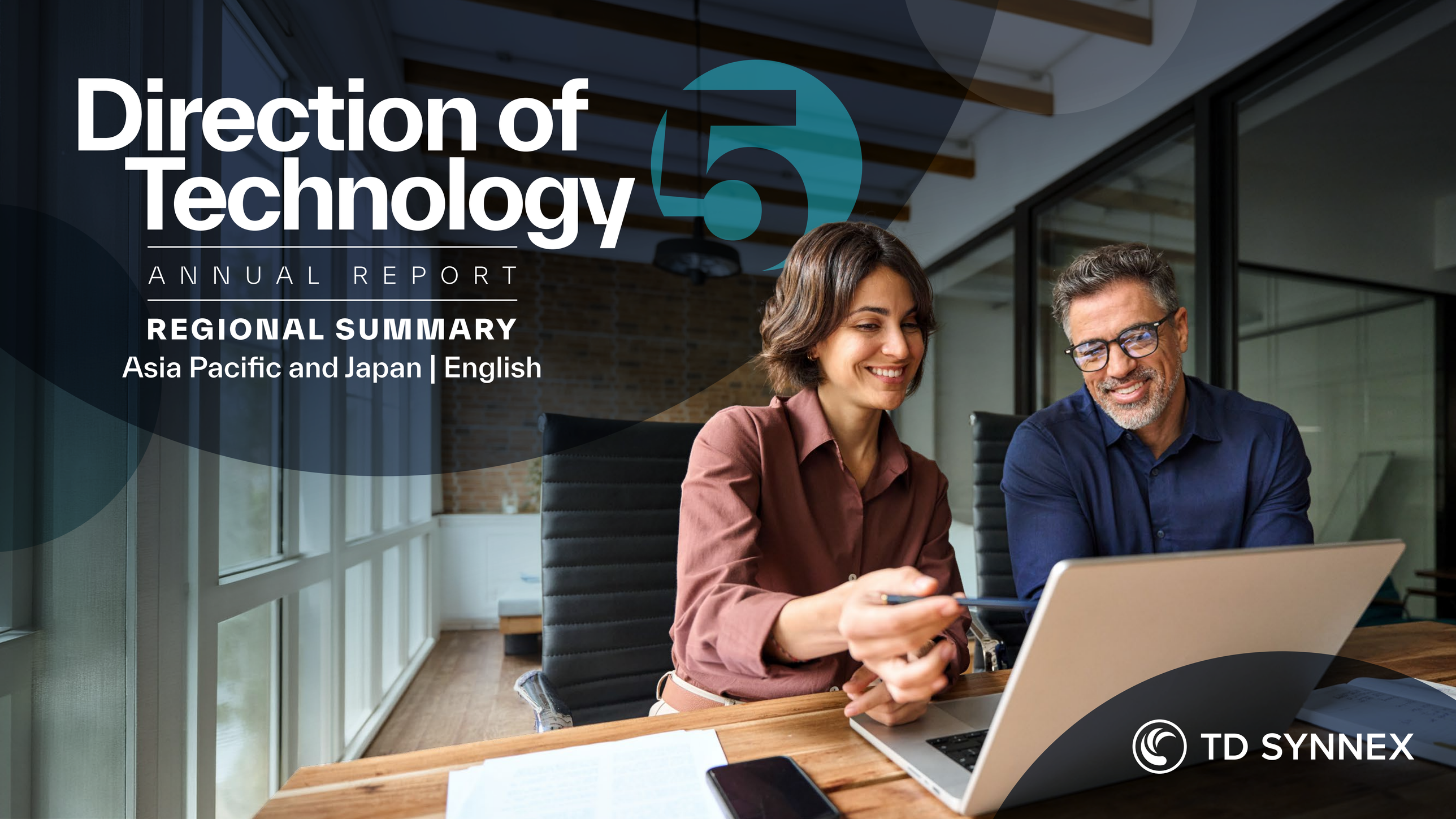
Direction of Technology 5

ANNUAL REPORT

REGIONAL SUMMARY

Asia Pacific and Japan | English



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THESIS

Customers need more than **technology that can**. They need **confidence that it will**.

Technology is becoming easier to access, buy and compare, while successful implementation is becoming more complex. That is shifting partners' value away from the transaction and toward the ability to create confidence in an outcome.

Feedback from more than 1,500 channel partners serving primarily small- to medium-size customers across 45 countries, including 374 from APJ, reveals a clear pattern: partners that can prove capability, translate technology into business value and earn trust are better positioned to capture growth now and remain relevant as the market changes.

I think that customer relationship and trust are proving to be more valuable than technical certifications.

MSP
NA

Customers increasingly value partners who understand their industry and solve complex problems with their expertise even though many vendors are still focusing more on technology than business know-how.

MSP
EMEA

Technology is becoming commoditized; customers compare prices in minutes. Trust and differentiation are key.

Systems Integrator
LATAM

One of the most underappreciated shifts in the IT channel is the move from product reselling to outcome-based services, especially with the rise of AI. Customers increasingly care less about the technology itself and more about the business results it delivers. Partners that can provide strategic guidance, AI expertise, security and measurable outcomes will be better positioned for long-term growth than those focused primarily on product sales.

Wholesaler
APJ

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ASIA PACIFIC AND JAPAN REGIONAL SUMMARY

1 **Growth alone** is no longer enough.

Business health is strong and services-led, but customer acquisition and tech integration create friction.

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Asia Pacific and Japan Executive Summary

APJ channel partners hold strong customer relationships, but market dynamics demand deeper technical execution. The path forward depends on shifting from reselling to outcome-based services. As macroeconomic pressures mount and marketplaces change the transaction, partners who pair trust with technical integration and post-deployment management will win.

About the sample: Most of those surveyed for the fifth annual Direction of Technology Report are small-to-medium-size channel partners, primarily serving small-to-medium-size customers.

Recovery has **taken hold**.

74% REVENUE GROWTH

of partners grew revenue this year (up from 69.5% in 2025 – a 4.5-point increase).

Macroeconomic factors are challenging that growth.

93%

Concerned about economic conditions (inflation, interest rates, costs).

88%

are concerned about supply chain disruptions (including chip/memory shortages).



Hardware and endpoint **anchor revenue.**

44% earn meaningful revenue from hardware and endpoint devices.

38% earn meaningful revenue from computing devices (PCs, AI PCs, Peripherals, Print).

34% earn meaningful revenue from data center infrastructure.

Services and high-growth technologies are **being built alongside.**

Services center on implementation and ongoing support.

68% say customers are asking for support & maintenance services the most today.

57% expect support and maintenance services to grow as a share of their total business.

Cloud, cybersecurity and AI are where partners are going next.

62% **Cybersecurity: increasing** investment.

62% **Cloud: increasing** investment.

59% **AI: increasing** investment.

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ASIA PACIFIC AND JAPAN REGIONAL SUMMARY

Proof turns capability **into outcomes.**

With AI maturity still developing in APJ, outcome confidence relies on helping customers move from experimentation to production.

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Partners are in the **early-to-mid stages of AI readiness.**



57%

self-identify as AI Ready or AI Experts.

Partners running on AI **win on every metric.**

What separates those already converting AI into revenue from those still mostly investing in it is internal maturity.

3x more likely to earn meaningful AI revenue.

Margin gain. **+24 POINTS**

5x more likely to see most pilots reach production.

Customer demand for AI spans multiple entry points.

45%

Agentic AI and workflow automation

Education, financial services and manufacturing/industrial services industries report the most demand for these solutions.

40%

AI-powered cybersecurity

Telecommunications and media and professional services organizations report the most demand for these solutions.

The opportunity is **moving from experimentation into production.**

Top blockers are work partners can own.



41% lack of internal skills or expertise to manage AI post-deployment.

40% security, legal, or governance concerns.

39% budget constraints or lack of financing options.

36% internal change management complexity.

Governance is no longer a separate compliance conversation. It's becoming a prerequisite for production, creating new opportunities for partners with the ability to support and deliver.

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ASIA PACIFIC AND JAPAN REGIONAL SUMMARY

3 Trust is the advantage that compounds.

Relationships open doors but building technical depth and cultivating their workforces for the future can help partners survive consolidation.

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The market **is shifting.**



79% agree the channel will see significant consolidation driven by AI capability gaps.

71% agree that cloud marketplaces will become the dominant buying channel.

Partners are feeling the competition directly.

45% see technology vendors selling directly to their customers as a top competitive threat in the next 2-3 years.

44% see AI-native shadow channel (AI-native companies that bypass traditional distribution and sell directly to your customers) as a top threat.

39% are concerned about software vendors expanding into services.

The formula for growth is **trust – with character and competence as the key ingredients.**

Partners' reasons for winning AI deals show both at work.

Character

48% We had an existing relationship - they came to us because they already trusted us.

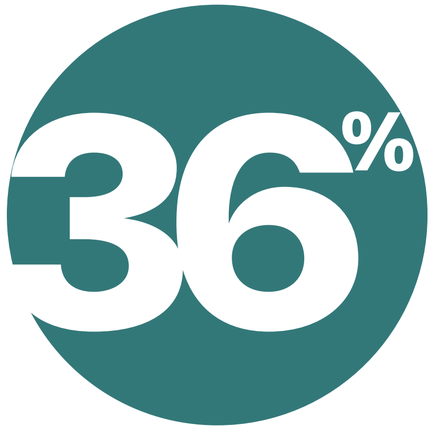
Competence

33% We had the deepest knowledge of their specific industry or business problem.

28% We could translate AI complexity into plain business language.

28% We had the strongest technical capabilities or certifications.

Customers are looking for **direction, not just solutions.**



say customers are asking them for AI technical implementation and integration.



are asking for a realistic assessment of where AI will and won't work for their specific situation.



are asking for AI governance, ethics and compliance advisory.

Partners are leading with learning and investing in building **future-ready workforces by blending technical depth with commercial capabilities.**

45% primary response to skills gap: training and certifications.

42% using AI tools to augment team capacity.

32% hiring and competing for talent.



Partners who evolve from trusted suppliers into hands-on orchestrators that manage post-deployment workflows, clarify ROI and solve integration barriers can **turn existing relationships into sustained value.** As technology becomes easier to buy, **the partners who own the outcome will be the hardest to replace.**

TD SYNNEX **customer testimonials.**

We rely on Tech Data for skills and expertise that we don't always have in-house. It's reassuring to know we can leverage their resources and specialist knowledge to help solve complex challenges.

Norm Jeffries
Managing Director, Truis

What stands out about Tech Data is the investment they've made in platforms built specifically for partners. The business insights they provide have helped us identify opportunities, improve operations and strengthen our business.

Thomas Jacob
Director, Microgenesis CADsoft

SOLUTION HIGHLIGHTS

Tech Data Center of Excellence (CoE)

As APJ partners look for support implementing, integrating and managing advanced technologies, Tech Data's Center of Excellence (CoE) helps partners turn complex opportunities into complete, outcome-driven solutions. From strategy through deployment, the CoE provides the expertise, tools and resources needed to simplify solution aggregation, navigate technical complexity and accelerate production-ready outcomes with confidence.

With a flexible regional model, streamlined aggregation capabilities, enablement platforms and deep expertise across high-growth technologies, the CoE enables partners to expand their capabilities, deliver greater customer value and pursue new opportunities while staying focused on their core business.

Learn more

Tech Data Practice Builder (Channel Academy)

As APJ partners expand into AI, cloud, cybersecurity and services, they need the technical expertise and commercial skills to turn opportunity into growth. Tech Data Practice Builder supports this journey through digital and hybrid training tailored to high-growth technologies and partners' specific business needs.

The platform combines self-paced learning with targeted enablement to help partners close skills gaps and strengthen their capabilities in strategic planning, technical pre-sales, sales and marketing. By building these capabilities, partners can equip their teams to translate customer needs into solutions that deliver measurable business outcomes.

Learn more

ABOUT US

TD SYNNEX

Making IT Personal™

At TD SYNNEX, we believe data matters most when it helps people act with greater confidence. That is why the Direction of Technology Report is more than a collection of findings. It's a core part of our story and our guide for turning insight into meaningful outcomes. By making these insights personal, practical and relevant, we can help our partners navigate change, build trust and move the technology industry forward. Together, we can own the outcome.

In Asia Pacific and Japan, TD SYNNEX goes to market as Tech Data in Asia Pacific and Tec D in Malaysia.

Safe Harbor Statement

Statements in this news release that are "forward-looking statements" within the meaning of Section 27A of the Securities Act of 1933 and Section 21E of the Securities Exchange Act of 1934 involve known and unknown risks and uncertainties which may cause the Company's actual results in future periods to be materially different from any future performance that may be suggested in this release. The Company assumes no obligation to update any forward-looking statements contained in this release.

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