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Frost Radar™: Privileged Access Management, 2026

A Benchmarking System to Spark Companies to Action - Innovation That Fuels New Deal Flow and Growth Pipelines

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PG6S-74
May 2026

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Strategic Imperative and Growth Environment

Source: Frost & Sullivan

List of Abbreviations

- **AD:** Active Directory
- **AI:** Artificial Intelligence
- **API:** Application Programming Interface
- **BYOV:** Bring Your Own Vault
- **CI/CD:** Continuous Integration and Continuous Delivery
- **CIEM:** Cloud Infrastructure Entitlement Management
- **CLI:** Command Line Interface
- **CPS:** Cyber-Physical Systems
- **DevOps:** Development and Operations
- **EDR:** Endpoint Detection and Response
- **ELA:** Enterprise License Agreement
- **EMEA:** Europe, the Middle East, and Africa
- **EPM:** Endpoint Privilege Management
- **GenAI:** Generative Artificial Intelligence
- **GTM:** Go-to-Market
- **HSM** : Hardware Security Module
- **HTTPS:** Hypertext Transfer Protocol Secure
- **IAM:** Identity and Access Management
- **ICS:** Industrial Control Systems
- **IdP:** Identity Provider
- **IGA:** Identity Governance and Administration
- **IoT:** Internet of Things
- **ISPM:** Identity Security Posture Management
- **ITDR:** Identity Threat Detection and Response
- **ITIL:** Information Technology Infrastructure Library
- **ITOM:** IT Operations Management
- **ITSM:** IT Service Management
- **JIT:** Just in Time
- **KVM:** Keyboard, Video, and Mouse
- **MCP:** Model Context Protocol
- **MFA:** Multi-Factor Authentication
- **ML:** Machine Learning
- **MSP:** Managed Service Provider
- **MSSP:** Managed Security Service Provider
- **NHI:** Non-Human Identity
- **OT:** Operational Technology
- **PAM:** Privileged Access Management
- **PUBA:** Privileged User Behavior Analytics
- **POC:** Proof of Concept
- **R&D:** Research and Development
- **RDP:** Remote Desktop Protocol
- **ROI:** Return on Investment
- **RPA:** Robotic Process Automation
- **SaaS:** Software-as-a-Service
- **SCIM:** System for Cross-domain Identity Management
- **SDK:** Software Development Kit
- **SecOps:** Security Operations
- **SI:** System Integrator
- **SIEM:** Security Information and Event Management
- **SLA:** Service-Level Agreement
- **SMB:** Small and Medium-Sized Businesses
- **SOAR**: Security Orchestration, Automation, and Response
- **SOC:** Security Operations Center
- **SSH:** Secure Shell
- **TACACS+:** Terminal Access Controller Access-Control System Plus
- **TCO:** Total Cost of Ownership
- **UBA:** User Behavior Analytics
- **VAR:** Value-Added Reseller
- **VNC:** Virtual Network Computing
- **XDR:** Extended Detection and Response
- **YoY**: Year-over-Year
- **ZSP:** Zero Standing Privileges

Source: Frost & Sullivan

Strategic Imperative

- In recent years, enterprises have transformed how they operate through widespread adoption of hybrid and multicloud environments, SaaS applications, DevOps pipelines, APIs, automation, and AI-driven systems. While these changes have improved agility and scalability, they have also multiplied privileged identities, accounts, and access paths across human users, machines, workloads, third parties, and emerging AI agents, exposing the limits of legacy, vault-centric PAM models built for static environments.
- PAM programs are shifting from isolated controls to continuous, identity-centric privilege governance as organizations demand solutions that can discover, govern, and enforce least privilege dynamically across constantly changing environments. However, this shift has increased operational complexity as security teams struggle to interpret and manage large volumes of signals without clear insight into which privileged identities and access paths present real risk.
- PAM is no longer an option, but a foundational security capability. It is no longer limited to credential vaulting, instead increasingly acting as a policy-driven control plane that governs JIT access, ZSP, session controls, secrets management, and endpoint privilege enforcement. Effective PAM solutions continuously reduce risks by enforcing privilege decisions at the point of use or in real time, enabling a more resilient security posture in an evolving threat landscape.
- As PAM matures across dynamic environments, coupled with the strong demand for cloud-native PAM, complementary capabilities including CIEM, secrets management for DevOps and machine identities, third-party access, IGA, and ITDR are increasingly essential. When unified, these capabilities bridge gaps created by siloed tools; offer better visibility across privileged accesses, identities, and accounts; and support cross-domain correlation for risk-based privilege decisions, making it easier to enforce consistent policies across different environments.

Source: Frost & Sullivan

Strategic Imperative (continued)

- By correlating signals across these domains, modern PAM platforms can prioritize high-risk privilege exposures based on context, behavior, and entitlement risk. This convergence places PAM at the center of identity-centric security strategies, increasingly integrated with IAM, IGA, CIEM, SIEM, XDR, ITSM, and DevOps workflows to enable automated response and continuous control.
- Several trends are shaping the next phase of PAM. The rapid growth of NHI has redefined the privilege landscape, while agentic AI introduces autonomous actors capable of executing privileged actions at machine speed, driving demand for stronger guardrails and execution-time enforcement. At the same time, SaaS-first and managed delivery models are becoming essential to address skills shortages and accelerate adoption globally.
- As the PAM market expands across overlapping domains, vendors are approaching the space from different legacy strengths. This has increased innovation but also intensified competition and blurred differentiation. To stand out, PAM platforms will need to evolve to converge into unified, intelligent control planes that deliver continuous visibility, runtime enforcement, automation, and scalability across all identity types.
- Ultimately, organizations must transition from static, compliance-driven controls to continuous, autonomous, identity-centric privilege governance. PAM platforms that enforce least privilege dynamically across humans, machines, and AI agents will define the next generation of PAM.

Source: Frost & Sullivan

Growth Environment

- The PAM market saw a steady growth rate of 19.7% in 2025. This indicates that PAM is entering a period of sustained growth as organizations invest in managing and reducing privileged risk across expanding digital estates.
- Frost & Sullivan anticipates a compound annual growth rate of 23.9% from 2025 to 2030, driven by the shift to subscription-based, SaaS-driven, and cloud-delivered PAM; the rapid growth of NHIs; and increasing regulatory scrutiny. Demand is no longer limited to traditional vaulting or password rotation; instead, it stems from multiple privilege-driven use cases as well as the convergence of PAM with identity security and adjacent security technologies.
- The PAM market revenue trajectory reflects the shift from predominantly on-premises deployments to cloud-delivered and hybrid models. As customers modernize, cloud- or SaaS-based PAM continues to gain momentum and is expected to surpass on-prem PAM in revenue in 2026.
- North America leads the global PAM market. The cybersecurity landscape in the region is more mature, with high cloud readiness and strong momentum toward SaaS-delivered and subscription-based PAM. EMEA remains the second-largest PAM market, following similar adoption patterns but progressing more conservatively because of data sovereignty, privacy requirements, and longer procurement cycles; nonetheless, regulations continue to ensure steady demand. Asia-Pacific and Latin America contribute smaller percentages of revenue but are expected to grow at faster rates as compliance regimes tighten, awareness of privilege-based risk increases, and MSSP-led and multitenant SaaS delivery models lower adoption barriers.

Source: Frost & Sullivan

Growth Environment (continued)

- For much of the PAM market's early development, adoption was concentrated among very large and large enterprises, which typically invest in full-suite PAM platforms and favor multiyear contracts with advanced capabilities to manage privilege risk across complex environments. In recent years, while very large and large enterprises continued to see strong growth, the availability of simpler, SaaS-based PAM offerings, lower TCO pricing tiers, and MSSP-led deployment models has made PAM more accessible to medium-sized businesses. The mid-market was the top revenue contributor for PAM in 2025.
- Frost & Sullivan studies related to this independent analysis:
  - Privileged Access Management, Global, 2025–2030 (PG6T, to be published soon)
  - Frost Radar™: Privileged Access Management, 2024
  - Growth Opportunities in the Privileged Access Management Market, Global, 2024–2028
  - Frost Radar™: Privileged Access Management, 2023

Source: Frost & Sullivan

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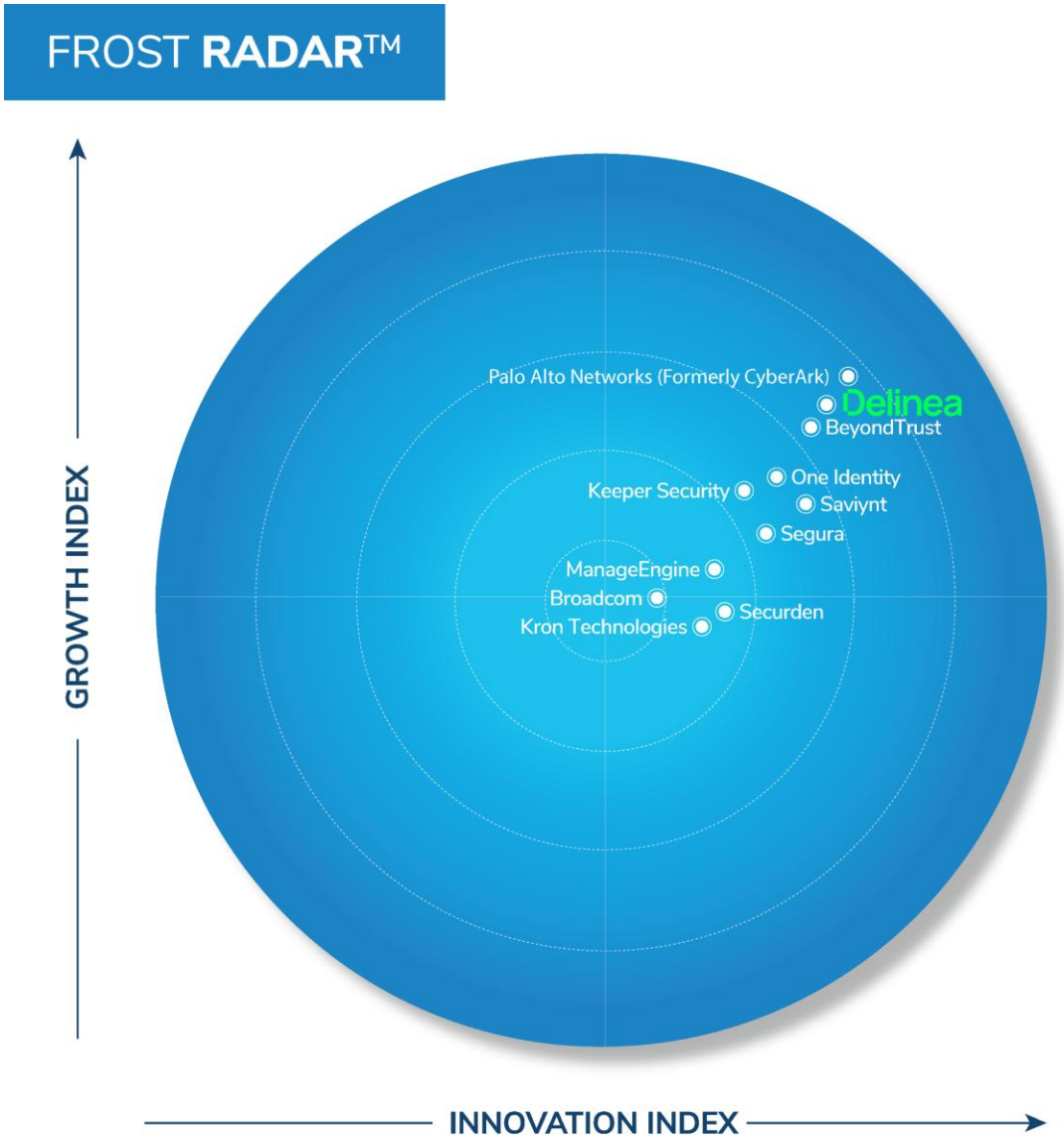
Frost Radar™: Privileged Access Management

Source: Frost & Sullivan

Frost Radar™: Privileged Access Management



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Source: Frost & Sullivan

Frost Radar™ Competitive Environment

- Frost & Sullivan shortlisted and assessed the top 11 PAM leaders for this Frost Radar™ analysis based on the criteria of having a minimum 0.5% PAM market share globally and a business presence in at least three regions of the world (i.e., North America, EMEA, Asia-Pacific, and Latin America).
- PAM market participants include legacy vault providers, SaaS-native challengers, identity platform vendors, and infrastructure-centric security players, but the traditional lines are blurring. Most leading vendors now deliver a hybrid model combining vaulting, session management, JIT/ZSP enforcement, secrets governance, and analytics while supporting at least some level of third-party integration and cloud delivery. Pure vault-only models are rapidly losing relevance, while fully open or enforcement-centric PAM architectures are emerging as differentiators.
- The three core PAM value propositions that define differentiation continue to be identity-centric integration, particularly the ability to govern privileged access across human, machine, workload, and AI identities; meaningful automation, including risk-based access decisions, AI-assisted session analysis, and movement toward autonomous or policy-driven enforcement; and breadth of environment coverage, spanning endpoints, servers, cloud consoles, DevOps pipelines, third-party access, and emerging OT/IoT or AI-driven use cases.
- Each vendor brings a unique focus and capabilities and often supplements them with adjacent capabilities. As the market converges, the competitive complexity of the PAM market makes vendor comparison and rating more challenging. Frost & Sullivan evaluated vendors across a broad set of criteria, including their advancement in runtime enforcement capabilities, platform convergence, AI adoption, delivery models, ecosystem integration, R&D investment, revenue growth, geographic execution, sales and partner strategy, and customer alignment.

Source: Frost & Sullivan

Frost Radar™ Competitive Environment (continued)

- Ultimately, competitive differentiation in PAM is narrowing as core capabilities converge. Successful vendors will evolve toward unified platforms capable of delivering continuous visibility, runtime enforcement, automation, and scalable delivery across global environments. Execution maturity, ecosystem depth, and the ability to govern privileged access at machine and AI speed will increasingly determine long-term competitive advantage.
- PAM vendors selected for this Frost Radar™ analysis are BeyondTrust, Broadcom, Palo Alto Networks (formerly CyberArk), Delinea, Keeper Security, Kron Technologies, ManageEngine, One Identity, Saviynt, Securden, and Segura®.To ensure fair scoring and comparison, Frost & Sullivan excluded certain vendors that met the inclusion criteria but were unable to share detailed insights into their business performance and PAM solutions.
- Palo Alto Networks (formerly CyberArk) stands out as the Growth and Innovation leader, driven by an established foothold among very large enterprises, extensive partnerships, and robust cross-sell momentum across its identity security portfolio. Its recent acquisitions, regional investments, and localized delivery have sustained its above-market YoY growth and the largest market share. Its leading position on the Innovation Index is reinforced by pioneering advances in runtime enforcement, ZSP, machine identity security, and early leadership in AI-agent governance, low-latency secrets access, and a broad integration ecosystem.
- Delinea and BeyondTrust closely follow on the Growth and Innovation indices. Both vendors have benefited from growing momentum driven by more accessible delivery models and a continued market shift toward subscription-based, SaaS-delivered PAM. While both serve large enterprises, they resonate with the upper mid-market, where customers seek enterprise-grade PAM with reduced operational complexity and faster time to value.

Source: Frost & Sullivan

Frost Radar™ Competitive Environment (continued)

- On the Innovation Index, Delinea and BeyondTrust are notable counterparts to Palo Alto Networks (formerly CyberArk). Both vendors invested in AI-driven analytics, continuous visibility, anomaly detection, and risk prioritization. Their respective roadmap plans acknowledged the market shift toward autonomous runtime authorization and closed-loop remediation. Delinea has made progress in runtime and execution-focused privilege control through its built-in AI engine and Iris Auditing, while BeyondTrust focuses on reducing privilege sprawl, emphasizing privilege exposure reduction via Identity Security Insights and adaptive risk scoring..
- One Identity holds a solid position on both Frost Radar™ indices because of its brand reputation and consistent market share. The company has enhanced its identity-first platform strategy. Its unified platform spanning PAM, IGA, IAM, and AD management differentiates it from bolt-on and patch legacy architectures. However, its advancement in runtime enforcement, incorporation of AI, and NHI governance remain limited compared with leading innovation peers.
- Saviynt is positioned more prominently on the Innovation Index because of its identity fabric-centric PAM strategy. While One Identity excels in hybrid deployment parity, Saviynt stands out for SaaS-scale identity orchestration, reinforced by innovations in JIT access, NHI governance, AI-assisted analytics, and aggressive investment in runtime authorization and agentic AI access governance. As these capabilities mature, Saviynt is well positioned to emerge as a strong contender against incumbent PAM vendors.
- Keeper Security is one of the key market players on the Growth Index, largely characterized by strong revenue acceleration, expanding market share, improving geographic reach, and consistent execution of a cloud-centric strategy. Its zero-knowledge, SaaS-first architecture aligns well with long-term market shifts, though additional innovation depth will be needed to stand out more clearly on the Innovation Index. While smaller in absolute scale than established PAM leaders, Keeper's growth trajectory, partner expansion, and regulatory credentials position it as a credible and fast-rising competitor.

Source: Frost & Sullivan

Frost Radar™ Competitive Environment (continued)

- Segura is another notable challenger, with its rebranding from Senhasegura to Segura® in 2025 signaling a move toward a more scalable, identity-centric PAM platform. Early investment in post-quantum-ready PAM connectivity highlights a forward-looking R&D plan. However, Segura's limited presence in North America, gaps in key certifications, and weaker emphasis on dynamic JIT/ephemeral access and NHI governance constrain competitiveness globally.
- ManageEngine, Broadcom, Securden, and Kron Technologies all deliver strong foundational PAM, but lag in next-generation capabilities as the market shifts toward cloud-native, AI-driven, and NHI-centric PAM. Broadcom and ManageEngine position PAM as part of broader enterprise or IT ecosystems, both enabling operational consolidation and cross-sell opportunities in large installed bases. Yet both, alongside Kron Technologies, remain constrained by limited cloud security features and will need a clearer and more forward-looking PAM roadmap to stay relevant.
- Securden emphasizes lightweight, end-to-end usability, while Kron Technologies focuses on OT-centric and governance-heavy PAM use cases. Both vendors maintain smaller footprints (with Securden lacking a Latin American presence in 2025 and Kron Technologies remaining largely concentrated in EMEA) and will need better alignment between innovation strategy and regional execution to build sustained growth momentum.

Source: Frost & Sullivan

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Frost Radar™: Companies to Action

Source: Frost & Sullivan

Delinea

INNOVATION

- Delinea's innovation strategy focuses on making enterprise-grade PAM easier to deploy, operate, and scale through unified engines and connectors in a single control plane, especially for organizations that prioritize usability and time to value alongside security depth. The Delinea Platform offers a broad PAM portfolio spanning credential vaulting, session monitoring, granular JIT and just-enough privilege (JEP) controls, and strong MFA enforcement. It supports SaaS, hybrid, multicloud, and on-premises deployments, including air-gapped environments, while covering all identity types, including NHI and AI.
- A defining strength of Delinea's approach is its emphasis on ease of administration and reduced deployment friction, with implementations measured in weeks rather than months. In 2025, Delinea expanded its intelligence layer with Iris Auditing, a native AI engine embedded in the platform that enables real-time session analysis and anomaly detection. This was complemented by AI agent discovery; human, machine, and agentic access analytics; ISPM for on-premises AD environments; and enhancements to the browser plugin to strengthen credential management and remote access capabilities (including HTTPS and VNC), improving usability. The capabilities strengthen Delinea's ability to continuously discover privilege risk and surface actionable insights without excessive manual tuning.

Source: Frost & Sullivan

Delinea (continued)

INNOVATION

- Delinea demonstrates strong alignment with PAM megatrends, including continuous discovery; ZSP; ephemeral/JIT access; agentic AI access governance; CIEM; integration with IGA, ITDR, and ISPM capabilities; AI-driven analytics; and early adoption of quantum-safe encryption algorithms. Supporting this is an extensive integration ecosystem, with over 600 prebuilt integrations across more than 145 vendors spanning ITSM/ITOM, SIEM, SOAR, IAM, MFA, IGA, cloud platforms, endpoint protection, databases, and infrastructure tools. Delinea's native integrations enable bidirectional sharing of identity risk signals, automated remediation workflows, and proactive alerting for identity-based attacks and posture issues.
- The company's follow-through on AI-driven access reviews, AI-driven authorization, and agentic AI privilege right-sizing and authorization, alongside advancements in autonomous policy enforcement and consolidation of agents and engines, will strengthen Delinea's platform. Successfully executing on these priorities reduces infrastructure footprint, simplifies operations, and reinforces Delinea's strategic alignment with the evolution of PAM to agentic AI governance and runtime privilege controls.

Source: Frost & Sullivan

Delinea (continued)

GROWTH

- Delinea is one of the Growth Index leaders on the Frost Radar™ thanks to its massive presence in the market, growth pipeline, and sales and marketing strategy.
- In 2025, Delinea's estimated YoY growth outpaced the overall PAM market growth rate of 19.7%. The company has one of the leading market shares in the PAM space (increasing by more than 1.1 percentage points in 2025), underscoring strong growth momentum.
- The company's growth is anchored by a strong presence in North America, followed by EMEA, Asia-Pacific, and Latin America. Of all regions, EMEA has shown accelerating expansion while continued double-digit growth is expected globally, supported by SaaS-based PAM deployments. Delinea's acquisitions of Fastpath and Authomize in 2024 strengthened its upsell and cross-sell motion with stronger discovery, visibility and governance capabilities, extending coverage into identity analytics and security posture use cases.
- Through modular entry deals, Delinea allows customers, including smaller enterprises and mid-market organizations, to adopt enterprise-grade PAM without the complexity traditionally associated with large PAM platforms. This is reinforced by tiered, multichannel support offerings, contractual SLAs, and structured implementation and upgrade assistance. Pricing flexibility, as a result of a broad range of pricing package options combined with ease of deployment and low administrative effort, remains a differentiator.

Source: Frost & Sullivan

Delinea (continued)

FROST PERSPECTIVE

- Delinea stands out as a Growth and Innovation leader on the Frost Radar™, combining strong revenue momentum and operational simplicity. What initially set Delinea apart was its commitment to consolidating core PAM functions into a unified platform when organizations were seeking simplification and faster deployment. Since then, it has demonstrated consistent follow-through, expanding platform depth, scalability, and runtime relevance rather than remaining at the level of architectural consolidation.
- The company's investment in AI has shifted from assistive analytics to continuous, intelligence-driven privilege control. A built-in AI engine enables the platform to go beyond periodic audits to always-on discovery, real-time session analysis, and anomaly detection, aligning with market expectations for continuous visibility and risk awareness across hybrid and complex environments. The evolution strengthens Delinea's ability to deliver insights and operational readiness as privilege risk increasingly unfolds in real time.
- With accelerating traction in EMEA and momentum in Asia-Pacific through SaaS-first and partner-led models, Delinea has maintained strong growth while preserving ease of adoption and time to value—an area where many large incumbent PAM vendors continue to face friction as complexity increases with scale. To strengthen its competitive posture, the company should continue to leverage its Delinea Partner Program to accelerate expansion and create a good balance of market presence globally, especially in Asia-Pacific and Latin America.
- The assessment of its Delinea Secret Server for FedRAMP High Authorization is aimed to be completed by 2026. Delinea should work toward capitalizing on the certification, enabling the company to expand into government, the public sector, and highly regulated industries.

Source: Frost & Sullivan

Delinea (continued)

FROST PERSPECTIVE

- Recent integrations have deepened identity analytics, posture management, and risk correlation, while extending control into modern access paths, NHIs, and service-based environments. While Delinea's acquisition of StrongDM in March 2026 aligns with its roadmap, the introduction of StrongDM's runtime authorization capabilities into the Delinea Platform, delivering real-time governance of privileged actions by AI agent and NHIs, is promising yet fairly new in the market. Achieving full and complete integration of acquired technologies while ensuring a smooth user experience would help Delinea keep pace with leading competitors and sustain competitive differentiation.
- Delinea's next phase of differentiation will depend on how effectively it translates its expanded intelligence and discovery capabilities into autonomous enforcement and closed-loop remediation. As PAM continues to shift closer to application runtime and machine-driven actors, leadership will be defined by the ability to anticipate, interrupt, constrain, and remediate privilege misuse as or before it occurs, beyond visibility. A continued focus on runtime authorization, agent and engine consolidation, and clearer articulation of AI-aware privilege governance will be important to sustaining leadership.

Source: Frost & Sullivan

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Best Practices & Growth Opportunities

Source: Frost & Sullivan

Best Practices

1. CISOs should adopt identity-centric PAM platforms that unify privileged access across humans, machines, and workloads under a single policy plane. Platforms will need to deliver continuous discovery of privileged identities, JIT access, ZSP, lifecycle governance, secretless authentication, and session management across hybrid, multicloud, SaaS, and DevOps environments. By enforcing least privilege at execution time rather than relying on static credentials, organizations can better preserve consistent governance.

2. Effective PAM programs should integrate with identity, SecOps, and compliance workflows to reduce operational friction and audit burden. Platforms should provide automated evidence capture for regulations while supporting continuous monitoring and audit-ready reporting. Risk should be prioritized using context, such as identity behavior, entitlement scope, and potential blast radius, ensuring that security teams focus on access that poses real business impact.

3. Selecting the right PAM vendor requires alignment with long-term security strategy, deployment flexibility, and execution maturity. Organizations should prioritize vendors that demonstrate strong SaaS and hybrid delivery, broad integration ecosystems, and a clear roadmap for NHI and AI-driven privilege governance. Vendors must also show proven customer success models, partner enablement, and the ability to scale globally without increasing operational complexity.

Source: Frost & Sullivan

Growth Opportunities

1. PAM vendors should prioritize platform convergence, replacing fragmented tools with a unified control plane. Whether through native capability expansion, partnerships, or targeted acquisitions, they should consolidate PAM capabilities into a single operational experience. Investments should focus on correlating identity risk, privilege paths, and runtime activity across cloud, hybrid, OT, and AI-driven environments to deliver measurable risk reduction and higher deal values.

2. Investing in AI-driven automation and agentic privilege governance will be critical for differentiation. PAM platforms should evolve toward policy-bounded autonomous workflows that support real-time access decisions, privilege rightsizing, and closed-loop remediation. AI used for session analysis, anomaly detection, and behavior-based authorization will enable faster response, less manual effort, and scalable governance aligned with emerging AI security and post-quantum requirements.

3. Vendors should strengthen partner-led and managed delivery models to expand adoption beyond top-tier enterprises. This includes multitenant SaaS architectures for MSSPs, regional data residency, and packaged entry-level PAM solutions for the mid-market. By embedding PAM into different ecosystems and enabling frictionless procurement through marketplaces, vendors can accelerate adoption, improve net retention, and position PAM as foundational infrastructure for modern SecOps.

Source: Frost & Sullivan

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Frost Radar™ Analytics

Source: Frost & Sullivan

Frost Radar™: Benchmarking Future Growth Potential
2 Major Indices, 10 Analytical Ingredients, 1 Platform

Growth Index

Growth Index (GI) is a measure of a company's growth performance and track record, along with its ability to develop and execute a fully aligned growth strategy and vision; a robust growth pipeline system; and effective market, competitor, and end-user focused sales and marketing strategies.

GI1

MARKET SHARE (PREVIOUS 3 YEARS)
This is a comparison of a company's market share relative to its competitors in a given market space for the previous 3 years.

GI2

REVENUE GROWTH (PREVIOUS 3 YEARS)
This is a look at a company's revenue growth rate for the previous 3 years in the market/industry/category that forms the context for the given Frost Radar™.

GI3

GROWTH PIPELINE
This is an evaluation of the strength and leverage of a company's growth pipeline system to continuously capture, analyze, and prioritize its universe of growth opportunities.

GI4

VISION AND STRATEGY
This is an assessment of how well a company's growth strategy is aligned with its vision. Are the investments that a company is making in new products and markets consistent with the stated vision?

GI5

SALES AND MARKETING
This is a measure of the effectiveness of a company's sales and marketing efforts in helping it drive demand and achieve its growth objectives.

Source: Frost & Sullivan

Frost Radar™: Benchmarking Future Growth Potential
2 Major Indices, 10 Analytical Ingredients, 1 Platform (continued)

Innovation Index

Innovation Index (II) is a measure of a company's ability to develop products/ services/ solutions (with a clear understanding of disruptive megatrends) that are globally applicable, are able to evolve and expand to serve multiple markets and are aligned to customers' changing needs.

II1

INNOVATION SCALABILITY
This determines whether an organization's innovations are globally scalable and applicable in both developing and mature markets, and also in adjacent and non-adjacent industry verticals.

II2

RESEARCH AND DEVELOPMENT
This is a measure of the efficacy of a company's R&D strategy, as determined by the size of its R&D investment and how it feeds the innovation pipeline.

II3

PRODUCT PORTFOLIO
This is a measure of a company's product portfolio, focusing on the relative contribution of new products to its annual revenue.

II4

MEGATRENDS LEVERAGE
This is an assessment of a company's proactive leverage of evolving, long-term opportunities and new business models, as the foundation of its innovation pipeline. An explanation of megatrends can be found here.

II5

CUSTOMER ALIGNMENT
This evaluates the applicability of a company's products/services/solutions to current and potential customers, as well as how its innovation strategy is influenced by evolving customer needs.

Source: Frost & Sullivan

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Next Steps: Leveraging the Frost Radar™ to Empower Key Stakeholders

Source: Frost & Sullivan

Significance of Being on the Frost Radar™

Companies plotted on the Frost Radar™ are the leaders in the industry for growth, innovation, or both. They are instrumental in advancing the industry into the future.

GROWTH POTENTIAL

Your organization has significant future growth potential, which makes it a Company to Action.

BEST PRACTICES

Your organization is well positioned to shape Growth Pipeline ™ best practices in your industry.

COMPETITIVE INTENSITY

Your organization is one of the key drivers of competitive intensity in the growth environment.

CUSTOMER VALUE

Your organization has demonstrated the ability to significantly enhance its customer value proposition.

PARTNER POTENTIAL

Your organization is top of mind for customers, investors, value chain partners, and future talent as a significant value provider.

Source: Frost & Sullivan

Frost Radar™ ,

STRATEGIC IMPERATIVE

- Growth is increasingly difficult to achieve.
- Competitive intensity is high.
- More collaboration, teamwork, and focus are needed.
- The growth environment is complex.

LEVERAGING THE FROST RADAR™

- The Growth Team has the tools needed to foster a collaborative environment among the entire management team to drive best practices.
- The Growth Team has a measurement platform to assess future growth potential.
- The Growth Team has the ability to support the CEO with a powerful Growth Pipeline™.

NEXT STEPS

- **Growth Pipeline Audit™**
- **Growth Pipeline as a Service™**
- **Growth Pipeline™ Dialogue with Team Frost**

Source: Frost & Sullivan

Frost Radar™ Empowers Investors

STRATEGIC IMPERATIVE

- Deal flow is low and competition is high.
- Due diligence is hampered by industry complexity.
- Portfolio management is not effective.

LEVERAGING THE FROST RADAR™

- Investors can focus on future growth potential by creating a powerful pipeline of Companies to Action for high-potential investments.
- Investors can perform due diligence that improves accuracy and accelerates the deal process.
- Investors can realize the maximum internal rate of return and ensure long-term success for shareholders
- Investors can continually benchmark performance with best practices for optimal portfolio management.

NEXT STEPS

- **Growth Pipeline™ Dialogue**
- **Opportunity Universe Workshop**
- **Growth Pipeline Audit™ as Mandated Due Diligence**

Source: Frost & Sullivan

Frost Radar™ Empowers Customers

STRATEGIC IMPERATIVE

- Solutions are increasingly complex and have long-term implications.
- Vendor solutions can be confusing.
- Vendor volatility adds to the uncertainty.

LEVERAGING THE FROST RADAR™

- Customers have an analytical framework to benchmark potential vendors and identify partners that will provide powerful, long-term solutions.
- Customers can evaluate the most innovative solutions and understand how different solutions would meet their needs.
- Customers gain a long-term perspective on vendor partnerships.

NEXT STEPS

- **Growth Pipeline™ Dialogue**
- **Growth Pipeline™ Diagnostic**
- **Frost Radar™ Benchmarking System**

Source: Frost & Sullivan

Frost Radar™ Empowers the Board of Directors

STRATEGIC IMPERATIVE

- Growth is increasingly difficult; CEOs require guidance.
- The Growth Environment requires complex navigational skills.
- The customer value chain is changing.

LEVERAGING THE FROST RADAR™

- The Board of Directors has a unique measurement system to ensure oversight of the company's long-term success.
- The Board of Directors has a discussion platform that centers on the driving issues, benchmarks, and best practices that will protect shareholder investment.
- The Board of Directors can ensure skillful mentoring, support, and governance of the CEO to maximize future growth potential.

NEXT STEPS

- **Growth Pipeline Audit™**
- **Growth Pipeline as a Service™**

Source: Frost & Sullivan

Next Steps

JOIN:
Growth Council

APPLY:
Companies to Action

ENGAGE:
Growth Dialog

PARTICIPATE:
Growth Council Think Tank

Does your current system support rapid adaptation to emerging opportunities?

Source: Frost & Sullivan

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Source: Frost & Sullivan