gartner (2024). Global IT Spending and Cybersecurity Forecasts.
- Equinix (2024). Global Interconnection Index GXI.
- Forrester (2023). The State of MDF Effectiveness.
- Clover Infotech (2025). European IT Spending Forecasts.
- Computer Weekly (2024). Global Cybersecurity Spend Outlook.