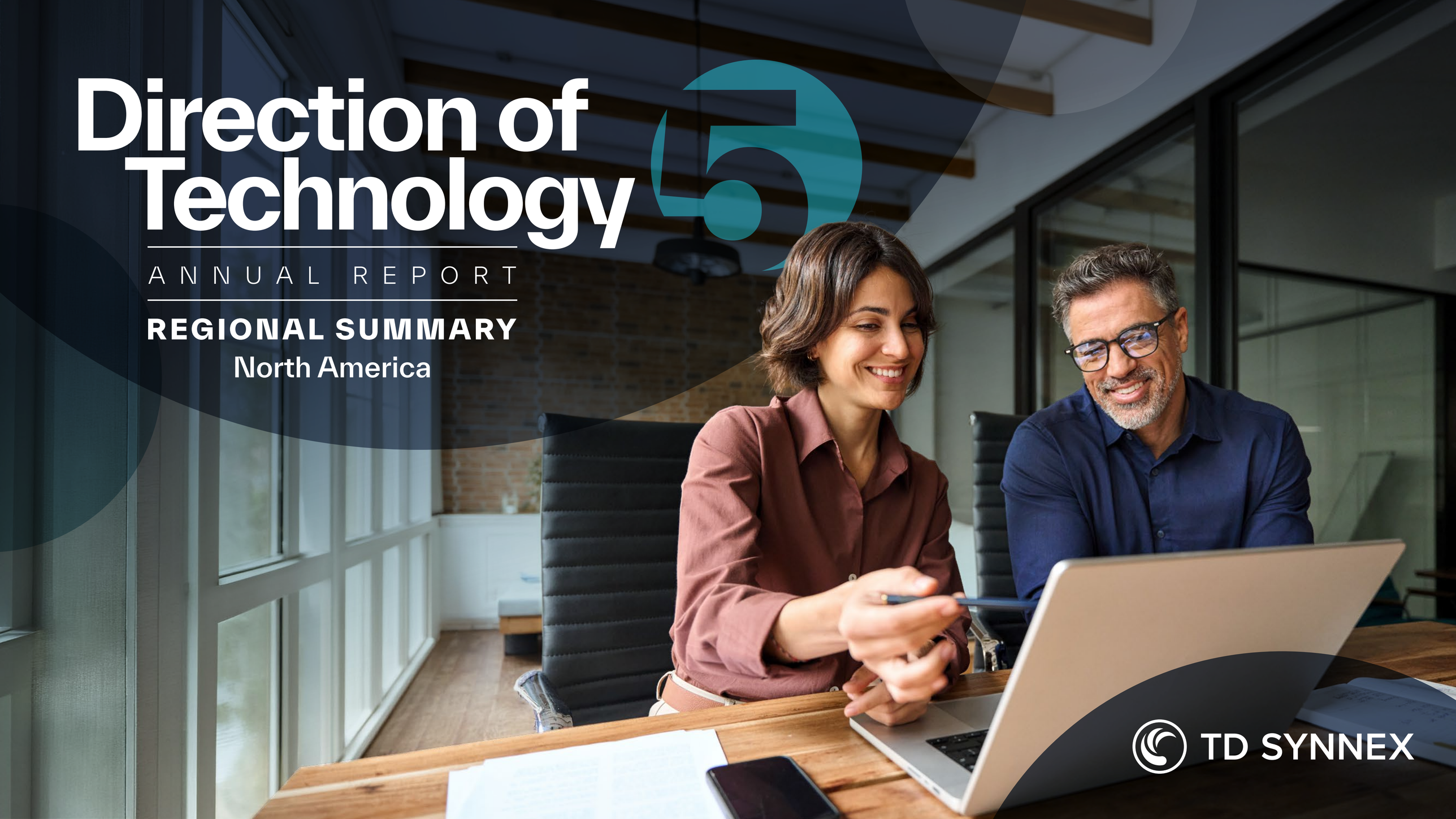
Direction of Technology 5

ANNUAL REPORT

REGIONAL SUMMARY

North America



TD SYNNEX

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 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

Direction of Technology 5

NORTH AMERICA REGIONAL SUMMARY

1

Growth alone is no longer enough.

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

TD SYNNEX

North America Executive Summary

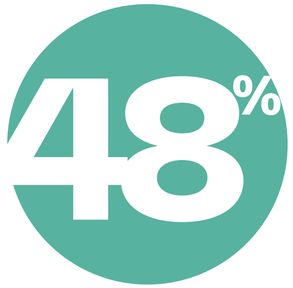
North American channel partners operate in a mature market where technology access is commoditizing, and vendors increasingly sell direct. Competitive advantage requires helping customers do more with the technology they're purchasing. Partners that move from delivery to advising on business transformation and governing complex environments will stay relevant.

Growth has taken hold in North America.



of partners grew revenue this year (up from 70.4% in 2025 – a 9.6-point increase).

Competitive positioning and integrating new tech with existing systems are challenging that growth.



customer acquisition and retention.



integrating new tech with existing systems.

Competitive positioning and integrating new tech with existing systems **are challenging that growth.**

43% say managed services account for more than 25% of their revenue.

33% say professional or advisory services account for more than 25% of their revenue.

72% expect managed services to grow as a share of their business.

Investment is concentrated in high-growth technologies more than every other category.

75% **Cybersecurity: increasing** investment

73% **Cloud: increasing** investment

72% **AI: increasing** investment



That demand **runs on infrastructure.**

As these technologies introduce new implementation demands and constraints, the physical layer becomes more important.

38% are increasing their investment in data center infrastructure.

34% expect hardware resell / endpoint device to grow as a share of revenue.

The AI-device refresh is creating an opening to own the complete stack, and partners are already moving toward this.

Packaging the physical layer alongside the solution layer and demonstrating customer outcomes is where margin leaving the transaction can reappear.

46% already deliver a quarter or more of their endpoint deals as end-to-end solutions.
(multiple layers of the stack layered together)

66% expect that end-to-end share to grow over the next 12 months.

Direction of Technology 5

NORTH AMERICA REGIONAL SUMMARY

Proof turns capability **into outcomes.**

Capability is no longer in question. Across North America, AI readiness and maturity are already established. The industry has moved beyond answering "Can we use AI?" to a more pressing question: "How do we scale it?"

TD SYNNEX

Capability is established **and essential.**



88%

of North American partners self-identify as AI Ready or AI Experts.

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

The market is increasingly rewarding partners who can bring proof to the conversation.

3x more likely to earn meaningful AI revenue.

Margin gain. **+38 POINTS**

3x more likely to see most pilots reach production.

The main challenge is moving customers from experimentation to production.

The biggest barriers aren't just technical. They're operational.

47% cite an unclear business case or ROI as a barrier to scaling AI.

Citing security, legal, or governance concerns. **44%**

39% say customers want change management and adoption support that their current offerings don't fully deliver.

Each of those challenges is work **partners can own.**

Governance is the clearest case. Demand is there; monetization is not.

56% say customers are asking about governance, but it's bundled in/not separately monetized.

26% are already paid to advise on it – a real revenue stream.



Agentic AI is another implementation and **ongoing management opportunity.**

54% see opportunity in helping customers design and deploy agentic workflows.

52% see it in managing and monitoring AI agents as a managed service.

Direction of Technology 5

NORTH AMERICA REGIONAL SUMMARY

3 Trust is the advantage that compounds.

As buying routes shift and consolidation looms, customer relationships built on business fluency and guidance become irreplaceable.

TD SYNNEX

The transaction is moving, and partners feel it.



83% agree cloud marketplaces will become the dominant buying channel.

73% anticipate significant partner consolidation driven by AI capability gaps.

Top competitive threats are

51% Vendors selling direct.

44% AI-native shadow channel.

41% customers building in-house.

The advantage becomes being a partner **customers can trust because of character and competence.**

Partners' reasons for winning AI deals show both at work. Technical acumen and certifications remain the foundation, but competitive advantage comes from going beyond technology expertise to help customers understand what it means for their business—and how to act on it.

Character

46% We had an existing relationship - they came to us because they already trusted us.

29% We were honest about what we didn't know.

Competence

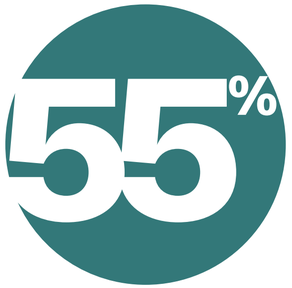
43% We could translate AI complexity into plain business language.

41% We had the deepest knowledge of their specific industry or business problem.

39% We had the strongest technical capabilities or certifications.

Partners who lead with learning build trust.

As many AI conversations start from pressure or uncertainty as from needing a solution to a specific business problem.



A business problem they need to solve.

Competitive pressure—a peer or rival has moved on AI and they feel they need to as well.





Their technology vendors (e.g., Google, Microsoft, Salesforce) are rolling out AI features they want to take advantage of.

Partners who can educate and guide are better positioned to become trusted advisors, helping customers navigate uncertainty with confidence.

This starts with building a future-ready workforce that runs on AI, not one that just sells it.

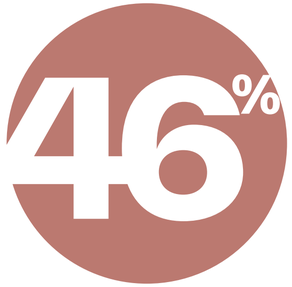
They're focused on building skills to operate AI systems and drive customer adoption.



are hiring and competing harder for talent.

prioritize skills for managing and orchestrating AI agents and automated workflows.





prioritize change management and helping customers adopt AI.

They look to distributors **for value-added services, not just logistics.**

Cloud platforms are the top value driver

45%

value cloud marketplace and management platform, reinforcing the distributor role in enabling cloud adoption and scale.

Services are equally critical

42%

selected distributor services as one of the capabilities that matter most to the business.

Financial enablement is a differentiator

32%

prioritized financing and credit support, highlighting the importtance of commercial flexibility in partner growth.



Growth doesn't protect you anymore. **Win in the business of trust.**

As technology access becomes less differentiated, trusted guidance is more valuable. Customers want to adopt AI and other advanced technologies, but many still need help deciding where to begin, building the case for change and bringing their people with them.

That gap is an opportunity partners can own. The partners that translate complexity, guide adoption and stay accountable through implementation will turn technical capability into customer confidence. As technology becomes easier to buy, the partners who own the outcome will be the hardest to replace.

TD SYNNEX **customer testimonials.**

(Our partnership with TD SYNNEX) is important to us. We greatly value it, and it's really how trust and loyalty keep continuing. They are a trusted, empowering partner.

Kegan Adams
Chief Operating Officer
Charter

We couldn't have done it alone. TD SYNNEX brought finance, integration facilities, and subject matter specialists to the table. Even conservative finance folks took a leap of faith on us — trusting a small reseller with $100 million. That trust was everything.

Steve Hull
President and Co-Founder
Westwind Computer Products

SOLUTION HIGHLIGHTS

Partner Health & Fitness

Partner Health and Fitness is a data-driven assessment tool from TD SYNNEX that analyzes partners' business performance, portfolio diversification and growth across key technology areas using a proprietary algorithm. By providing personalized benchmarks, scores and actionable insights, the tool helps partners identify new business opportunities, diversify their offerings, make more informed growth decisions and better support customers' digital transformation initiatives.

Learn more

PartnerLINK

PartnerLINK keeps you future-ready on your growth journey with partner-led communities that link you to exclusive benefits, enablement, access, incentives, market intelligence and specialized support. Whether you're driving high-growth technologies or expanding and refreshing infrastructure while offering services, PartnerLINK unlocks opportunities and capabilities to strengthen, empower and boost growth. TD SYNNEX's partner-centric approach links highly engaged partners with innovative market leaders to build collaborative and knowledgeable community networks.

Learn more

Solution Verified

Today's biggest barriers aren't technical. They're operational. Customers need evidence that AI can deliver measurable business outcomes in the real world, and the market is increasingly rewarding partners who can bring proof to the conversation.

TD SYNNEX has taken a different approach to AI enablement by becoming its own first customer. Solution Verified is TD SYNNEX's method of validating solutions inside its own business to generate proven outcomes, operational insights and repeatable best practices before they go to market.

The next phase of AI will be won by those who can prove outcomes. Becoming Solution Verified is how to get ahead.

Learn more by contacting your TD SYNNEX account representative.

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.

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.

Copyright 2026 TD SYNNEX Corporation. All rights reserved. TD SYNNEX, the TD SYNNEX Logo and all other TD SYNNEX company, product and services names and slogans are trademarks of TD SYNNEX Corporation. Other names and trademarks are the property of their respective owners.