

# CHANNELN€OMICS



## THE EUROPEAN ELITE

In association with



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# Welcome to The European Elite

*Welcome to the inaugural publication of The European Elite, a major new report from Channelnomics Europe*

The *European Elite* project aims to define and map the most important channel firms from across the breadth of Europe — covering everything from Svalbard to Seville, and from Tblisi to Tipperary. This report contains detailed profiles of 200 Elite players, as well as 125 Ones to Watch and, in addition, summary information on the Best of the Rest — covering a further 500 firms. This means that a total of 825 companies are featured here.

In defining the elite, we considered a range of factors. Of course, size and scale played a part, and a number of those among the top 200 will be hugely familiar names with a massive global presence. But it was far from our only consideration. Many companies have been included based on their outstanding and unmatched level of technical certification with major vendors. Others have led the way in their markets in recent years in terms of organic growth or M&A. Some are among the first and fastest movers in new and emerging technology areas. While others are simply key components of a relatively small ecosystem; a €30m VAR in Cyprus, for example, wields much more influence than a French company of the same size.

But we do not wish to pretend that the findings of our research are anything other than inherently subjective. This is not intended to be a definitive rundown of Europe's biggest resellers, systems integrators, and MSPs. But rather a wide-ranging overview of the companies that currently define the channel across Europe, as well as those that will do so in the years to come. Our list has divided the continent into six major regions: Benelux; Central and eastern Europe; DACH; France and southern Europe; the Nordics; and the UK and Ireland.

In addition to the company profiles, we also have comment on the market dynamics and key trends in each region, interviews with a diverse selection of company leaders, and a feature examining what channel players across the continent require from their manufacturer partners — and what vendors must do to make an impact in Europe.

## All the world's a stage

The rationale for publishing this report now — and, indeed, our conviction when we launched *Channelnomics Europe* in 2014 — is that channel firms need to start operating with far more



**“There are many ways a channel firm can explore opportunities beyond their borders, and no strategy is better than another. Included in this report are profiles of small, local players that have embarked on a pan-European shopping spree, as well as multibillion euro-revenue megaliths that have opted, instead, to partner with counterparts on the ground in other territories”**

consideration for the world beyond their national borders. For resellers and MSPs, both their end-user customers and their vendor partners wish to work with companies that can offer a consistent service across a range of territories and markets.

The internet and cloud computing models have made expanding an enterprise internationally easier than ever, and moving into overseas markets is now a realistic prospect even for small businesses. And those companies — especially the smaller ones — would rather work with a single trusted partner than with a ragbag of differing IT providers across the world.

Likewise, many vendors would prefer to focus on core channel partnerships that allow them to cover as many geographic and vertical markets as possible. To prosper in today's market, VARs must consider how to take what they are best at and recreate it on a bigger stage.

Which does not necessarily mean they need to invest

tens of millions of euros (or pounds, or koruna, or zloty) in staffing an office in every major city across the continent — although that is one way to do it. Many resellers have forged relationships — formally or informally — with peers in other territories. Others work with trusted local fulfilment providers. Some may consider merging with or acquiring a rival in another country, and then using the increased scale and cashflow as a beachhead for further expansion and growth.

There are many ways in which a channel firm can explore opportunities beyond their borders, and no single strategy is better than another. Included in this report are profiles of small, local players that have embarked on a pan-European shopping spree, as well as multibillion euro-revenue megaliths that have opted, instead, to partner with counterparts on the ground in other territories.

However they do so, it is crucial that channel players begin to think about the market and the opportunities therein in the same borderless way as do their customers and suppliers. At least if they wish to stay part of the elite.

We hope you enjoy this first-of-its-kind report, and encourage you to get in touch with your thoughts and feedback — good, bad, or indifferent. We are already looking forward to seeing you again next year.

■ Sam Trendall is content editor at Channelnomics Europe.

# European market changes are driving innovation

As an established European provider of IT channel services, we at Agilitas have seen a fair bit of change and development in the European channel over the years. Whatever your political position or view of Europe's economic challenges, it is impossible to deny that we are witnessing one of the most interesting operational environments the industry has faced.

Economic and political disruption is wreaking havoc and creating opportunities across the entire European market, changing the balance of power throughout the technology channel. At the same time, territories further afield are becoming more global and far less nation-state focused. Business is rarely just conducted on a national level, and we are increasingly taking a global view of the market.

Brexit presents possibly the greatest impending change. However, we are confident that the close ties that already exist between the UK and its European customers, partners and suppliers in the channel will only continue to grow. Today's existing relationships will define the positive relationship the UK can have with its European partners on leaving the EU. With such close ties existing throughout much of the channel, the sector can play a critical role in building new and cementing old relationships to drive future business growth for all.

At Agilitas, we are seeing three key trends that we believe are set to shape the European market in the future: innovation; collaboration; and disruption. To truly succeed organisations need to differentiate, adopt new ideas, work together, and look to change markets.

If we look at the channel, traditionally organisations have sought to be masters of all services. However, with declining margins and financial pressures — at least in the last decade — this has become more of a challenge. Looking to the future, a collaborative approach to business is set to see significant traction. Already we're seeing change; according to our own research a quarter of channel businesses revenue comes as a result of utilising skills from and partnering with other companies. Furthermore, what is also particularly revealing of business intentions is that 61 per cent are looking for new companies to partner with between now and 2020.

## Core strength

Market demand across the European channel has been continually high over much of Agilitas' history. However, looking to the future, with competition coming from multiple



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countries, staying aligned to core customer needs will become of even greater importance. Businesses already have access to a wide array of suppliers, but with economic pressure, competition will grow as players look to lead specific regions. Innovation is set to play a crucial role as a result. Interestingly, according to our research, technology and solutions are the areas surveyed that business leaders believe will require the highest levels of investment in order to remain aligned to customer needs.

Times of changing markets and customer priorities will also bring opportunities that can be leveraged through new disruptive and new market strategies. The impending introduction of GDPR legislation to protect consumer data security is already expected to create a number of opportunities across the technology market.

According to our research, new-to-market and cloud providers are the ones to

watch in the channel. However, that's not to say that more traditional resellers cannot steal the limelight. Cloud providers have traditionally been more disruptive than other players simply because their entire businesses are built on agile principles. Looking to these innovators could pay significant dividends, and I'm expecting to see market disruptors emerge across Europe in the coming years. The rise is due to come alongside a growth in the millennial workforce — set to hold over a quarter of channel leadership positions by 2020.

In these environments, understanding who Europe's elite are and what they are doing to succeed couldn't be more essential to driving growth.

With Brexit and the continued fracturing of some aspects of the European community comes challenges and it is for this reason that I'm so pleased for Agilitas to be associated with this insightful and thought-provoking first edition of *The European Elite* report from *Channelnomics Europe*.

Throughout my career in the IT channel, I don't think I've ever seen an environment quite like the one we're operating in today. That being said, I don't think I've ever been as intrigued as now to understand what it is that is making the channel's elite players succeed, thrive, and theorise about the future. I hope you enjoy the report.

■ Shaun Lynn is chief executive of Agilitas  
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# BENELUX

## The Elite

Neighbours Belgium, the Netherlands, and Luxembourg formalised their first union in 1943, and the three countries have enjoyed close social and economic bonds ever since. Considering that its combined population is barely a third of that of Germany, which borders all three countries to the east, Benelux punches above its weight – culturally, politically, and financially.

The region also has more than its share of elite IT channel players, and the 82 companies named and profiled here contain some of Europe's biggest, brightest, and most well-regarded technology specialists.

The Benelux nations are brought even closer together by the fact that all three – alongside France, Italy, and West Germany – were signatories of the 1957 Treaty of Rome, which effectively created the forerunner of the modern-day European Union. This closeness is something the vast majority of the VARs on this list have taken advantage of, with most operating in at least two countries.

The companies presented here tend towards highly technically skilled services companies, with large squadrons of engineers and support staff. It is not hard to understand why, when you consider that Amsterdam, Brussels, and Luxembourg City are all within little more than an hour's flight from Berlin, Paris, and London. In addition to which, English is widely and proficiently spoken throughout the region, and the capital cities of Belgium and Luxembourg are key locations for the European Parliament. All of which makes IT services providers from Benelux an attractive choice for large global enterprise customers.



This small, Leuven-based Belgian company specialises in business intelligence and performance management tools. Its vendor partners include Microsoft, IBM, and Board, and it has customers in industries including retail and construction. It is often said that data is the modern world's foremost currency and, if that is true, then Acumen and its customers must be as rich as Croesus. The firm positions itself at the leading edge of big data and predictive analytics, and aims to help businesses understand their clients' behaviour – both past and future.



Headquartered in the eastern suburbs of Brussels, this company also has sales offices in France and the Netherlands, and product development centres in Sri Lanka and Slovakia. Its business is split into three units focusing on performance management and data governance, ICT service management, and hospital solutions. Aaxis employs in excess of 200 people and holds accreditations from vendors including Infor, IBM, Informatica, and Blackline. The company has created its own named methodology for implementing performance-management projects, which it calls Quest.



Operating across both Belgium and the Netherlands, this VAR has a wealth of high-level badges from a wide array of the IT industry's biggest vendors. AXI holds Gold accreditations from Oracle, IBM, Microsoft, HPE, Citrix, Lenovo, and Veeam, as well as Platinum status with HP Inc. It also lists VMware, Dell EMC, Nutanix, and ForgeRock as key partners. The firm employs 230 people and provides a range of hardware, software, and services to customers in industries including retail and government.



This management and technology consultancy has had an up-and-down history over more than 100 years, but has been ticking along steadily since a management buyout in 2009, which saw the company headquarters established in Amsterdam. Today the company employs almost 4,000 people globally and turns over in excess of €500m – a figure it aims to increase to €1bn by 2020. It provides technology products and services to clients across a wide range of public and private sector verticals, and works with most, if not all of the IT world's biggest vendor names.



This Belgium-headquartered company is one of the biggest forces in the Benelux IT market, with a comprehensive range of managed, cloud, and professional services. In addition to its homeland, the firm has offices in the Netherlands, Austria, Germany, Italy, Romania, Poland, and the Czech Republic. Cegeka has its own datacentre facilities, and can undertake big-ticket infrastructure projects, consultancy services, application rollouts and, from its Bucharest service centre, business-process nearshoring for clients. In 2015 the company turned over €369m, and its 3,600-plus staff serve in excess of 1,100 customers.



This e-tailer has been in business for 16 years and prides itself on being able to provide business customers with any ICT product they desire. In addition to its general-purpose web shop, the firm can also provide customers with account management and their own dedicated online portal. CentralPoint has offices in both the Netherlands and Belgium, and turns over around €120m a year. It holds a range of badges with the vendor landscape's biggest names, including Titanium status with Dell EMC, and an HP Platinum Partner certification.



This Belgian ICT integrator was founded in 1991 by Jef de Wit, who heads up the company to this day. Since 2010 Cronos has dedicated itself to the banking and insurance sector, in which it provides a range of consultancy and technical services, as



well as products including software, security, networking, and datacentre infrastructure. The firm pledges to compete on added business value — never on price, and claims it is “one of Belgium’s success stories”.



Last year this VAR took its annual sales past the nine-figure mark, as its top line expanded eight per cent to €103m. But despite the sales growth, operating costs were reduced marginally, and EBITDA excluding exceptional items spiked by a quarter to €7.5m. Headquartered in the central Dutch city of Veenendaal, Detron also has offices in Raamsdonkveer, Den Bosch, and Heerlen. The firm was founded in 2008 and lists Cisco, Microsoft, IBM, Mitel, Apple, and HPE as its core partners.



With a history that can be traced back over more than 125 years and a total of 4,600 staff in 22 countries worldwide, this company is one of the most significant players featured in this report. The firm was heavily involved in M&A action last year, first acquiring a cloud business from telecoms operator Colt, before selling off its Germany-based Getronics-IDS business, which represented €90m of its €550m top line. Getronics is also a member of Global Workspace Alliance, a collective of 11 major IT companies across the globe that have united to provide end-user computing services to customers.



This software integrator posted 2016 results that showed revenue rocketing up by a quarter to €89.7m. This figure was boosted significantly by sales gained from a chunk of business it acquired from services firm Dynniq, but organic growth came in at a solid eight per cent. Headquartered in the town of Barendrecht, south of Rotterdam, the company has a range of other locations throughout the Netherlands, and a subsidiary in Bulgaria. It employs 910 people.



This VAR has been publicly listed on the Euronext exchange since 1999, and turns over around €110m. It counts IBM and VMware as its major vendor partners, but also holds high-level badges with Cisco, Lenovo, and Pure Storage. Based near Antwerp, the firm has about 90 employees and offers an array of server and storage hardware, as well as security and data-management software, and a range of consultancy and cloud services.



While we were putting together this report this Leiden-headquartered VAR merged with another intended member of our Elite — fellow Dutch IT house Scholten Awater. The merged company will have revenues around the €600m mark, and 800 employees in 14 countries across Europe. The company’s goal is to create a true European giant that can serve customers ranging from consumers up to large enterprise and government.



The maxim has it that, in order to succeed, one must ‘get big,

get niche — or get out’, and this company features on our list to showcase the merit of specialising. With offices in Antwerp and the Dutch village of Oud Gastel, the company styles itself as the Benelux region’s leading IBM specialist, and provides a range of services and solutions built on Big Blue’s technology. Informa focuses on information management and business intelligence products.



With offices in Utrecht, London, and the Finnish city of Espoo, this company focuses on developing and deploying identity and access management products to customers across the continent. In addition to its own intellectual property, it also offers products from vendors including Dell, Ping, and One Identity. Its range of services includes professional and managed services, consultancy, integration and support, and training.



This Luxembourgian firm may be based in a country with fewer than 600,000 inhabitants, but that has not stopped it becoming one of the foremost IT providers in Europe. Having celebrated its 20th birthday last year, the firm has grown into an entity with offices in 13 countries across Europe, Africa, and Asia, as well as the US. It serves more than 500 customers, including telcos, financial institutions, and national governments.



Data is very much the watchword for this Utrecht-based company. Its stated focus areas are master data management, data integration, data quality, big data analytics, data visualisation, database management, and data warehousing. Its target verticals include retail, consumer banking, the public sector, and the manufacturing space. Last year it was named on a global list compiled by Gartner of 29 master data management providers.



Based in the Dutch town of Laren, Kadenza aims to help its customers “put data into the heart” of their organisation. Its offerings include self-service analytics, data warehousing, data governance, and a ‘Smart Finance’ offering for CFOs. It names Alteryx, Board, Denodo, IBM, Microsoft, and Tableau as its key software vendor partners, and it has customers in industries including leisure, media, financial services, and healthcare.



This company specialises in hybrid cloud, with a particular focus on providing solutions to markets that might be perceived as having cause to mistrust cloud services — such as government, healthcare, and financial services. With offices in Maastricht, Arnhem, and Eindhoven, Open Line is also taking a proactive approach to helping its customers prepare for the GDPR act that is set to come into law in 2018. Its core vendor partners include Cisco, Citrix, Dell EMC, AppSense, Microsoft, VMware, and Veeam.



This Dutch integrator has endured a difficult few years, but is

still a major player in the Benelux channel. Its 2016 revenues dipped slightly to €343.6m, but EBITDA increased more than threefold to €15.1m. The bottom-line boost — which defied a third straight year of sales decline — came following a €15m restructuring exercise undertaken since 2015. Turnover in Belgium and Luxembourg grew by almost 15 per cent to €87.5m last year — about a quarter of the total. Its focus for the coming year is returning to growth in its home country.



With more than 4,000 employees, state-owned entity Post Luxembourg is one of its home country's major employers. In addition to its core telecoms and postal services, the company is also a major player in the ICT scene and hosts data and services in five datacentre facilities. The firm turned over in excess of €700m in 2015.



In addition to being Belgium's biggest mobile operator, this company also has an IT solutions business that encompasses cloud services, security, and the internet of things. It also owns Telindus, an integrator that operates in the Netherlands and Luxembourg. Proximus' group revenue stands at almost €1.8bn.



With nine offices in the country — in addition to a Luxembourg outpost — this company is one of the biggest in the Belgian channel, and employs about 1,250 people. The firm divides its business into three areas: Strategic ICT; Tactical ICT; and Operational ICT. The former is where it addresses emerging technology, such as artificial intelligence, smart machines, and the IoT. In FY16 its turnover came in at €236.2m.



With the backing of investor InvestCorp this Belgian-headquartered security specialist went on something of a shopping spree in 2016, acquiring three business — the UK's Nebulas, Swedish outfit CoreSec, and German player iT-CUBE — in the space of six months. The focus will seemingly be more on organic expansion in the coming months, with a plan to hire 150 cybersecurity professionals this year, to add to its existing employee roster of 625. Following its acquisition splurge, run-rate revenues are around the €250m mark.



This Dutch cloud and managed services firm recently landed in the Nordic region via its acquisition of two Danish peers: Jaynet and Solido. Further expansion in the region is on the cards, with Sweden named as a long-term strategic target. Sentia employs about 270 people across three offices in the Netherlands, as well as an outpost in Belgium and its new Danish operation.



With 46 years of operation under its belt, this company is one of the more experienced ICT providers in this report. It trades across 12 entities, covering a range of vertical and

technological specialisms across the Benelux region and central Europe. Simac employs around 1,250 people, and has a wide range of vendor partners, including Canon, Cisco, HPE, IBM, Symantec, and SAP.



Based in the city of Hilversum, this €150m-turnover VAR claims to be “extremely proud” of being one of the largest privately owned IT firms in the Netherlands. It operates across four divisions, covering services, products, consultancy, and the temporary provision of IT staff. It covers the finance, government, and healthcare sectors. Some of its core propositions include analytics, cybersecurity, and cloud.



Billing itself as “an international consulting, service, and software company”, this Luxembourgian firm employs upwards of 1,600 people and operates in 50 countries. Its five operating units are dubbed Consulting, Services, Digital, Performance, and Software and it names Microsoft, Oracle, Esri, EMC, Google, and IBM as its major vendor partners. Revenue last year came in at €160.2m, with EBITDA margins of 15.5 per cent.



This €100m-turnover VAR operates from four locations in Belgium and a satellite office in Luxembourg and employs 320 people. It provides a range of hardware, software and services to both large enterprises and SMBs, as well as the public sector. It holds a wide array of high-level badges from the vendor landscape's biggest names, including certifications with HP, Cisco, Lenovo, IBM, Fujitsu, and Apple. The firm recently sold off a chunk of its non-core licensing business to US-headquartered reseller giant Insight.



# Q&A: Marco Barkmeijer

*Chief executive, SecureLink*

## **Where do you fit into the marketplace, and with whom do you compete?**

We are a specialist in cybersecurity and managed security services. We deliver solutions, consultancy, and managed services; we go much more into the managed security services. A report from PwC talked about the fastest-growing pan-European MSS players — us and NTT. Then there is a third: NCC. These are the companies we compete with. We also compete more and more with SecureWorks and Verizon. Then there are specialists in each country where we are.

## **What do see as your key differentiators?**

There is this shift in the market with regards to the traditional security operation companies, [moving] more to cyberdefence centre services. We think this is much more than monitoring; it is about detect and response, about how quickly you can detect and how can you respond. We really see a shift. The second differentiator is that we also still sell cybersecurity solutions, and we still have technical knowledge. Sometimes we are a pure-play MSSP, a lot of times it is a combination where we deliver the solutions, then take them into managed security services.

## **What role has M&A played in your development?**

Because we acquired all these companies, we acquired a lot of people and a lot of skills. The majority of the 700 new people working for SecureLink are technical people. We have this knowledge available. Another differentiator is that all five cyberdefence centres are in Europe. We follow our customers. We see in western Europe that, where we are active, we can now service our customers [locally] across those countries. At this moment we are just focusing on integrating the acquisitions we have done in the right way, and also delivering our services [in new areas].

## **Did you start out with a well-defined M&A plan, or was it more opportunistic than that?**

The origin was that in Benelux, SecureLink had quite a good market share. We had our own cyberdefence services. We saw that we needed to scale to stay on top of [new] services for our customers. Secondly, we saw the consolidation going on outside Europe with regards to companies getting together. We have seen it in the US, where they got together and become one big cybersecurity company. We started with a

strategy, we got some independent consultants who [advised us] that we could be the platform to consolidate the European market. That is why we did the acquisition strategy. The companies we have acquired have the same DNA as us, they are really technology-driven companies. And we still have the majority of people who started those companies participating in the group.

## **What do you look for in an M&A target?**

A couple of things. It is about making sure the DNA is a fit. They also need to be leaders in their market. We want to be number one or two in the markets we are active in. The third, which is less sexy, is just being honest about your competency. When we started, we saw in our management team that we did not have much experience of integration, so we looked for a team of specialists and hired them to make sure that we are one team, and one company. If you do not have the experience, you need to invest in people who have those skills.

## **What role do your private equity backers, InvestCorp, play in the company's strategy and growth plans?**

They have a long-term vision, and they also have very deep pockets! When we went through the process, we had quite a lot of interest from different private equity companies. We had a focus not only on money, but on added value. They were one of the few private equity companies that had proven experience in cybersecurity. They had invested in [US company] Fishnet, and they had a track record, with experience of this consolidated market. They have a highly skilled team, and they help with their experience and contacts that they have in the consolidation area. But we as management — and myself as CEO — are still absolutely responsible for the strategy and operations.

## **What are your KPIs for the coming years: revenue growth, increased margins, acquiring your way into new geographies — or something else?**

Our strategy is to be relevant for our customers, which probably means that we will become a leader in further markets — but that is not the goal. The goal is to become relevant with the services and the added value that we deliver to our customers. The result may be that we double in size — but that is not the goal, and never has been. It is just a result of doing what is relevant for our customers. That is the focus.





# Ones to Watch

## ■ Axxius

Based in the town of Hoofddorp, this company styles itself as one of the Netherlands' foremost specialists in middleware technology. The firm was founded in 1997 and works in the healthcare sector.

## ■ Cudit

This Belgian Microsoft specialist merged last year with Dutch peer Axon Olympus, as well as opening two new offices in the UK and Switzerland. With revenues in the region of €16m, the company has indicated its desire to open two more offices in Europe this year.

## ■ Dartalis

This 16-year-old Luxembourgian player specialises in information security and addresses industries such as financial services, healthcare, government, heavy industry, and telecoms. It claims to protect the IT of more than 45,000 individual users.

## ■ Docbyte

This company, which has offices in Belgium and Luxembourg, specialises in helping companies move from paper- to digital-based models. It was founded in 2006 and counts Xerox, OpenText, and Microsoft among its partners.

## ■ element61

This Brussels-based company specialises in business analytics and performance management, and counts IBM Cognos, Microsoft, SAP, Qlik, Tagetik, and Anaplan as its major partners. The firm celebrates its 10th birthday this year.

## ■ Illionx

Headquartered in Utrecht, this VAR has been in business for 15 years and partners with vendors including Microsoft, IBM, Oracle, Google, and SAP. Its business is divided into three core units: xecute, which focuses on technology; xplore, which is concerned with clients' business problems; and xperience, which addresses customer experience and business intelligence.

## ■ ITON

Focusing on the healthcare market, this Dutch IT provider employs 125 staff across three offices in the country. It provides a range of cloud-based desktop and server offerings.

## ■ Paphos

As a partner of cloud computing heavyweight ServiceNow, this Dutch company is surely among the hottest properties in the European channel at the moment. The firm, which also works with HPE, employs 60 staff who specialise in one or both of the two vendors' technology, and has completed 349 projects for 82 customers since 2006.

## ■ Quanza

With offerings in areas such as SDN, hybrid cloud, and DDoS protection, this Dutch player has a keen focus on emerging technology. It partners with vendors including Huawei, Cisco, HPE, Fortinet, Juniper, and Arista.

## ■ Satisco

With a turnover of €5.5m, this company may be among the smaller firms to feature in this report, but it has a wide reach, including offices in all three Benelux nations, plus France and Switzerland. The data integration specialist focuses on providing IBM technology and supporting services.

## ■ Tech-IT

This 10-year-old VAR has a strong skill set in the high-growth area of converged and hyperconverged infrastructure. Based in Luxembourg, it counts VCE, IBM, Cisco, Microsoft, and Dell EMC as its biggest vendor partners.

## ■ Tectrade

Based in the central Dutch city of Culemborg, this company focuses on the world of hybrid IT. In addition to IBM Platinum Business Partner status, it also holds badges with vendors including Pure Storage, Lenovo, NetApp, Dell EMC, Cisco, and VMware.

## ■ Van Roey

This Belgian IT provider offers customers a range of managed services, security, and cloud offerings and works in sectors including government and education. Vendor partners include VMware, HP, Fortinet, Symantec, and Microsoft.

## ■ Virtual Sciences

An IBM Premier partner, this company also works with open source technology and develops apps for customers in sectors such as central government, financial services, and automotive. It is based in the city of Nieuwegein, north of Utrecht.



# Best of the Rest

**4Launch** Eindhoven-based PC and component reseller

**ACA IT Solutions** IT provider with four offices across Belgium

**Aces Direct** Cybersecurity specialist established in 2000

**Acuity** Dutch company with units focused on ICT, CRM, and social business

**Advanced Programs Europe** Founded in 1992 as an IBM specialist

**Alcadis** Connectivity specialist based in the centre of the Netherlands

**Amplexor** Digital content management player from Luxembourg

**Aprycus** Partners with IBM, Lenovo, Huawei, and Oracle

**ARP** Provides hardware, software, and office supplies

**Axez ICT Solutions** Rijswijk-based HPE partner

**B-Blue** IBM specialist providing products, as well as consultancy and services

**Bossers & Cnossen** VAR based in Groningen

**e-office** Dutch software house focused on the digital workspace

**E-Storage** Utrecht reseller that describes itself as ‘the data company’

**ExtraVAR** provides datacentre infrastructure from the likes of IBM, Lenovo, and Intel

**Fanatic** Belgian IT and services house

**Ferranti** Microsoft Dynamics player with offices in Belgium, the Netherlands, the UK and Singapore

**FIT Global** Dutch SAP specialist

**Forcea** Provider of analytics applications with 43 staff

**Gemba Service** Focused on asset and service management with 20 years in business

**IDM Consulting** Offers consultancy and implementation services

**Impact Information Management** specialises in business intelligence for local governments

**Inergy Analytical Solutions** BI and big data firm from Woerden

**IT Creation** Papendrecht-based Microsoft, Dell, and VMware partner

**LACO** Belgian firm focused on big data

**LoQutus** Founded in 2002 and has offices in Ghent and Brussels

**MACS BV** Enterprise asset management firm based in Eindhoven

**Microfix** Offers repair services in for client and datacentre computing technology

**Network2day** Builds networks for voice and video

**NOVADOC ECM** Enterprise content management firm from Almere

**NV Panoptic** EMC partner founded 12 years ago

**Pixelixir** Offers infrastructure management and website-building services

**Portico Consultancy** Based in Amsterdam and creates online portals

**PQR** Delivers products and services focused on the hybrid cloud

**Silverside** Headquartered in Rotterdam and partners with Microsoft and IBM

**Solipsis** Dutch player that has grown through M&A in recent years

**SuadaSoft** Luxembourgian IBM Premier partner

**Switch IT Solutions** Impressive array of high-level badges from vendors including Apple and Lenovo

**You Get** Watergang-based business process management specialist

**ZNAPZ** Focuses on IBM’s Tivoli technology



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# CENTRAL & EASTERN EUROPE

## The Elite

All 200 Elite players profiled in this report feature here because they have irrefutably demonstrated that they have either the ability or the potential to grow into a major player. But it is fair to say that the 29 firms from the central and eastern Europe (CEE) region probably possess more cumulative growth potential than any other territory.

For our research, we considered firms based in or operating in a total of 23 countries: Albania; Armenia; Azerbaijan; Belarus; Bosnia and Herzegovina; Bulgaria; Croatia; the Czech Republic; Estonia; Georgia; Hungary; Latvia; Lithuania; Macedonia; Moldova; Montenegro; Poland; Romania; Russia; Serbia; Slovakia; Slovenia; and Ukraine. Each of these varies a little in terms of its maturity, but all could still justly be considered some way behind the IT markets in the major economies of western Europe.

Nevertheless, the CEE region has already created some channel giants, and has the potential to give rise to many more. You may notice that a large number of the companies featured below began life in 1990 or 1991 and, for the region's nascent IT channel, the fall of the Iron Curtain was perhaps perfectly timed. The last decade of the 20th century saw the everyday use of computing technology move from luxury to ubiquity, as PCs became cheaper, smaller, and more powerful, mobile telephones went from novelty to near-necessity, and the internet began to go mainstream.

The first 10 years of the new millennium saw a boom in outsourcing and nearshoring activities in the CEE region. During the decade numerous big American and western European tech firms set up support and service delivery centres in nations such as Slovakia, the Czech Republic, and Poland, having been attracted by the region's strong base of both language and technical skills, its comparatively cheap cost of labour and, in many cases, the new EU member status of its countries.

Throughout this time Russia has been, and continues to be, something of a law unto itself, but it is a huge country – geographically and populously – and those Russian companies that become big, get really big. Profiled here are a number of firms with a scale to rival even the biggest channel outfits of the UK or Germany.

In the coming years, while outsourcing will no doubt remain a key component of the CEE technology sector, individual countries' IT markets will start to become more self-sufficient as domestic enterprise and public sector investment grows. You can be sure that the Elite players gathered here will be ready to grow with them.



Based in Budapest, this company focuses on datacentre technologies, and has a wide range of vendor badges, including Gold-level accreditation with Cisco, Oracle, Fortinet, and Veeam. The company also offers an array of managed and maintenance services. Its customer references include major brands such as Audi, BNP Paribas, Lufthansa, and Bridgestone.

## ASSECO

This systems integrator and developer claims to be the biggest IT company listed on the Warsaw Stock Exchange, as well as Europe's sixth-biggest software vendor. Revenues in 2016 came in at almost €1.9bn. The business employs about 22,300 people and the group contains companies with offices covering 35 countries in Europe, as well as the US, Canada, Israel, and Japan. Asseco has been in business for a quarter of a century, during which time it has made numerous acquisitions.



Based in Moscow, this firm claims to be Russia's "market leader in comprehensive infrastructure and security systems". The company also provides consultancy, development of business applications, and outsourcing services. Avaya, Cisco, Microsoft, Commscope, HP, and SAP are listed as its core vendor partners. Asteros is a year away from celebrating its 20th birthday and employs about 1,600 people.

## ATENDE

This Polish player is a group covering eight different IT and software specialists in which it holds majority shares. Its most recent addition was A2 Customer Care, which was added to its stable in March, in a move it claimed fitted with its strategy to expand its operations in the energy sector. The group covers a wide range of product and services offerings, including systems integration, managed and professional services, cloud and hosting, and outsourcing. Turnover is in excess of €65m.

## AUTOCONT

This Czech VAR has more than 1,000 staff and revenues of about €150m. The firm, which also operates in neighbouring Slovakia, is divided into four divisions, addressing IT infrastructure, business applications, IT outsourcing, and enterprise solutions and applications. The privately owned firm has been in operation for 27 years and is headquartered in the north-eastern city of Ostrava.



Founded in 1996 to provide application software to Russian telecom operators, this company's name stands for Convergent Business Operation Support Systems. To this day the firm specialises in the same sector, and styles itself as "one of the world leaders in the development of innovative real-time highly available convergent IT solutions for end-to-end automation of telecommunications businesses", and offers solutions covering billing, CRM, network management, and business intelligence.



## COMARCH

This Polish company provides IT services, software, and products and has a top line of about €240m. Headquartered in Krakow, the business operates from 84 locations across 28 countries, and has delivered projects in a further 22 nations. Comarch employs some 5,500 people and has been in business for 24 years. It was founded by university professor and published author Janusz Filipiak.



This Croatian player provides services from eight centres in its home country, as well as three more in Bosnia and Herzegovina, and a location in the Serbian capital Belgrade. The firm, which turns over almost €70m, claims it can offer support to its customers on a 24/7 basis. The company was founded in 1990 and it holds accreditations with almost 70 vendor partners. It works with customers in sectors including telecoms, financial services, heavy industry, public administration, and the SMB market.



This Russian heavyweight provides a comprehensive set of hardware, software, consulting, managed services, maintenance, and integration services. Its headquarters and service centre is based in the Russian capital, and it also has an outpost in St Petersburg. The firm has been in business for 24 years, and claims to be the 12th-biggest IT company in Russia, and the sixth-most significant provider of services. Its business reportedly grew 17.8 per cent in 2016.



This firm claims to be one of the leading IT companies in the CEE region, and has offices in 11 countries across Europe and the US, including three technology centres in eastern European capital cities Ljubljana, Sarajevo, and Belgrade. The group is split into four entities, covering software, systems integration, hardware distribution, and media and advertising. Its major vendors include Intel, IBM, HP, Cisco, Citrix, Fujitsu, EMC, Oracle, and Microsoft. It works with customers in sectors such as finance, government, telecoms, healthcare, and the high-tech space.



Having been founded in 1990, this firm claims to be among Russia's 10 biggest IT firms, as well as one of the country's top three technology consultancies. Croc also claims to be the only Russian datacentre owner with a Tier III certification from the Uptime Institute, having achieved 99.982 per cent availability. The firm also believes it is "the only company in Russia to hold top authorisations from all global IT leaders", with a roster of 220 vendor partners.



This Czech VAR claims to be one of IBM's most important partners in the country, and achieved Platinum partner status with the vendor earlier this year. In recent years it has built out its skills in some of the IT world's hottest markets and most-hyped technologies, and the firm's business is now split into five areas: covering hardware and software infrastructure; asset management; document management; big data; and analytics. Concurrently, the firm has halved in size in the

last decade, but still turns over almost €25m, with profit margins also rising.



Another company focused on the big data and analytics sectors, this Russian firm employs about 1,000 engineers and architects. The company celebrates its 25th birthday this year, and offers its clients services including system integration, infrastructure design and implementation, software development, and outsourcing. It has Gold-level certifications from HPE, Cisco, and Microsoft, as well as Oracle Platinum Partner status.



With sales of just €15.6m turnover, this is one of the smaller players profiled in this report, but one of the most technically skilled. The Ukrainian firm employs 150 engineers across 13 offices in its home country, and has a wide selection of badges from upwards of 40 vendors, including big names such as Cisco, Oracle, HPE, IBM, and NetApp. It offers everything from datacentre to client computing, as well as software and services.



This Russian software development, system integration, and IT services company turns over about €450m and employs almost 2,800 people who hold a total of 3,400 different certifications, including many it claims are prized and rare. It has 15 locations in Russia, as well as outposts in Kazakhstan, Uzbekistan, and Azerbaijan. About three quarters of revenues are drawn from its core markets of financial services and insurance, the public sector, telecoms, and energy.



Beginning life in 1991, this Russian firm employs about 1,300 people across seven sites in its native land, as well as Azerbaijan and Kazakhstan. It is also delivering customer projects in Tajikistan, Armenia, and Georgia. The company has a wide range of high-level badges with leading vendors, including Platinum status with Oracle, and Gold badges from Cisco, NetApp and HP. Its business covers six core markets: government agencies; telecoms; finance and insurance; transportation; energy; and retail.



It may be headquartered in Austria, but this €300m ICT services player is a major presence across the CEE region, with operations in the Czech Republic, Slovakia, Hungary, Romania, and Poland. The firm employs 3,000 people, who serve a total of 17,000 customers. Its major vendor partners include Apple, Mitel, Avaya, Google, Hitachi, HP, Microsoft, and Cisco. The wider Kapsch group — which includes businesses focused on technology serving the carrier and transport sectors — has 6,800 staff, and has been in business for 125 years.



This €1.7bn giant claims to be Russia's biggest systems integrator, and among the country's 200 largest companies. It

encompasses 40 regional firms, employing a total of more than 9,000 people, and it claims 2,000 possess vendor technical certifications and that “many of them hold scientific degrees”. Its client base contains some of Russia’s largest institutions in industries such as banking, oil and gas, and manufacturing.



This Vienna-headquartered firm has a sharp focus on the IT industry’s newest hype sector: digital transformation. The company has subsidiaries in 15 countries, covering much of the CEE region, as well as the US, Canada, Australia, and Turkey. The company promises its customers that investing in digital transformation can boost their revenues by as much as 15 per cent, cut costs by a fifth, and improve their profits to the tune of 30 per cent.



Headquartered in the Slovenian capital Ljubljana, this company also has offices Serbia, South Africa, Saudi Arabia, Morocco, and the US. The firm holds a number of badges with core partners Cisco, VMware, and Microsoft, as well as accreditations from the likes of EMC, Pure Storage, IBM, and RSA. In addition to providing customers with datacentre, cloud, and security products and services, the firm also has a training business.



This is another firm that uses its base in neighbouring Austria as the beachhead for being a major player in the CEE region. The firm employs about 3,700 people in offices across 25 countries, and has a keen focus on emerging areas such as IoT and “industry 4.0”. In addition to reselling technology from vendors including HPE, HP, Microsoft, and Lenovo, the company also has its own intellectual property. S&T has revenues of €468.2m.



This Russian IT heavyweight has locations in 31 conurbations in its home country, as well as in a further 50 cities in about 30 countries in the wider CEE region, Latin America, Asia, and the US. It focuses on working in emerging markets, and this has perhaps been instrumental in what it claims has been a compound annual sales growth rate of more than 30 per cent in the last decade. The firm now turns over more than €700m.



This Slovakia-headquartered VAR and outsourcer also has operations in Turkey, Bulgaria, Romania, and the Czech Republic. In 2014 the company also landed in western Europe, with the establishment of a UK office, and has hinted that it may consider further expansion in Germany. Earlier this year it announced a partnership with UK players Secarma and UKFast in which the three firms will offer customers digital transformation solutions. The company’s turnover stands at €120m.



Based in Croatia, this firm has more than €30m in revenue and 300 employees – more than two thirds of whom hold technical certifications. The business is also the owner of

12 Gold Microsoft competency badges. The firm offers its customers cloud solutions, IT support, CRM, and licensing services and has been in business since 1993. It serves customers across more than 100 countries, and claims to fix 99.98 per cent of problems within the terms of its SLAs.



This highly certified HPE, Cisco, and Microsoft partner is among the key players in its domestic market of Slovenia. The company develops its own apps and has not been slow to move into the areas of big data, analytics, and digital transformation. In addition to its own solutions, the firm also works with vendors including IBM, Oracle, HP, Lenovo, and Microsoft.



With a top line of €30m, this firm may be one of the smaller players in this report, but it is a major player in its native Bulgaria, with offices in 10 cities across the country. The privately owned company was founded in 1991 by “four computer specialists”, and initially specialised in software development and providing computer equipment. Its business today covers six key areas: hybrid and private clouds; security; collaboration and productivity; big data; infrastructure; and mobility.



This Russia-based firm is a big player across the former Soviet countries, with eight offices in Russia, as well as locations in five other major cities, each of which is the largest conurbation in its country: Almaty in Kazakhstan; Baku in Azerbaijan; Uzbek capital Tashkent; Armenia’s Yerevan; and Minsk in Belarus. The company employs more than 2,700 people and its revenues exceed €800m. Its partners include Hitachi, HPE, Cisco, Juniper, Microsoft, Huawei, and Oracle, and its core vertical markets are telecoms, oil and gas, the public sector, manufacturing, transport, and financial services.



This buy-and-build player has been in business for 25 years, is based in the Estonian capital of Tallinn and now employs 100 people serving clients in its home country, as well as other parts of Europe, with Norway, Sweden, and Switzerland considered key markets. Microsoft, Oracle, and IBM are named as its biggest partners, and its business covers five main areas: software development; SharePoint solutions; mobile and cloud; search and big data; and software support.



This Cisco Gold partner also holds a wide range of the networking giant’s Advanced and Authorised Technology Provider badges, covering network, communications, server, and security technology. It also counts Metaswitch and EMC as important vendor relationships. The company employs 130 people and is headquartered in Zagreb, with operations in Albania, Kosovo, Bosnia and Herzegovina, Serbia, Slovenia and Turkey.



# Q&A: Tomáš Turkovič

*Head of outsourcing, Soitron*

## What does Soitron's business look like these days, and how did you get to this point?

In total for 2016 the group revenues were €120m. Probably €70m of that was [managed services and integration], with another 20 to 25 per cent from outsourcing. The story is very technical — in 1991 a couple of graduates from technical universities decided that they would set up their own company, Tronet, assembling PCs in a garage. Those two owners are still major shareholders of the company and are still active executives.

## How did the business evolve over the years?

We worked with Cisco, and implemented the first IP telephony platform in Slovakia, and the first videoconferencing system, and very quickly we became a Cisco Gold partner. The first significant change occurred in 2004. At that time, the company had up to 70 people. The strategic decision was taken to establish a delivery centre for EMEA in Bratislava. At that point we teamed up with a Spanish company called Soitsa and created a joint venture — Soitron. Both companies owned 50 per cent, and it was set up to deliver outsourcing services. Soitron [eventually] became 100 per cent owned by Tronet, and since 2006 we have grown from 70 people to 700.

## What sparked the outsourcing boom in central and eastern Europe?

[In Slovakia] we had a flat rate of income tax for everyone, the economy started to [grow], and the universities were focused on IT and languages. Bratislava became an attractive destination and, between 2002 and 2005, AT&T, IBM, Dell, HP [and others] all established delivery centres here. The cost of [labour] was also competitive. Now, these shared delivery centres employ 40,000 people. It has become a big part of the national economy.

## In the last 15 years have such centres begun to move further east, and are places such as Slovakia and the Czech Republic now less competitive?

I have travelled quite a lot over the last three years, to places such as Bulgaria and Romania. Those cost-saving centres are being moved more eastwards. I still feel that Slovakia is interesting, but for specialist or high added-value services. Also Bratislava is on the border with Austria, so the German language is very well spoken and you cannot find this [further east]. This is what gives it a little bit of a competitive advantage. This year we have already made a strategic decision to establish Soitron in Poland. We are trying to cover the CEE region and this will [offer] an alternative. Having a mix of CEE countries can be very interesting from a cost [perspective].

## How significant was the opening of a UK office, and is more western European expansion likely?

Entering the UK market, we wanted to bring nearshoring as an alternative to offshoring. And we wanted to be closer to where the decisions are being made. We had been studying places around western Europe, and we came here two and a half years ago

because 25 per cent of our business is outsourcing, and they are the biggest [outsourcing market] by far in Europe. The initial goal was to have the UK office as a [front] office, rather than a delivery location. But last year we were awarded a huge contract and now, for the first time, we have 25 people [delivering services from the UK]. For this project we have 20 people in the UK, 15 in Slovakia, and 70 people in total, delivering from four countries. We just presented to the board a new strategy for the next four years. Probably 50 per cent of our revenue in outsourcing will come from the UK office; it is our goal to get there in four years. If we have core competency centres in CEE, but also [for example] in France, Spain, Germany, and Portugal, that will be a competitive advantage.

## How will the outsourcing business develop from here?

The outsourcing division is set to grow revenue by more than double, and we want to cover more locations in terms of delivery — Poland this year, and probably Hungary next year. We would like to move to services with more added value. Our KPIs are revenue growth, and turning the UK into a sales hub. By 2020 we will have €40m revenue, including €17m from the UK.





# Ones to Watch

## ■ CAD R&D Progress Group

This Bulgarian software player is a major Microsoft partner, holding the vendor's Licensing Solutions Partner badge. It also counts Dell as an important manufacturer relationship, and has been in business for upwards of three decades.

## ■ Digital Design

This Russian DevOps specialist has a staff roster of about 500 workers and has been in business for more than 20 years. In addition to its own solutions, it also works with partners including Dell, Kaspersky, VMware, Oracle, and Veeam.

## ■ ikubINFO

Another software-development player, this Albanian company celebrates its 10th birthday this year. Its staff includes 70 developers, and it focuses on the public sector.

## ■ InfoDom

This Croatia-based software specialist also has offices in Serbia, Montenegro, and Bosnia and Herzegovina, as well as a presence in western Europe via its Brussels office. Partners include Microsoft, Alfresco, IBM, Oracle, and EMC.

## ■ Informatika

This Serbian VAR has its own business applications, as well as offering products from the likes of Dell EMC, Fujitsu, Microsoft, and Oracle. In addition to its reseller, ISV, and services business, it also provides training on a number of vendors' technologies.

## ■ IT Group

With 650 staff and a wealth of vendor badges, this Russian firm claims to offer its customers the IT world's "entire range of services and solutions". Its business covers applications, infrastructure, managed services, and vertical solutions.

## ■ Kontrax

This Sofia-headquartered systems integrator is an important player in its homeland and, indeed, has focused exclusively on Bulgaria since the turn of the century. It works with a range of enterprise customers in both the private and public sectors.

## ■ Semos

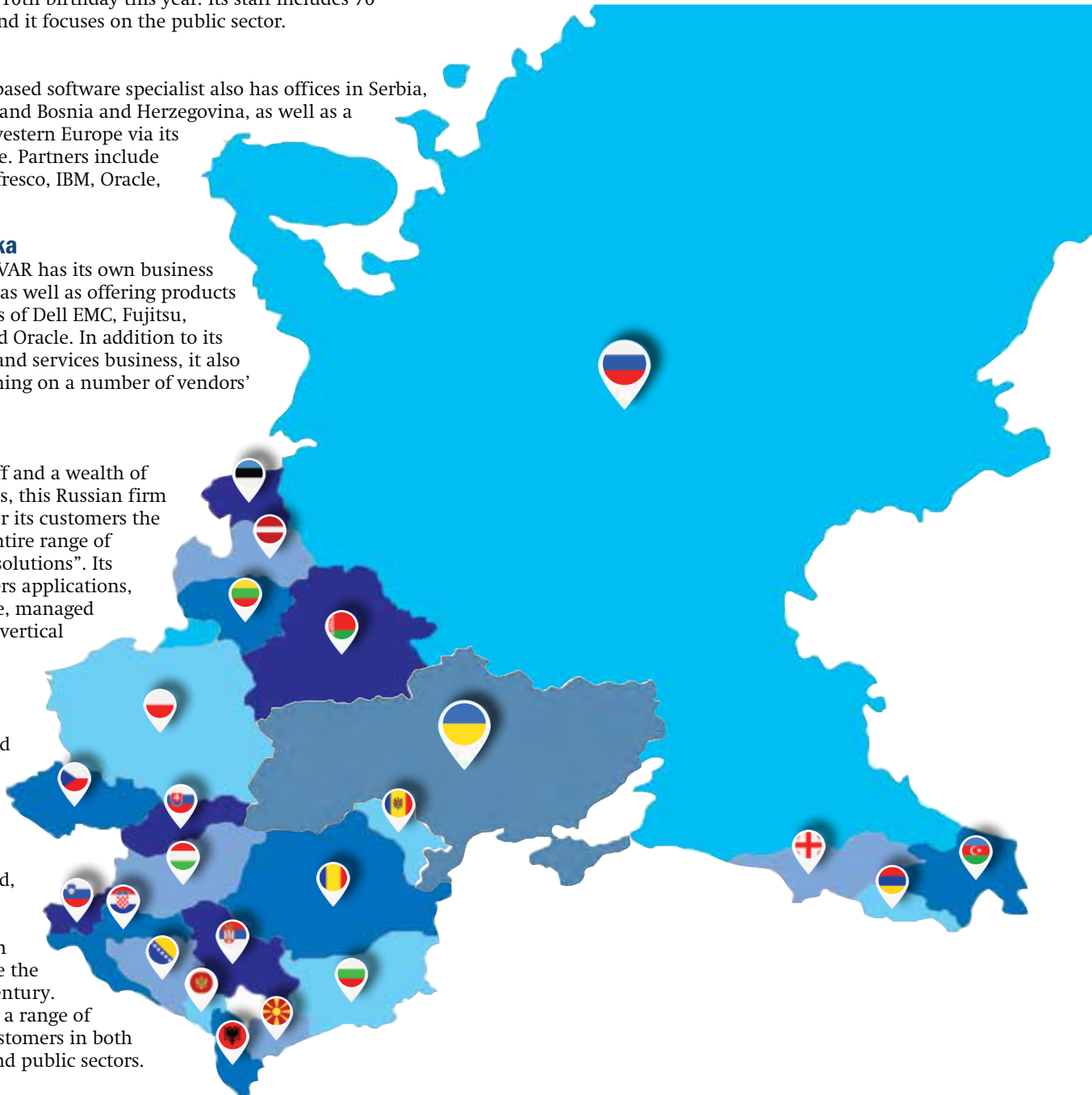
This Macedonian software house is also a big provider of training services. It is a certified provider of courses for vendors including Microsoft, Cisco, Oracle, and VMware.

## ■ Senetic

This broker-cum-VAR has a growing array of official badges from various vendors. It has offices in 11 countries spanning eastern, central, and western Europe.

## ■ Softec

This ISV and integrator is based Slovakia and has operations in nine other countries across the CEE region. Its partners include HP, SAS, Microsoft, and Oracle.





# Best of the Rest

**ADD Solutions** Slovenian Microsoft partner and ISV

**Advatech** Wroclaw-based integrator

**AMT Group** Has 150 technical people among its 400 staff

**Anect** Czech Cisco house

**Armsoft** Armenian ISV

**Atlantis Communications** Russian telecoms and networking VAR with 400-plus staff

**Averbit** Polish reseller that works with IBM, HPE, Huawei, Lenovo, and Cisco

**BAIP** Estonian VAR that provides software, hardware, and life cycle services

**Bittnet** Romanian Cisco partner and training house

**Bonair** Polish VAR that address the financial services sector

**CDP** Czech company offering IT infrastructure

**Cloudware** Polish systems integrator

**Cocon** Polish hardware VAR

**Complete** IT services company

**Crescendo** Claims to be the first solution house in Romania

**Cronus** Romanian Cisco house

**CTI** Another Cisco partner, based in Russia

**DC Logic** Russian integrator

**Delta Group** Big VAR player in Hungary

**Diatom** Latvian software development house

**Ditec** Slovakian VAR with sales of more than €50m

**Domino Corporate Solutions and Services** Polish solutions and services provider

**Duna** Hungarian IT house

**Enterpoint** Ljubljana-based provider of IT and services

**Eta 2U** Romania-based integrator

**Etalon Informatika** Hungarian IBM partner

**Gemini IT** Hungarian IT and services provider

**GreenNet** Georgia-based Cisco partner that also works with HPE and NetApp

**Hour Spol Ltd** Slovakian VAR with 70 staff

**Humansoft** Hungarian VAR with €44m top line

**Ibis Instruments** Serbian IBM partner

**ICL** Russian VAR

**ICZ** Based in Prague and specialises in the public sector

**In Line Technologies** Russian channel player

**Innoware** Ukrainian ERP specialist

**ITCE** Bulgarian Microsoft house

**K2 Atmitec** Czech software firm

**Kodeks** Croatian Cisco partner

**Lirex** Bulgarian Microsoft, Cisco, HPE, and Oracle partner

**Logic Computer** Romanian Dell partner

**Megatrend** Zagreb-based IBM and HP partner

**Microcomp** Slovakian IT house with 25 years' experience

**Netcube** Russian Cisco partner

**Networksys** Cisco, VMware, Dell, and NetApp partner based in the Czech Republic

**Nvision** Russian company focused on enterprise IT projects

**Open Networks** Networking specialist

**Open Technologies** Russian reseller founded 23 years ago

**Paraflo** Bulgarian company with many vendor certifications

**Prime Solutions** Poznan-based IT house

**Q4Net** Cisco and VMware partner

**Santa Monica Networks** Estonia's only Cisco Gold partner, also works in Latvia

**Sedam IT** Croatian ISV and Cisco partner

**Senior Software** Romanian Microsoft partner

**Sevenet** Polish Cisco and Microsoft player

**Simac** Croatian IT house

**Sphinx IT** Romanian outsourcer founded in 1999

**Step Logic** Russian Cisco Gold and Master partner

**Storm Group** Croatian SI with two decades' experience

**System Plus** HP, Dell, and Microsoft partner from Romania

**Tegrus** Russian Cisco house

**Telelink** Bulgarian infrastructure, security, and integration firm

**Trecom** Polish Cisco channel player

**TS Europe** IBM partner across several CEE countries

# DACH

## The Elite

It may contain just three countries, but this region is not only the one that many vendors would love to break into more than any other in Europe, but also perhaps the hardest market to crack.

With Europe's biggest national economy and second-biggest population, Germany naturally dominates the IT industry of the DACH region and, indeed, of mainland Europe as a whole. This, coupled with its central location, makes it an obvious initial target for many vendors heading for Europe, as well as a core expansion play for resellers from other parts of the continent. Not least because two of its neighbours, Austria and Switzerland – each of which is a significant market in its own right – speaks the German language. But making a success of operating in Germany is not simply a matter of employing a few people in Berlin or Munich and hoping for the best. One of the first things you may notice about the German channel, and, to a large extent, its counterparts in the other DACH countries, is how many locations even fairly small VARs have.

The DACH economy is built around – and hugely proud of – its famed *mittelstand* of small and medium-sized businesses. And the term is not just a quantitative definition; it also implies a culture of family ownership, and a strong connection to the local region that often extends to their choice of IT supplier. Which is one reason why it is not uncommon to find German resellers – themselves often part of the *mittelstand* – with offices in 10 cities or more nationwide. Likewise, many Austrian and Swiss IT providers will have multiple locations in conurbations the length and breadth of their home country.

Anecdotal evidence suggests that the desire to keep things local also affects the adoption of hosting and cloud, with the IT industry in Germany still showing a much greater level of on-premise business than other western European countries – in particular the UK.

But with its history of neutrality, business-friendly laws, multiple native languages, and a non-EU status that means it is not affected by transatlantic agreements such as Safe Harbour and Privacy Shield, Switzerland has become something of a hosting hotbed, with a number of small, specialised datacentre operators – several of which are profiled here – based in the country.

Whichever way you look at it, the DACH market is at the very heart of the European channel, and seems set to stay there for a long while yet.

### adesso

This VAR and services house operates from 15 locations covering the length and breadth of Germany, as well as having offices in Vienna, Bern, and Zurich. It also has outposts in London, Istanbul, and a US office in Boston. The group employs in excess of 2,100 staff and turned over €260.4m in 2016. Adesso has a number of dedicated companies in areas including hosting, consultancy, mobility, and the insurance market, for which it has developed its own software.

### all for one STEEB

The strapline for this company says it all: “das SAP haus”. The firm, which is headquartered close to Stuttgart, prides itself on being the leading provider of local hero SAP's technology and services in the DACH region. It is also a founder member of United VARs, a co-operative global network of SAP's foremost partners around the globe. All For One Steeb operates in 13 cities in Germany and three in Austria, and also has offices in Switzerland, Belgium, Luxembourg, and Turkey. In its 2016 fiscal year sales rose 10 per cent to €266.3m.

### ALLGEIER

Based in Munich, this industry heavyweight offers a wide range of services, including system integration, software development, nearshoring services, consulting, and the provision of freelance technical staff. It operates across four trading brands: IT solution provider Allgeier Enterprise Services; staffing business Allgeier Experts; DevOps specialist MGM Technology Partners; and services player Nagarro. The company has a total of 6,500 full-time employees, in addition to 1,300 associated freelancers. In 2016 sales jumped by more than €50m on the previous year to €497.5m.

### ALPIQ

This €5.5bn-plus-turnover giant may be better known for its energy business, but across its vast and diversified empire are a number of entities focused on providing enterprise-grade technology. The Alpiq E-Mobility brand is focused on selling, installing, and maintaining a wide range of mobile connected items, while the company's InTec operation specialises in building technology and facility management. Elsewhere, Alpiq runs a number of power centres, and it also trades in energy commodities.

### Amaris

With a total of 3,500 employees across 65 offices in 50 countries worldwide, Amaris is one of the world's biggest consultancy specialists. The Geneva-headquartered firm – which was founded just 10 years ago – is forecasting that its sales will swell to €180m this year. The firm offers clients a range of different delivery models, including consultancy, offshore services, and project fulfilment that can be delivered in a packaged or bespoke way.

### artmotion

This Switzerland-based data hoster and managed services provider prides itself on offering customers the “highest level of privacy”. The privately owned company was established in 2000 and runs a main and a backup datacentre in Zurich, but claims that four fifths of its clients are from outside its home country, with customers spread across 30 nations around the globe. Artmotion claims that Switzerland's tax and privacy regulations – and its two-century-long

record of neutrality — makes it a perfect country in which to host data.



A true European powerhouse, Bechtle is one of the world's biggest VARs. Headquartered in the small city of Neckarsulm, between Frankfurt and Stuttgart, it is a giant of the DACH market, with more than 60 local 'system houses' spread across the region. But its reach stretches far beyond that, and it derives about a third of its sales from abroad, with operations in 11 further European countries: France; Italy; Belgium; the Netherlands; Portugal; Spain; the UK; Ireland; Hungary, the Czech Republic; and Poland. In 2016 the company grew revenues 9.3 per cent to a total of €3.09bn, and its stated goal is to grow its top line past the €5bn mark by 2020. During that time the business will also embark on a hiring spree, with headcount predicted to rise from 7,667 to 10,000. In recent years the firm has instigated its Global IT Alliance programme, in which it works with a range of other major resellers across the globe.

## CANCOM

This Munich-headquartered integrator, MSP, and cloud provider reached its 25th birthday this year, at the same time as its top line nudged past the €1bn mark — providing cause for a double celebration. The firm was founded as an Apple specialist, but now works with a wide range of infrastructure and client vendors, as well as security, enterprise software, and emerging areas such as IoT and analytics. The firm has boosted its business with some significant acquisitions in the last couple of years, including the November 2015 deal for Xerabit, one of IBM's top German partners, and the buyout last summer of Systemax's German operations.

## COMLINEAG

With 10 offices across the country and revenues in excess of €85m, this Hamburg-based VAR is a significant player in the German market. The firm has expanded beyond its reseller roots in recent years, including a greater focus on its consultancy and services operations, the creation of a software development business, and the opening of datacentre facilities in Berlin and Frankfurt. Comline cites Cisco, Citrix, Dell EMC, HPE, Microsoft, NetApp, Oracle, SAP, and VMware as its major vendor partners.



Known primarily as a licensing and software asset management specialist, this Leipzig-headquartered firm also provides a range of cloud and consultancy services. With offices in 25 countries in Europe — as well as a further 12 across Asia, Africa, and the Americas — Comparex can count itself among the global channel's very biggest players. Its FY16 revenue reached €1.91bn, and its near-2,500 staff are located across about 80 offices worldwide. In recent years it has made a range of acquisitions to expand its global reach and, since 2014, it has bought companies in the US, Mexico, Brazil, Turkey, Korea, and Thailand.



Headquartered close to Frankfurt, this networking,

communications, and security specialist claims to be "one of Germany's leading independent systems integrators and managed service providers". The firm runs 11 locations across its home country as well as three in Austria, and a Swiss base in Zurich. The firm has been in business for 37 years, works with upwards of 50 vendors, and employs more than 600 people. Revenue in its 2015 fiscal year rose 22.5 per cent annually to €170.25m.



This company focuses on helping businesses get the most out of big data and analytics. It provides a range of technology from partners IBM and SAP, as well as high-end consultancy. Like many companies on this list, the firm has a large number of DACH locations — particularly in Germany, where it has 14 offices in 12 cities, in addition to two in Switzerland and one in the Austrian capital Vienna. It also has a UK hub in Cardiff, and a US location in Tampa, and employs a total of 550 people.

## DAMOVO

Headquartered in Dusseldorf, this comms and networking integrator has offices in each of the DACH and Benelux countries, as well as Ireland and Poland. In 2015 the firm was acquired by private equity shop Oakley Capital and UK telecoms entrepreneur Matthew Riley, with Damovo's stated intention since then being to grow into a €150m-plus turnover European entity via a buy-and-build strategy. The company is already well on the way there, following buyouts of the comms business of Luxembourgian player CTTL, and a deal for German Cisco specialist Netfarmers. Other recent investments include the launch of its Aquila cloud aggregation platform. Avaya, Cisco, Microsoft, and Mitel represent the VAR's strategic partners.



With a total of 1,700 employees spread across 40 locations in Germany, this company is one of the German MSP market's biggest fish. The firm's core brand is its own CORBOX range of outsourcing services, but it also provides a range of consultancy offerings and software development services, as well as technology including mobile solutions, the internet of things, and SAP platforms. In November the company completed its planned switch from an aktiengesellschaft (AG) to a societ  europ e (SE) — a registration category available to publicly held firms compliant with EU corporate law. Revenues in FY16 jumped 11 per cent to almost €175m.

## ELCA

Celebrating its 50th anniversary next year, this Swiss company aims to offer customers "a single source for the complete spectrum of IT services", including consulting, systems integration, software engineering, and vertical and horizontal solutions. The firm has 800 employees, most of whom it claims are highly technically proficient IT graduates. ELCA is headquartered in Lausanne, and also runs offices in Geneva, Bern, and Zurich, as well as outposts in Madrid, Paris, and Ho Chi Minh City. In 2016 the company turned over €108.5m.



This Swiss player prides itself on being one of the country's leading providers of IT for SMBs. The Oftringen-based company has been in operation for 29 years and, in addition to its

business providing SAP-based ERP platforms, also runs two of its own datacentres. It also has accreditations with a range of other hardware and software vendors, including Dell EMC, HPE, Citrix, Microsoft, and VMware. The firm has 145 staff.



Huemer Data Center and Huemer IT Solutions are the two major channel brands operated by this Viennese company. Between them, the duo offer a range of managed and datacentre services, as well as infrastructure and security offerings. The business has been in operation since 2006, and it works with a wide range of big-name vendor partners including VMware, Cisco, Lenovo, Symantec, and Oracle.

## itelligence

With almost 5,700 staff and operations in 24 countries across Europe, Asia, and the Americas, this Bielefeld-headquartered firm is one of the globe's leading SAP channel players. It has a major presence in its home territory, with offices in 14 German cities, plus two in Switzerland and an Austrian base in Vienna. In 2016 the company grew its top line by 11.7 per cent on the prior year to €777.9m.

## ITRIS

This Spreitenbach-based firm is one of the biggest channel players to come out of Switzerland. The company, which employs 450 people, operates via seven trading entities in its home country, as well as another in Germany. The firm offers IT infrastructure, managed and cloud services, maintenance and support — which it claims it can provide for 40 per cent cheaper than the major vendors. The company has a particular focus on supplying technology to the medical sector.

## MATERNA

Information & Communications

Headquartered in Dortmund, this company has a focus on high-end services and software skills, employing a wide range of software developers and consultants among its 1,700 staff. The firm has been in business for 35 years, and in 2016 turned over €223m. Partners include HP, IBM, Microsoft, Oracle, and ServiceNow and the firm works across both the B2B and public sector.



This Nuremberg-based business has been in operation since 1994 and is still owned and run by co-founder Gerhard Reinhardt. In addition to its headquarters — where half of its employees work — the firm has a further five locations across Germany, employing an overall total of 380 people. The company offers a range of client and print management services, as well as licensing, mobility, security, storage and other offerings. Sales in 2016 came in at €136m.



NetApp and Cisco are this Swiss firm's major partners, and it prides itself on having garnered numerous awards and certifications — including Gold status — from the latter. The company has been in business since 1998 and employs 141 people across locations in Bern, Basel, and Winterthur, where it is headquartered. NetCloud offers a range of managed services, cloud offerings, and IT and communications infrastructure.

## NTT Security

This security channel heavyweight is using its geographic breadth to take a worldwide approach to helping its customers combat attacks, with the recent creation of a Global Threat Intelligence Centre. The company's roots are German, and its headquarters remain in Bavaria, but nowadays it has more than 20 offices across Europe, Asia, the US, and Australia. In FY16 its German operation turned over €85.2m.

## PROFI

Based in Darmstadt, this owner-managed VAR has developed a keen focus on emerging technology areas such as big data, cloud, social media, and "Industry 4.0". It also has a thriving security, mobility, and SAP business. The company employs 380 people across 15 German offices, and was founded in 1984. Its core partners include Cisco, Dell EMC, Nutanix, IBM, and Lenovo and in FY16 its turnover leapt 16.9 per cent year on year to €148.4m.

## retarus:

With sales of about €40m, this Munich-headquartered company may be among the smaller players featured here, but its global reach is testament to the power of the cloud. The firm specialises in cloud communications services, with a range of offerings covering email, telephony, fax, and SMS technologies. In addition to its home country, it has offices in 10 countries in Europe, Asia-Pacific and the US, and doubtless sells into many more via its partner programme. It also works with a number of technology partners, including IBM, Fujitsu, Microsoft, SAP, and HP.



Headquartered in Zurich and with an eastern outpost in Yverdon-les-Bains, this IT provider racks up 100 years in business in 2017. The company also has its own offices in Germany, the UK, and Australia, and partner organisations in Poland, Turkey, Korea, India, Canada, and Brazil. The business is divided into three sections, which focus on ICT solutions for government and enterprise; telematics technology for public transport environments; and BYOD, mobility, and data security offerings. It also sells technology and supplies online.



With a reported top line of more than €6bn, this Switzerland-headquartered firm is perhaps the world's largest specialist provider of licensing, software asset management, and other related services. The VAR employs about 3,000 people in 82 countries worldwide, and sells into upwards of 60 more. Two years ago rumours first emerged that the company was looking to recruit and grow strongly in support of a possible IPO in 2018. Later that year its expansion plans were boosted by a cash injection from global investment firm KKR, which now has a 25 per cent stake in SoftwareONE.



This Wiesbaden-based firm says it is "one of the leading system integrators in Germany in the field of datacentre infrastructure". This claim is lent weight by its 20-year history and a top line which grew by more than a fifth in 2015 to almost €300m. The company has more than 650 staff working



in 16 offices covering the whole of Germany. The company holds accreditations with vendors including IBM, NetApp, Cisco, Microsoft, HDS, and Fujitsu.



With its partnerships with the likes of ServiceNow and Salesforce, and its focus on DevOps environments, this Austrian company is at the forefront of some of the IT industry's biggest shifts. Its core product brand is its Tosca automated continuous testing platform, which it sells direct and through a partner programme which includes big-name global SIs such as Infosys and Accenture. In addition to its home country, Tricentis has offices in Germany, Switzerland, the UK, Poland, the Netherlands, the US, Australia, and India.



With its dedication to digital transformation, big data, IoT, and Industry 4.0, this IT house claims it is a leading integrator and consultancy across the DACH region, as well as Denmark. Headquartered north of Zurich, Trivadis focuses on partnerships with Microsoft and Oracle, as well as on open-source technologies. The company employs 650 people across 14 offices, and came into being in 1994 — at a meeting between friends at a motorway service station.

## T-Systems

A subsidiary of the former state-owned carrier Deutsche Telekom, systems integrator T-Systems is a global monolith in its own right. It employs a total of 47,800 people in offices spanning 20 countries worldwide, and turns over in excess of €7bn annually. It provides products and services to government and large enterprise customers, and also offers hosting services from a number of its own datacentres at various locations. It lists seven manufacturers as its key global partners: Akamai; Cisco; Huawei; Microsoft; Informatica; SAP; and VMware.



As it moves towards the 40th anniversary of its establishment

next year, this company can reflect on having become one of the Swiss market's foremost VARs. It currently employs 240 people across seven offices spread throughout the country. UMB claims to hold more than 1,000 manufacturer certifications from the likes of Cisco, Microsoft, Red Hat, VMware, Commvault, and Citrix. It also offers a range of managed, cloud, and hosted SAP services, as well as consulting.



This 17-year-old Swiss IT provider specialises across three areas: IT infrastructure; virtualisation; and VDI, in which it has developed its own offering, dubbed Dynamic Desktop. The firm has three offices in the country and EMC, VMware, and Cisco have long been strategically important partners. In the latter case uniQconsulting was an early proponent of the vendor's UCS server technology. In recent years it has also teamed up with the likes of RES Software, Huawei, and Pure Storage, and branched into areas such as software-defined datacentre.



With at least two offices in each of the DACH countries, this Austrian player has solid coverage of the region. The company focuses squarely on providing IT services to the healthcare sector, with offerings including infrastructure, software, and client services, as well as consulting and security 'health checks'. Xtention employs 220 people and has been in business for 16 years, and its core partners include Cisco, Citrix, HP, Oracle, Microsoft, and Symantec.



In 2001 this Swiss integrator's top line rose six per cent annually to almost €125m, making it a significant player in its domestic market. But the firm has ambitions way beyond that, and is in the process of setting up its first base in Asia, via the establishment of a Singaporean office. This comes in addition to its existing locations in Austria, Germany, Switzerland, and the UK, with expansion into the US a stated longer-term goal.



# Q&A: Dr Thomas Olemotz

*Chief executive, Bechtle*

## **What do you see as Bechtle's most important goals for the next two years?**

To maintain our strong growth trajectory and increasing market share, we will focus on attracting highly qualified employees across the board and growing key strategic businesses – such as cloud computing, mobility and security – while remaining profitable. And I believe we're in an excellent position to reach these goals.

## **You have stated your intention to grow sales from €3bn to €5bn by 2020 – what do you see as being major sources of growth?**

As in the past, our strategy is to rely on both organic growth and acquisitions. But we see acquisitions not only as a way to maximise revenue, but also as a means of expanding our regional presence judiciously and underpinning our portfolio with specialists in future-shaping areas.

## **Are there technologies that you anticipate as being high-growth areas in the next two years?**

Cloud business will be a staple throughout the corporate world, regardless of company size. Projects will involve more and more security solutions. And digitisation will increase in not only the manufacturing industry but the public sector as well. We're currently also following the developments of hyperconverged infrastructure with great interest.

## **What is your M&A strategy for the years ahead, and what do you look to gain from acquisitions?**

Interestingly, our M&A strategy hasn't changed since our first acquisition exactly 24 years ago. The purchase must either benefit our regional presence or reinforce our technical expertise. We assess all acquisition opportunities against strict business criteria, and we'd rather take a pass than pay a price we consider too high. It hurts sometimes, but we stand by this principle even after 70 acquisitions and it has served us well.

## **What is your strategy for your services business?**

Our services business relies on more than 100 decentralised yet tightly networked companies in the Bechtle Group. All of them employ service specialists whose expertise can be 'purchased' by other Bechtle firms. In addition to this, we have central units, primarily our managed services organisation with its 900 staff members, whose services are available to all group companies, but who also acquire their own customers.

## **What investments are you making in emerging technology areas such as big data, hyperconverged infrastructure, digital transformation and next-generation security?**

As an IT company, such topics interest us from both a user and systems-integrator perspective. Last year for example, we began relocating our datacentre to a new site featuring leading-edge technology. The investments involved are considerable, to be sure, but they're putting us in prime position to meet future requirements head-on.

## **What role will Bechtle play in helping customers move to the cloud?**

We position ourselves as a multi-cloud service provider. Many customers have already begun supplementing their traditional or private-cloud architecture with specific public-cloud services, resulting in different hybrid-cloud variations. Some are planning to go even further and obtain IT services exclusively from the public cloud. They're almost at the point of simply getting their IT from the mains outlet. Bechtle's response to this customer journey is to provide suitable cloud services for each stage and situation. Our datacentre produces clouds fully automatically, providing customers with the benefits of virtual private clouds, cloud brokerage, and our own value-added cloud services.

## **What role will the Bechtle Global IT Alliance play in your growth, and why was partnering with other organisations around the world the right model for you, rather than acquisition or organic expansion?**

Our Global IT Alliance is a valuable, forward-facing component of our international strategy. All its members are certified, and we share the same values and principles. Founding new companies wouldn't allow us to establish ourselves nearly as quickly, or with such vast global coverage or the requisite close vendor relationships. We now have an excellent blend of international Bechtle subsidiaries and partner companies facilitating premium support for multinational customers.

## **What is the key to remaining profitable, and has it become harder to maintain profitability simply through vendor rebates?**

The key is for us to keep our focus on the future, taking a long view in our business dealings and combining this with extensive experience and close customer and partner relationships.

## **What does Bechtle see as its key differentiators, and why do customers choose you over your competitors?**

No other company in our industry offers either similar regional proximity, or the same level of experience. We also have stronger, closer ties with customers and vendors than anyone else. Above all, no other employer gives its employees as much scope to take initiative and no one promotes entrepreneurial action as consistently as Bechtle.

**"We have stronger, closer ties with customers and vendors than anyone else. Above all, no other employer gives its employees as much scope to take initiative and no one promotes entrepreneurial action as consistently as Bechtle"**

# Ones to Watch

## ■ Abraxas

Headquartered in Germany, this public sector IT specialist, which also operates in the enterprise space, has significant operations in Switzerland. The company has 500 employees and has a track record of M&A.

## ■ Advanced Unibyte

This Metzingen-headquartered system house turns over €45m and provides customers with infrastructure, storage, and cloud and managed services. Its partners include NetApp, Cisco, VMware, and Riverbed.

## ■ Anyweb

Based in Zurich, this company offers its own router, gateway, tracker, and IT management platform products, as well as working with vendors including Cisco, HPE, and Palo Alto. The firm has been in business since 1994.

## ■ Bedag

Some five per cent of this Swiss company's 400 staff are apprentices. The firm, which turns over more than €90m, offers a range of IT products and services, and also runs its own datacentres.

## ■ Belsoft

This Zurich-based firm has two separate and autonomous arms: one that specialises in communication and collaboration technologies, and the other in IT infrastructure. The company has been in business for 29 years.

## ■ CEMA

This VAR and IT services house has 10 offices, plus a service centre, across Germany, employing 207 people. The company holds certifications including Dell EMC Titanium and Sophos Platinum status, and has sales of about €61m.

## ■ CityComp

This third-party services provider passes 30 years in business next year. The company has moved on from simple hardware maintenance and into areas such as deployment services, and now styles itself as a complete IT services provider.

## ■ Data Technology

Headquartered in Austria, with a further location in Germany, this company specialises in analytics. The firm also offers consulting, database solutions, and software development.

## ■ DBI Services

The firm has been in operation for just seven years, but is already a well-respected national player in the Swiss market for Oracle, Microsoft, Documentum, and open source technologies. The company has 45 staff and revenue of more than €5m.

## ■ Econis

Based in Switzerland and with its own datacentre, this company also counts IBM, Cisco, VMware, NetApp, Fortinet, and Microsoft as its key partners. The firm was founded in 1997.

## ■ Esentica

This company trades through three brands, including banking

and automotive specialised technology providers, as well as a more generalist integrator. The firm employs 250 people and is based in the Swiss town of Altstätten.

## ■ Infotech

This Austrian VAR works with HP, HPE, Microsoft, Cisco, and Apple, among others. Its business is divided into three operating units, covering IT services, datacentre and cloud services, and network and connectivity offerings.

## ■ Kumavision

Based in the town of Markdorf, this German VAR specialises in ERP, CRM, business intelligence, and cloud. It has a particular focus on Microsoft's Dynamics technology, and sells primarily into the mid-market.

## ■ Lake Solutions

Passing its 20th birthday next year, this Swiss IT VAR operates from offices in Wallisellen and Zurich. It employs 50 people, and partners include VMware, HPE, Microsoft, and IBM.

## ■ MIT Group

It may be based in a small town in Switzerland, but this ICT services outfit has a global focus, and pledges to "follow customers wherever they are going". It has three clearly defined pillars of its business: cloud innovation; engineering; and coaching.

## ■ Navax

This Viennese VAR concentrates squarely on the software sector, and works with a range of vendors. It provides ERP, CRM, analytics, and mobility-focused products to customers across the DACH region.

## ■ NTS

Another Austrian outfit, whose name stands for Netzwerk Telekom Service, this company turns over €80m and employs 200 people. The infrastructure, security, and virtualisation VAR has seven offices in its home country, plus locations in Germany and Italy.

## ■ Resin

Infrastructure and cloud, document solutions, and services are the three focus areas for this German company, which runs from three offices in Freiburg, Waldshut, and a head office in Binzen. Aerohive, HPE, VMware, Veritas, and Microsoft are among its major vendor partners.

## ■ SanData

Focusing on large enterprises and the mid-market, this VAR has 12 locations across the DACH region and 330 staff. Sales for 2016 came in at €73m, and partners include HPE, Dell EMC, IBM, and Fujitsu.

## ■ Tech Soft

This 26-year-old Linux specialist helps migrate customers from legacy HP UNIX technology to Red Hat environments. Based in Berlin, the company also provides training, consultancy, and repair services.

## ■ UC Point

Headquartered in Lucerne, this company pledges that "we live

and breathe Skype for Business". The firm also has offices in Zurich and Cologne, as well as two US locations in California and Florida, and a Latin American HQ in Mexico City.

### ■ **Wagner AG**

Specialising in outsourcing, this company has four offices in Switzerland and works with customers across the country. The firm also offers consultancy and project deployment services, and works with partners including IBM, Microsoft, and HPE.

### ■ **WIRD**

Providing infrastructure, cloud, security, managed services, and consulting, this Swiss integrator celebrates two decades in business this year. IBM, Cisco, NetApp, Oracle and Tintri are

among its major partners.

### ■ **Xantaro**

Half of this VAR and services firm's 120 staff are certified technology professionals, with a further 60 freelancers extending the capabilities of its technical team. The 10-year-old company has five offices in Germany as well as a UK office which was established in 2010.

### ■ **Yaevon**

This Microsoft ERP specialist has four sites in Switzerland and two in Germany. The company already has 300 customers and more than 200 staff, despite still being a year short of its 10th birthday.





# Best of the Rest

**3T Technology Transfer and Training** Swiss Microsoft house

**ABAX** Austrian infrastructure, security, and telephony provider

**Ace** Offers software and hardware integration and application development

**AceTune** Swiss provider of consulting and engineering services

**ACP** Specialises in hybrid IT

**Allba** IBM partner working with big data, analytics, and mobile

**Antauris** Hamburg-based systemhaus and services provider

**Artaker Computersysteme** Employs 40 specialised consultants

**Ategra** Swiss software specialist

**Avodaq** IT infrastructure and comms player

**Bacher Systems** Austrian provider of security and datacentre technology

**Base-IT** IBM, Cisco, Microsoft, and Citrix partner

**Bat Groupware** Viennese ISV

**BI Plus** IBM Gold partner in the Austrian capital

**Bison IT Services** Employs 200 people across four Swiss offices

**BIT Studio** IT and comms VAR with 30 years' experience

**BlueStone Consulting Group** HPE, VMware, Fortinet, and Nutanix partner

**Boss Info** Specialises in Microsoft Dynamics

**Bristol Group** Providing IT security solutions for 25 years

**Bucher + Suter** Focuses on Cisco contact centre technology

**Business IT** Swiss HP, Red Hat, Oracle and Veeam partner

**BWO** Operating in Switzerland for 26 years

**CCP Software** Provides software and services

**Ceruno** Managed services and IoT player

**Circon Group** Microsoft Dynamics firm with offices across Switzerland

**Circular Informationssysteme** Networking and infrastructure VAR from Stuttgart

**Cisel** Specialist circuit board manufacturer

**Clue** Swiss security services operator

**Concat** Support and managed services player

**Conet Group** SAP partner that also provides hardware and software infrastructure

**Consultix** Web developer and consulting firm

**Cross-Works** Cloud storage and software company

**DANES IT Services** Provider of datacentre technology and outsourcing services

**DCCS** Digitalisation firm with 150 employees

**Dyna BCS** Offers managed services and backup

**EDV2000** VAR reaching its 25th birthday this year

**Entec** Cloud, services, and infrastructure company

**e-tec** Provides components and accessories

**Eworx** Austrian professional services firm

**Global IT** Sells and implements computing, and also develops custom solutions

**Ibitech** Develops, sells, and supports software environments

**iFAS** Education-focused software provider

**Infoniqua** Swiss systems integrator with 70 staff

**Informatio** Specialises in storage and related services

**InfraSupport** IBM Cognos specialist from Winterthur

**Inginia** Swiss partner of Dell EMC, Cisco, VMware and others

**Interact Consulting** Document specialist founded in 1991

**ITConcepts** Wolfsburg-based ISV and software VAR

**ITdesign** Austrian services firm with a focus on security, mobility, and cloud

**ITpoint** Consulting, engineering, and managed services player

**IT-HAUS** Sells IT products from more than 80 manufacturers

**ITPro** Austrian consulting and software provider

**ITSC** German firm specialising in IT for health insurers

**Klein Computer System** Provides managed services and products from the likes of HPE and Cisco

**Lettner EDV-Technik** Oracle and HP partner

**Leuchter IT Solutions** Almost 60 years in business

**Levantis** Networking, security, and services house

**Litecom** Cisco Master Service Provider partner

**Medialine** Selling into the SMB space for more than 15 years

**MindSync** Software and consultancy provider in Austria

**Morgenstern** Printing and services VAR

**MP2 IT Solutions** Three offices across Austria

**NetUSE** Top-level Check Point partner

**NIPCON** Offers IT systems, print, and comms technology

**Pitagora** VMware partner with two Austrian locations

**PM Factory** Personnel and outsourcing specialist

**PrimeForce Consulting** Enterprise content management consultancy

**QbiQ** Offers life cycle services and software engineering

**Quality Now** Swiss HPE-focused integrator

**R. Bucker** IT security VAR of 30 years' standing

**Rodlauer Computer** Cisco, Oracle, HP, and RSA partner

**r-Tec IT Security** Offers security-focused products, analytics, and consulting

**Scaltel** Datacentre, security, collaboration, and networking reseller

**Schrittmacher** Austrian networking consultancy

**Semizen** ITSM and life cycle player from Vienna

**Serima** IBM partner with offices in Hamburg and Zug

**SHD** Software and hardware VAR founded in 1983

**Sievers Group** Osnabruck-based firm offering security, comms, and infrastructure

**SmartWave** Swiss VAR and software developer

**SNS Saturn Networking Solutions** Networks specialist based in Upper Austria

**Solvistas** Big data and software firm

**Sowre** IBM VAR and SI based in Switzerland

**Starke + Reichert** Offers a wide range of IT and office equipment

**SYSback** Security, managed services, cloud, and consultancy player

**Urano** Offers infrastructure and services and also sells IT products online

**Wallak Informatics** Works with partners including Fortinet, Lenovo, Dell EMC and VMware

**WebGate** Specialist in digitalisation, mobility and enterprise content management

# A European union?

**Sam Trendall** asks if there is such a thing as the European channel and, if so, how vendors should go about serving it

It is thought that the word 'Europe' was first used to identify a geographical area sometime in the seventh century BC. In the 2,700 years or more since then, the term has remained ever malleable, often ill defined, and invariably enigmatic.

Looking at a map of modern-day Europe, it is not hard to appreciate why. Covering 6.8 per cent of the Earth's landmass, the continent is only a little bigger than Australasia, which takes up 5.9 per cent, with both far, far smaller than North America, South America, Africa, or Asia. But with a total of almost 750 million inhabitants, Europe has an estimated 11 per cent of the world's population — compared with just 0.4 per cent in Australasia. Europe's population density is more than three times that of either of the American continents, and more than double that of Africa.

Europe also has a similar number of countries to Africa — although, unsurprisingly, no one can quite agree on exactly how many nations qualify as European — but crammed into a landmass less than a third of the size. The Americas cover, between them, about three tenths of the planet's landmass, divided between 21 countries — less than half the number in Europe. Even Asia, the world's biggest and most densely populated continent, which accounts for 29.5 per cent of all the world's land, has about the same number of countries as Europe.

And, let us not forget, that the 44 — or possibly 49, 50, or 51 — states that form present-day Europe have been forged from centuries of conflict, formerly played out on battlefields and in palaces, now conducted in parliaments and, increasingly, online. With so many borders forever shifting to reshape and divide such a comparatively small piece of turf into different jurisdictions and cultures, it is surely inevitable that Europe, and Europeans, often struggle to define a cogent and coherent identity, or set of shared values and characteristics.

Likewise, as much as vendors prefer to divide their business into big, easy-to-identify chunks — typically The Americas, Asia-Pacific, and EMEA — it is much harder to label each of those with any broad defining traits or trends.

David La Rose, vice president of global business partners at IBM Europe, agrees that "with 44 countries across Europe, there is no such thing as a true, single European channel".

"The European channel is characterised by a high level of fragmentation due to the 44-country heritage, leading to a mix of a highly condensed market of a few pan-European players and a very large, long tail of smaller more local-

oriented players," he added. "From this perspective, Europe is significantly different and more complex than some other geos, although that diversity, of course, brings benefits and challenges."

When asked if there is such a thing as 'the European channel', Fadi Moubarak, Avaya's vice president for channel for EMEA and APAC, said "obviously not".

"The diverse market sizes, language and regulatory differences between countries are all major factors," he explained. "It's true that, overall, trade rules are regulated in a synchronised manner. The differences that do exist, however, definitely impact how vendors and partners interact and execute their [go-to-market] strategies."

But Carlo Giorgi, HPE's vice president of EMEA channel, states that "in theory there is a 'European channel', formed from related trends and patterns".

"However, timing and adoption of the coherent trends and patterns differ depending on [the] maturity of the geographical location," he added. "Primarily, we see our customers' needs leading us to drive multi-country strategies in EMEA; when customers are wanting to cross borders and follow the trend towards globalisation, we can no longer think locally, but instead work sub-regionally, regionally, and also globally."

Jakob Olsen, EMEA managing director at Acronis, believes that "the European channel is as diverse as the European countries".

"However, one could argue that the European channel is SMB-focused with a high number of smaller resellers, servicing their local area," he added.

Of course, vendors want to work with partners that offer them a breadth of access to multiple national markets. But Gilles Pommier, vice president of EMEA channel at Veeam, claimed that, even when working with pan-European players, it behoves manufacturers

to tailor their activities to each individual country.

"From our perspective, you cannot group European countries into a collective based on trends or patterns," he said.

"There are too many unique considerations that distinguish each country and even regionally within those countries. Of course there are some multinational resellers that span all of Europe, but within those businesses things are done to adapt to each country. In the current landscape it is difficult to apply a global way of doing things."

But perhaps there are some



things that unite not just Europe, but large parts of the rest of the world as well. Justine Cross, co-founder of channel programme and reseller-recruitment specialist EMEA Channels, believes that “there is an absolute differentiator between the US and the rest of the world; this, to me, is the biggest distinction globally”.

“The European market, predominantly, can be handled with a single channel strategy and typically is aligned with trends and patterns,” she added.

### Technical skills

Cross elaborates that one of the most noticeable differences

between VARs on either side of the Atlantic is that European channel players show a greater level of independence — partly as a result of being at least 3,000 miles from many of their vendor partners and, in most cases, speaking a different language.

“The European channel in my experience is far more geared up technically than the US,” she said. “They tend to offer more services and be less reliant on the vendor for sales, services and implementations. The obvious reason for their self-sufficiency is as basic as language. Not many US vendors... when they enter the [European] market offer services, and support, and even sales, in multiple languages. This means the distributor and/or resellers need to represent the vendor and to do this professionally they will need to skill up to a deeper level.”

Alex Raistrick, director of western Europe at cloud data management vendor Rubrik, endorses the suggestion that European VARs typically possess a higher level of engineering skill and value-add.

“One common theme across EMEA partners versus those in the US, for example, is that European resellers tend to deliver much more value. They are not simply transactional in nature,” he said.

Many technology manufacturers arrive in Europe from the US or Asia, so the need to adapt their strategy is immediate and obvious. But formulating a consistent plan for a region as diverse and heterogeneous as Europe is a tall order.

“The US is one large, homogeneous market, where trade barriers are low, while in APAC trade rules vary widely. In the EU, you get a combination of both,” said Avaya’s Moubarak.

Olsen from Acronis claimed that new arrivals in Europe must make sure they recruit local specialist staff if they want to be a hit with channel players — even those with which they may already work in other geographies.

“The geographic complexity and the high number of resellers requires a local-to-local approach in most countries,” he said. “Even larger resellers with multi-country presence require vendors to interact with local sales to drive the pipeline and close deals.

“The single biggest mistake is to address the European market as one country. Plus addressing the European market



with campaigns that are suited for their home market.”

IBM’s La Rose agrees that many vendors landing in Europe fail to adequately adapt to their new surroundings. He claims that the chief mistake they make is to “engage everybody the same way — and in English — not acknowledging local market dynamics such as business and country cultures, language nuances, and relationship heritages”.

Although European VARs may be necessarily more self-reliant than those in the US, that does not mean they do not appreciate — and, in some cases, require —

a little hand-holding from new vendor partners, according to Rubrik’s western European boss Raistrick.

“One common mistake that North American and Asian vendors make when first addressing the European market is expecting the partners to deliver business alone. You can’t just sign partners, train them and then disappear, waiting for purchase orders to land,” he said. “Partners need nurturing just as end users do. One of my old colleagues used to describe this method as seagull selling — fly in, dump, and fly off. It doesn’t tend to work very well.”

### Strategic decisions

Even if a vendor dedicates itself to coming up with 50 strategies to address 50 different markets, the geography of Europe is still wont to create potential conflict and complication. There are numerous locations in Europe where it is entirely plausible that a reseller close to two or more national borders could be making several points less margin than a peer just a few miles away in another country — but several points more than another competitor a few miles away in another direction.

These days most major vendors have, to some extent, implemented a global channel scheme to provide a degree of uniformity across the world. But regional, territorial, and national channel and sales leaders must still retain some degree of control over tactics and initiatives.

EMEA Channels founder Cross believes that a single channel framework can address the whole continent, but counsels that marketing activities must be tailored for each nation and locality.

“A fantastic marketing initiative in Italy could fail drastically in Sweden,” she said.

IBM’s global partner chief La Rose argues that, while a strategy can be conceptualised at a global level, implementing it should be the domain of experts on the ground in individual areas.

“Strategy and programmes can and should be defined centrally to ensure cohesion, consistency and synergy,” he said. “Execution should preferably be done with a local mindset — however, that does not always equal local



resourcing. Local execution can be done from hubs. It's important to maintain the right mix of programmes to support different types of partner."

HPE's EMEA channel chief Giorgi agrees that worldwide plans married to local action is the ideal mix.

"We see channel partners looking for consistency in strategy and approach between countries," he said. "The HPE Partner Ready Programme strategy is consistent globally and we have also listened to our partners and their localised requirements to help us build a balance between a global programme with regional and local specificities in its implementation."

Getting channel partners to team up and work with each other has long been something of a holy grail for vendors. And nowhere more so than in Europe, where it may require scores of resellers just to ensure the presence of one partner in each country.

VAR-to-VAR collaboration is a concept that has long been eyed by the channel with a degree of suspicion, for various reasons. But it seems that customer demand for consistent service provision and ease of engagement across different geographies is prompting an increasing number of channel firms to explore the possibility of working with a peer in another geography.

Vendors would seem to be ideally placed to facilitate such co-operation, and Michael Achtelik, EMEA senior director of partners and alliances at Informatica, claimed that manufacturers ought to promote the concept among their reseller base.

He said: "For customers with global reach or running international projects, it's important to champion relationships between partners across other countries, and this requires a close engagement between vendors and resellers, especially in the sales environment or when implementing a new solution."

Benjamin de Waal, global partner marketing manager at RES, believes that vendors "are uniquely positioned to spot channel superstars who could add value to a deal elsewhere".

"The most obvious way for vendors to take advantage of this is to recognise which of their international partners wants to branch out into new markets and make introductions," he said. "This turns them into a broker and not only has earning potential, but solidifies relationships and expands their European network."

### Laboured union

But while end users, vendors, and resellers might be fostering a more international outlook, the geopolitical climate continues to be pockmarked by insularity, parochialism, and division. Parties and movements espousing anti-European sentiment have risen to prominence in numerous countries across the continent, nowhere more so than in the UK which, in 2019, will become the first country ever to leave the EU. But Justine Cross of EMEA Channels asserts that, even post-Brexit, the UK will retain its status as vendors' preferred beachhead for pan-European expansion.

"I still believe [that] because of language, skills, tax, low-cost flights to everywhere and, in particular, employment laws, the UK will be the first foothold

into Europe," she explained. "I am not blind to [the fact that] there are potential threats from other regions... I would see, perhaps, Dublin being a potential new threat. But, overall, because of the reasons [above], the UK will still survive, thrive, and be the start of the path into Europe for many vendors."

John Andrews, EMEA channel director at Centrify, claimed that businesses in the UK — and even those yet to move to the country — might actually be able to turn Brexit to their favour.

"It will probably present a strong point of negotiation for all businesses in the UK and Europe that either want to secure strong deals to stay or even to move and invest in the UK," he explained.

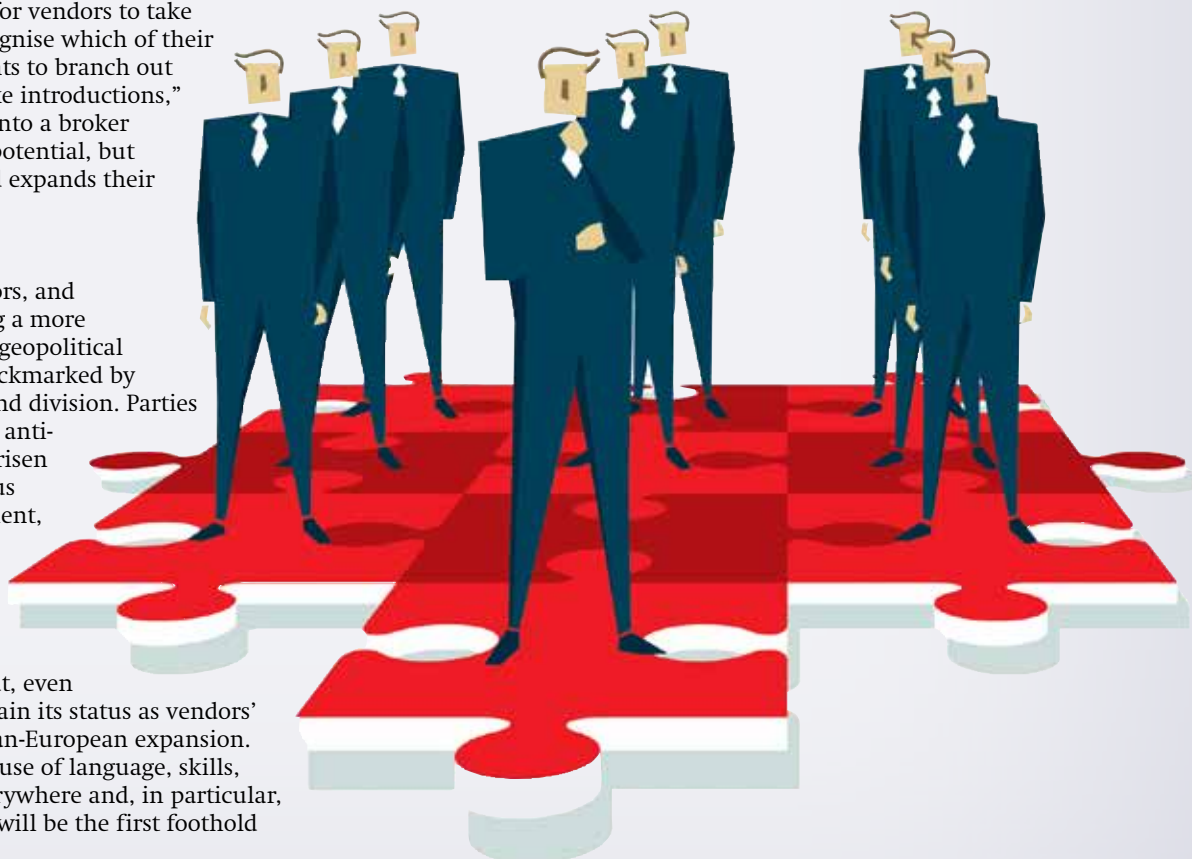
Olsen of Acronis cautions that it is too early to comment definitively, but believes that other cities may become more attractive to vendors if the UK's departure from the EU makes it a harsher place in which to do business.

"If Brexit makes it more difficult to work in Europe based in the UK, most likely Switzerland — Geneva and Zurich — Munich, Amsterdam, and Copenhagen would benefit," he said.


RES' partner marketing chief de Waal went further, claiming that the most business-friendly cities in mainland Europe are already beginning to prosper as a result of Brexit.

"There has been a steep increase in EMEA headquarters openings in cities other than London," he said. "Amsterdam, Paris, and Stockholm are all proving popular hubs. In some cases, cities are making deliberate moves to entice software vendors to set up shop in their capitals, with the promise of better local infrastructure, affordable housing, accessible schools and a higher level of education than the London metropolitan area can provide."

After almost three millennia of rivalry, it is no surprise that the grand cities of Europe continue to compete, rather than collaborate. Do not be surprised if they are still tussling in the year 5000 — just don't expect anyone in the IT industry or elsewhere to work out what exactly 'Europe' is by then.







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# FRANCE & SOUTHERN EUROPE

## The Elite

This – admittedly somewhat loosely defined – region is perhaps the most significant hotbed of IT channel activity featured in this report, providing some 52 members of our Elite, a little over one in four of the total.

France could have merited being a region in its own right. A substantial number of the companies profiled here hail from western Europe's biggest country. What is more, the nation has a real knack for creating huge IT services and system integration powerhouses. The likes of Atos, Capgemini, Sopra Steria, and SPIE can rival the global clout and scale of anything the Americas or Asia has to offer.

And below these leviathans is another tier of major players – such as Akka Technologies, Alten, and GFI Informatique – each with thousands of highly qualified staff and revenues of hundreds of millions of euros. Sharing a land border with three nations that have French as an official language is surely a boon for ambitious France-based companies with a yen for international expansion.

To the southwest, the Iberian peninsula – in particular Spain – also has a strong services culture and has spawned a couple of big consultancies. Portugal is a much smaller nation, the per-capita GDP of which is more than a quarter smaller than its only neighbouring country. But the nation, particularly its capital city Lisbon, has created a number of innovative ISVs and exciting emerging tech players.

Appropriately enough for a country famously shaped like a boot, Italy, and its technology industry, is out a limb somewhat. The nation's IT channel has cultivated a number of big VARs, with meaty top lines and numerous offices nationwide. But most are just, at best, national players.

Greece has had more than its share of economic troubles over the last decade, and it would be disingenuous to pretend that this has had no impact on its IT resellers and MSPs. Examining the fortunes of the handful of Greek players profiled here confirms that, for the country's IT channel, growth has been hard to come by in recent years.

However, many resilient players have weathered the storm and managed to maintain sales, with some – as you will see in our one-on-one interview on p35 – now targeting growth via overseas expansion. Greece's proximity to the emerging markets of Albania, Bulgaria, and the former Yugoslav countries offers an array of potential new hunting ground.

In the far south of the area under our examination, the small island nations of Cyprus and Malta have a combined population of little more than 1.5 million – roughly the same as Florence, the sixth-largest city in Italy. So it is no surprise that the two countries have not provided a vast number of our Elite firms. But each does have its own, well-established IT market, with successful local players.



With four offices, this 30-year-old VAR is a significant player in northern Italy, particularly the South Tyrol region where the country meets Austria. The firm has a particular focus on the two halves of the former HP business, holding Platinum

partner status with both HPE and HP Inc. Other core vendors include Microsoft, VMware, Citrix, Oracle and Veeam. ACS has 220 staff serving 2,200 customers, and turns over €26m.



With a total of 1,400 accredited engineering staff, this company styles itself as the leading provider of installation and maintenance services in France. It also works in a further 22 countries across Europe, and claims to have connected one million objects for its customers over the last three years. The firm works with telecoms operators deploying fibre-optic infrastructure, as well as network and security hardware.



Employing more than 13,000 people and with annual sales in excess of €1.1bn, this France-headquartered company is one of the world's leading players in the fields of technology and engineering consulting. The business has offices across Europe, Africa, Asia, and the Americas, including 21 dedicated 'centres of excellence'. Akka claims to offer services covering the entire product life cycle, for a range of industrial projects.



With a total of 21,300 engineers employed across 20 countries, this French company has one of the biggest workforces of any firm on this list. The large majority – 77 per cent – of its business is drawn from engineering and technology consulting activities, with eight per cent derived from the creation and deployment of bespoke IT infrastructures. The remaining 15 per cent comes from designing network and telecoms architecture. In 2016 the company turned over €1.5bn, about half of which was generated outside France.



In business for 40 years, this French heavyweight focuses on digital transformation and other emerging tech areas. Its key verticals are defined as banking and insurance, healthcare and the public sector, industrial engineering, and the automotive industry. The company has 22 locations in France and Belgium, as well as outposts in Switzerland, Germany, and the UK. It employs about 2,300 people and turns over €152m.



Most readers of this report will need little introduction to this Franco-German IT services goliath. The firm styles itself as "the European number one in big data, cybersecurity, high-performance computing, and digital workplace" – an assessment with which it is hard to disagree. With 100,000 employees, the company is the size of a city, and its €12bn turnover is equivalent to that of a small country's GDP. Atos has locations in 70 countries and in recent years has made major acquisitions including system builder and services house Bull, and comms vendor Unify.



Headquartered in Madrid, this 1,000-strong IT player also operates in five other cities across Spain, and specialises in digital transformation, IT infrastructure services, systems integration, cloud, and big data and analytics. It works across a number of private sector verticals including banking, insurance, retail, telecoms, media, utilities, and tourism and leisure. The company is projecting to turn over €47m this year.



This IT service management company passes 20 years in business next year. Over the last two decades it has grown into a €325m-turnover heavyweight with 5,000 staff, a little under half of whom are based in France. Banking and insurance is the company's major market, accounting for 42 per cent of sales. Other key verticals include insurance and social policy, which represents 25 per cent of Aubay's business, and energy and utilities on 11 per cent.



During its 18-year existence, the company that bears this name had morphed from a French enterprise reseller to a pan-European umbrella brand for 200 entities across 15 countries. Since 2015, Axians has been the overarching brand for the ICT business of France-based construction and energy giant Vinci. In the last few years a number of acquisitions across Europe have been added to the Axians operation. The most notable of these was €740m-turnover networking and comms VAR Imtech ICT, which was acquired in 2014, and recent additions include Swiss services and consulting firm redtoo. Axian's top line now stands at €1.7bn, and the group employs 8,000 people.



Celebrating its 25th birthday this year, this Parisian firm is one of a number of large services and consultancy houses based in France. The company now operates in 16 cities across its home country, and a further 11 nations around the globe. In 2016 its sales came in at €227.6m and it employs 2,500 people. Business & Decision has been listed on Paris' Euronext stock exchange for 16 years.



As well as its own brand, this 34-year Greece-based VAR group operates via four trading entities, including Metrosoft Informatics and the Byte-Algosystems joint venture in its home country, as well as the Byte Bulgaria and Netbyte Cyprus operations. The Athens-headquartered group has long focused on software development and system-integration activities and it holds high-level badges with a range of tier-one vendors, including Cisco, HP, HPE, Google, IBM, and Dell EMC. Turnover in 2015 came in at €22.7m.



Perhaps the biggest of the many major players gathered here, this Paris-headquartered titan passes the landmark of 50 years in business in 2017. During the last half-century it has grown into a true global giant with upwards of 190,000 employees across 40 countries. Revenues last year came in at €12.5bn. The company's business is divided into four key areas: consulting; systems integration; local professional services delivery; and outsourcing.



Based in France, this software and cloud provider specialises in working with retail organisations, with solutions such as e-commerce tools and merchandise, store and inventory management, as well as more generic mobile, CRM, and analytics offerings. The company employs about 2,250 people across the globe, and has a turnover of €307m. It has 17 offices across the globe, including locations in Portugal, Spain, and Italy, as well as the UK and Russia. It also has two US and two Chinese offices, as well as outposts in Canada, Brazil, Morocco, Côte d'Ivoire, the UAE, Hong Kong, and Japan.



This Bordeaux-headquartered VAR styles itself as "the datacentre specialist", and also offers solutions in the fields of cloud, security, unified communications, and digital transformation. Its core partners are identified as HP, Symantec, Dell EMC, Oracle, Citrix, Symantec, and VMware. The firm has 14 offices across France and has boosted its national presence with a number of acquisitions in recent years. Its FY16 revenue rose 11 per cent to €82m, and the firm has targeted growing its top line to €100m.



Claiming to specialise in mission-critical applications and systems, this French player's core vertical markets include defence, security, space, aviation, and energy. The firm has 11 offices in France, as well as three in Germany, and one each in Romania, the UAE, India, the US, and Canada. Revenues in 2016 rose almost four per cent to €176.5m, and the company has an expanding business in emerging areas such as big data and analytics, and 3D virtual reality.



"We are digital transformers", is the strapline of this IT service management heavyweight based in the north-western suburbs of Paris, and with operations in 17 countries across EMEA. The company has been in operation for 20 years, and employs a total of 4,100 people. In 2016 its sales came in at €555m, with 45 per cent of revenue drawn from its home country. Its core partners include a range of tier-one software and cloud brands, such as ServiceNow, Google, Microsoft, Red Hat, and CA.



It may be headquartered in Brussels, but in 2016 this IT services giant generated more than half – 54 per cent – of its €2.54bn revenue in France, with a further 18 per cent coming from southern Europe. About half of the company's sales were drawn from technology management and financing, with almost a fifth – some €475m – coming from product sales, and the rest from services. The business is present in a total of 19 countries, and employs more than 10,000 people.



With a history stretching back 46 years, this company's business was built on IBM's early PC models in the 1980s. Now the Lombardy-based firm offers a range of managed services, covering infrastructure, end-user computing, printing, and networking. It also operates its own datacentre, a certified tier



IV facility opened close to its headquarters in 2015.



Claiming to be one of Italy's leading systems integrators, this company has seven subsidiaries serving cities and regions across its home country. The firm has three core business strands: ICT solutions; cloud and out-tasking; and application development. The company has 100 staff, serving a total of 1,000 customers — including 50 of the 100 biggest companies in Italy. The firm claims to derive 40 per cent of its revenue from services.



Based in France, and with offices in Belgium, Switzerland, Luxembourg, Portugal, Spain, the UK, Poland, Morocco, Côte d'Ivoire, Angola, the US, Mexico, Colombia, and Brazil, this €1bn-turnover player claims to be "the region's leading player in value-added IT services and solutions". The company has 14,000 employees, and has a sharp focus on a number of emerging areas, including smart cities, industry 4.0, digital banking, and 'omnicommerce'.



FY16 revenue at this French VAR and services house jumped 7.9 per cent annually to €305m. The company, which was founded in 1989 and has been listed publicly since 1998, employs 3,650 people across 16 sites in France, plus locations in all three Benelux countries, and China. The firm offers a range of services, including application development, infrastructure management, and consultancy.



Founded in the Rhône-Alpes region, this company has been operating as an IT services provider and ISV for more than 30 years. In 2013 the company instigated the development of "an ambitious strategic plan combining growth and skills development, to balance customer satisfaction and [the] well-being of our employees". The firm works with a wide range of software, hardware, and cloud vendors, including Dell EMC, IBM, VMware, Oracle, Microsoft, and Salesforce. Its core verticals are identified as insurance, financial services, the public sector, logistics and transport, manufacturing, energy, and the luxury goods sector.



A major player in the Spanish market, this VAR has 3,100 staff based across 20 offices in Spain, Portugal, Andorra, Latin America and the US. Ibermática has a top line of €234m and has been in business for 44 years. In addition to its own-brand operations it has four other trading entities: research specialist i3B; automation solutions firm Tecnet; Portuguese engineering software and solutions house Sqédio; and employment agency Ibermática Social.



This company is in the process of taking over €400m competitor Tecnocon, a deal which it claims will "create the leader in IT services in Spain". The additional revenue gained from the buyout will help to offset a reported sales decline of 4.9 per cent in 2016, when turnover came in at €2.71bn. But there was better news on the bottom line, where EBITDA

increased 75.5 per cent to €229m. The improved profitability was, in part, due to a cost-saving programme that saw headcount reduced by 2,816, resulting in a €94m reduction in employee expenses.



Over the course of more than 30 years in business this Milanese VAR has garnered 280 technical certifications from vendors including IBM, Palo Alto, Juniper, and Check Point. Its business covers business applications, data management and analytics, infrastructure, security, and services. Its revenue stands at about €80m.



This company, the history of which goes back 33 years, came into being via the merger of two major players in the Portuguese market — Prológica and CPCis. The firm has offices close to both Porto and Lisbon. Its major vendor partners include HP, IBM, Cisco, and VMware. The company offers a wide range of services, including licensing, consultancy, technology auditing, support, maintenance, and repairs, as well as products covering software, infrastructure, printing, and security.



This Parisian IT house specialises in cloud, infrastructure, and mobile and has 10 offices across France, Belgium, and Switzerland. The firm offers a range of products and managed consultancy services, and key partners include IBM, CA, Cisco, Citrix, VMware, and Red Hat. Turnover in 2016 came in about two per cent down, at €188.8m.



Specialising in data intelligence and digital experience, this Paris-based firm has 2,700 employees spread across 15 countries. The company celebrated 20 years in business in 2016, a year in which revenue rose to €227.9m, including organic sales growth of more than 10 per cent. About four fifths of sales came from large enterprise, with the remaining chunk drawn from the mid-market. Retail and professional services, banking and insurance, and heavy industry are the firm's major verticals, accounting for more than 80 per cent of turnover.



Headquartered in Milan, this VAR has locations in 12 further cities across Italy, as well as offices in the UK and Albanian capital Tirana. The firm has a dozen trading brands, and holds top-level certifications with vendors including Cisco and Oracle, as well as working with other manufacturers such as AWS, Juniper, VMware, and Dell EMC.



Until 12 years ago this company was the Italian operation of the Swiss multinational group Ascom. Now it claims to be one of the leading systems integrators in its national market. It holds Gold partner status with the likes of Cisco and NetApp, as well as Fortinet and Dell EMC Platinum badges. In 2016 the firm, which employs 560 people across sites in eight Italian



cities, turned over €165.5m. Key markets include finance, healthcare, and education.



This publicly quoted French IT company passes three decades in business this year. The firm has locations in 10 cities in its home country, as well as two in Switzerland, one each in Belgium and Luxembourg, and offices in Beijing, Shanghai, and Hong Kong. Its offerings include performance management, digital transformation, data governance, and big data services. In 2016 sales rose more than 10 per cent to €113.5m.



Digital transformation, infrastructure, applications, and outsourcing are the key offerings of this Paris-listed firm. The company employs more than 5,000 people, and its 2016 revenue rose 12 per cent year on year to €446.8m. Since 2009 the company has instigated a programme of international expansion, and now has service centres in Romania, Tunisia, Germany, India, and Singapore.



With more than 1,000 customers and a history that stretches back 36 years, this company is a major player in the Cypriot IT channel. Its ownership structure has changed a few times over the years, but it is now part of the same group as Cyprus' biggest and most famous channel company, distribution giant LogiCom. The VAR holds partner certifications with more than 20 major vendors, including Symantec, NetApp, VMware, Acer, Oracle, HP, Cisco, Lenovo, and IBM. Its business covers the gamut of IT and comms, as well as around-the-clock support, consultancy, and outsourcing. The firm has offices in Nicosia, Limassol, and Larnaca.



This Portuguese VAR is another to have focused on growth via international expansion in recent years, with a 16 per cent rise in sales outside its homeland being a key contributor to overall growth of seven per cent in 2016, when revenue came in at €135.7m. As well as two offices in its home country, the firm now has locations in Spain, Mozambique, Angola, Turkey, and the UAE. The company aims to offer "more than systems" to customers in the energy, government, financial services, telecoms, and transport industries.



In less than 15 years in operation, this firm claims to have become a leader in digital transformation across the markets where it operates: France; Benelux; and Canada. Its stated goal now is to become a major pan-European player in the field of enterprise architecture. The firm has a total of 1,800 staff and works in markets including retail, financial services, the public sector, telecoms, transport, and media.



Former chairman of the board Octave Klaba was recently appointed as CEO to spearhead this French infrastructure-as-a-service player's quest to become a €1bn-turnover player by 2020. The firm intends to hire a further 1,000 people over the next two years as part of the growth plan, and will also

continue on a datacentre-building spree which has seen it construct facilities in Australia, Singapore, and Poland, with more sites currently being set up in Germany and the UK. The company also recently boosted its US business via a deal to acquire VMware's vCloud Air public cloud business.



IP communications, enterprise content management, and cloud are the specialisms of this France-headquartered company, which has a number of offices in Paris and Marseille. Its international business encompasses locations in Spain, Poland, the US, Uruguay, and Brazil. Its trading brands include Alhambra Eidos, O2i, NumArchive, and Imecom, in addition to its own-brand operation. Revenue for 2016 came in at almost €75m.



This company has been part of ManPower Group since 2011, when it was acquired to serve as the US-based consulting and recruitment giant's French IT outsourcing business. The ambition is now to grow that business — which specialises in end-user computing services — across the whole of Europe. ProServia has 18 offices and six service centres in its home country, as well as operations in more than 15 other European countries. The company employs more than 7,000 people across Europe, and turned over €137m in 2015.



This Spanish player has a very well-defined focus on IT and services, serving the "diverse advanced engineering technologies" space. The company has been in business for 30 years, and employs 1,000 people across 15 countries, working with upwards of 1,000 customers. The firm holds certifications with more than 30 vendors, including badges such as Cisco Gold, Oracle Gold, IBM Premier, and VMware Enterprise partner.



The French mid-market sector is the key hunting ground for this 27-year-old firm. It addresses both the IT and the operational technology sector, and a third strand of its business is focused on adjacent areas such as big data, marketing, and training. It employs 2,000 people across nine countries, and turnover this year is set to come in at €150m.



Microsoft, SAP, and Oracle are the core vendor partners of this French VAR, which has 38 years of trading under its belt. The firm has upwards of 7,000 staff, based in a total of 66 offices in France and 14 other countries worldwide, including nine other European nations, plus Canada, Argentina, Chile, Morocco, and India. Revenue in 2016 increased by more than a fifth to €438.8m.



This France-headquartered firm claims to be Europe's foremost integrator and technology expert in the open-source arena. Its statistics — which include a headcount of 1,000 people and turnover that has trebled from 2010 to 2016 to

reach a total of €75.3m — certainly make a compelling case. The company operates from nine locations in its home nation, as well as two in Switzerland, and one each in Belgium, the Netherlands, Luxembourg, Ukraine, Russia, Côte d'Ivoire, and Morocco.

### sopra steria

Headquartered in the Alpine town of Annecy, this is one of a number of global services and system-integration titans based in France. The company has upwards of 38,000 staff across more than 20 countries, and its sales grew to €3.74bn in 2016. The firm identifies Alfresco, Oracle, AWS, Microsoft, and Red Hat as being among its most important vendor partners.

### SPACE

Networking and infrastructure, unified comms, security, and telecoms services are the four key strands of this Greek VAR's business. In addition to its Athens HQ, the firm has five other Greek locations, as well as offices in Cyprus, Malta, Romania, and Serbia. Turnover has struggled to grow during the financial crisis of recent years, but it has remained fairly steady and came in at €44.9m in 2016. Space's key partners include Dell EMC, Cisco, Check Point, VMware, HP, and Microsoft.

### SPIE

Headquartered in France, this €5bn-turnover firm styles itself as “the independent European leader in multi-technical services in the areas of energy and communications”. The company has about 38,000 workers spread across 600 offices in 38 nations worldwide and its business is divided into three key areas: mechanical and electrical services; ICT services; and technical facility managements. Its key development areas are identified as smart city, efficient buildings, energy services, and industry services.

### SQLI

Sweden recently became the latest expansion location for this French digital transformation company when it acquired Gothenburg-based €7m-turnover e-commerce specialist Star Republic. And the company, which has existing operations in Belgium, Luxembourg, Switzerland, the UK, and Morocco, has pledged that it has a €70m war chest to fuel further M&A activity in the Nordics, Benelux, and Germany. In 2016 the firm turned over €190.8m, and its partners include IBM, Microsoft, OpenText and SAP.

### Talan<sup>★</sup>

With a team of 1,700 consultants around the globe, this firm claims to be a “major French player in business and IT consultancy”, and also boasts operations in the UK, Luxembourg, the US, Hong Kong, Canada, and Tunisia. It has been in business

for about 15 years, and sales in 2016 hit €160m.

### Umanis

This €200m-turnover French company divides its business into three key areas: digital; business solutions; and data; the last of which contributes about two thirds of the firm's revenue. Founded in 1990, the company now employs a total of 2,500 consultants and engineers, and works with a vast range of hardware and software vendors, with Microsoft, Oracle, IBM, SAP, and SAS named as its foremost partners.

### uni. systems

Few companies profiled here typify the channel's resilience and adaptability better than this Athens-headquartered integrator. Unisystems celebrated its 50th birthday in 2014, having lived through and been a close witness to one of the worst economic crises ever. To offset the difficulties in its domestic market — in which it has long been one of the biggest players — the company has focused in recent years on growing its international operations. In 2016 about 30 per cent of its €80m-plus revenue was generated overseas, with the goal being to grow this figure to 50 per cent by 2020.

### VAR group shaping innovation

Headquartered in Florence and with a further 23 offices across the country, this reseller is a major player in the Italian IT channel. The firm, which employs more than 800 people, grew sales 18 per cent to €225m in its 2016 fiscal year. It holds upwards of 550 vendor certifications, including Platinum partner status with HP, HPE, and NetApp. VAR Group recently bought a majority stake in €8m-turnover digital transformation consultancy Globo Informatica.

### VISEO

With a focus on “digital experiences, new technologies, business processes, and data”, this France-based IT company has about 1,200 staff and revenues of about €120m. The firm, which also operates in areas of Asia, Australasia, North America, and Africa, works with a range of software vendors including Microsoft, Oracle, Qlik, Informatica, and SAP.

### ZUCCHETTI INFORMATICA LE SOLUZIONI CHE CREANO SUCCESSO

This Italian IT house offers a comprehensive range of products and services, spanning the desktop to the datacentre, as well as security, networking, storage, and software. The company, which has more than 10 offices across the country, employs a total of 2,700 people and counts HPE and IBM as core partners. It also works with manufacturers including Cisco, Lenovo, Citrix, VMware, and Dell EMC.



# Q&A: Nikos Psimogiannos

*International business unit director, Uni Systems*

## Where does Uni Systems fit into the market?

Uni Systems is a systems integrator. We are very active in different market sectors, including the public sector, and the financial and banking sector. We are the oldest Greek-founded [ICT] company — we were founded in 1964. We belong to Quest, which is the largest ICT group in our markets. It manages subsidiaries such as Info Quest Technologies, which is the main distributor [in Greece]. The Quest Group in total has 1,300 personnel, and has been quoted on the Athens Stock Exchange since 1998. In 2016 its consolidated revenues were €400m. Uni Systems has more than €80m revenues, 80 per cent of which is IT services, with [the rest] coming from licensing and hardware. We also have our own solutions — for example we have our own payment solution, and specialist solutions for the banking sector.

## What is your role at the company?

I have been responsible for all operations outside Greece for around eight years now. Just to give you an idea of the growth between then and now, we started with four people and right now we have more than 150 people working for our international business unit. We have a 22 per cent CAGR, and we are [providing] close to 30 per cent of [total] revenues. There is a plan at a group level that, by 2020, we will generate 50 per cent of our revenues outside Greece.

## What was the rationale behind beginning to expand internationally?

It started from our vision and our strategy. Whether it is local, or whether it is outside the borders of Greece, we need to create value for our shareholders. But what we are doing, and what we are committed to, is providing value to our clients. The key aspect of our expansion so far is client-oriented and is about the evolution of our service-delivery models. We are very close to our clients. In 2008 our strategy was to move to countries by following our customers. But since then our strategy [has become] to go into new countries and create customers.

## How have you weathered the difficult economic conditions in Greece over the last decade?

For the Greek business it was already a very clear strategy, before the crisis hit. [At that time] the company generated 100 per cent of revenues from the domestic market. But there was a clear strategy preparing the company to face the crisis by minimising exposure to the Greek public sector, and minimising exposure to the hardware business — which was a bigger part [of our business then] — because it is capital-intensive and a credit risk. We have a very strong footprint in the banking sector, and there was a huge gamble that the banking sector would not collapse. If it had, then it would have been a big challenge [to stay afloat]. But that did not happen, and we maintained our strong position. We minimised our exposure to the infrastructure hardware part, and to the Greek public sector, and we remained healthy.

## What might be your key growth targets for the next few years?

Right now we [sell into] 30 countries. We have three entities so far: one in Romania; one in Belgium; and one in Luxembourg. We intend to expand in the areas where the biggest amount of our revenues are generated. Europe is our prime focus, and we will emphasise the enterprise sector.

## Will expansion into new markets be purely organic, or have you considered M&A activity?

Both are on the table. In some cases organic is preferred, in other cases, when we approach the market it is better to consider mergers and acquisitions. By 2020, we need to grow above €100m. During all of our more than 50 years of successful business operations, we grew on the principles of being close to our clients and [prioritising] client retention. And now we have applied this strategy internationally. We know that we are a small integrator compared with all the rest, but we have the technical experience of all those years. I believe that there is a big future for Uni Systems.



# Ones to Watch

## ■ 2B Consulting

This company has been dedicated to IBM's Cognos platform for more than a decade, and now claims to be France's leading specialist in the technology. The business was founded 19 years ago, has sales of around €14m, and is headquartered in Paris.

## ■ Acensi

With a focus on big data and cloud, this Paris-based firm has 750 staff and annual sales of €61m. The company also has five other French locations, as well as operations in Belgium, Spain, Morocco, and two Canadian offices.

## ■ Antemeta

Services and maintenance, software development, and cloud are the three strands of this IT player's business. Based about 35km to the south-west of Paris, its key partners are HP, Veritas, Pure Storage, Dell, VMware, and Microsoft.

## ■ Atlantica Sistemi

Infrastructure solutions and professional services are the name of the game for this 30-year-old Italian VAR. The company has offices in Milan and Rome, and works with manufacturers including Cisco, Dell EMC, IBM, Lenovo, Oracle, and Red Hat.

## ■ Axiante

A number of analytics and business intelligence vendors — including Qlik, Alfresco, IBM, SAP, and MicroStrategy — are among this integrator's core partners. The company is based in Lombardy, and works in verticals including logistics, energy, banking, media, and fashion.

## ■ Bagnetti Sistemi

This Roman VAR sells a wide range of client technology and holds high-level badges with a number of major PC vendors, including Dell EMC Titanium status, and Apple Premium Service Provider and Solution Expert certifications. It also offers software and training services.

## ■ BI4ALL

Based in Lisbon, this business intelligence-specialised ISV claims to be "like a co-pilot" to its customers — providing all the guidance and information they need to steer their business in the right direction. The firm has created 10 software technologies during its decade in business.

## ■ Compta

Working with almost 40 vendors, this Lisbon-listed Portuguese integrator has been serving its customers for more than four decades. The firm offers a range of infrastructure, security, software, and service management technologies, as well as its own-brand vertical tools.

## ■ Cosmos Business Systems

In addition to its core VAR business, this Greek company also runs a consulting operation and a technology e-tailer, as well as a stand-alone Cypriot business. Providing a range of IT and telecoms offerings, the firm has well over 100 staff and turnover of more than €20m.

## ■ Dedagroup

This Italian VAR and services house has been offering IT

solutions to the mid-market and public sector since the early 1980s. Following the 2001 merger of resellers Delta and Dator, the Dedagroup brand was born in 2008. In recent years the firm has expanded into the US, Mexico, and the Middle East.

## ■ Digora

Founded in 1996, this Strasbourg-based company specialises in data management, and offers a range of consulting, licensing, and managed services. The company also offers training on Oracle solutions.

## ■ Document Store

An annual total of 400 million printed pages is managed by this French VAR, which serves 4,500 clients. Based in Paris, the company has also moved into the 3D printing space, in addition to offering a range of IT and comms products.

## ■ EdifiXio

This France-based web specialist operates across six core areas: big data and search; vertical applications; collaboration and social; ERP and CRM; digital marketing and e-commerce; and application management and cloud. The company has locations in Paris and Grenoble, as well as Kolkata, Bangalore, and a US office in Massachusetts.

## ■ Glintt

A reported 12,000 pharmacies across Iberia use this healthcare specialist's software. The company, which has three offices in its native Portugal plus three more in Spain and one each in the UK, Ireland, Angola, and Brazil, also offers a range of consulting and services offerings. Turnover in 2016 came in at €66.1m.

## ■ ICA

This Spanish IT house divides its business into a quintet of key areas: digital transformation; cybersecurity; infrastructure; services; and BI big data. The company has been in business for 30-plus years, employs 550 people, and turns over more than €30m.

## ■ INETD Consulting

This French storage VAR has a keen focus on emerging and next-generation technology, working with vendors such as Scalify, Actifio, Pure Storage, and Splendid Data. The firm has four offices across its home country.

## ■ Innovery

Headquartered in Rome and founded 16 years ago, this IT firm focuses on the mid-market and enterprise sectors. The VAR provides a range of technologies, including security, storage, mobile, and big data.

## ■ INTM Group

Consultative is the watchword for this French company, which prides itself on employing experienced consultants even in sales-focused roles. The company is projecting to grow revenue by more than a third to €135m this year, and employees 1,500 people.

## ■ IPM

Storage and virtualisation are core areas for this Spanish VAR, which also recently launched its 'Cloud Gourmet' offering to



provide bespoke services to its clients. The firm has offices in five cities across its home country, as well as a Portuguese hub in Amadora. With 150 staff, core vendor partners include Brocade, Cisco, Dell EMC, VMware, Quantum, and F5.

#### ■ ITLink

Founded in 2000 by a group of experienced Italian engineers, this Livorno-based company offers its customers a range of infrastructure design, support, and training services. It has also developed its own Virtual Centre Manager technology.

#### ■ Izertis

This infrastructure-focused integrator operates across six cities in Spain, as well as three offices across Mexico and locations in Peru and Colombia. The firm employs 300 people, turns over about €20m, and partners with vendors including Dell EMC, HPE, Cisco, Microsoft, and VMware.

#### ■ Matika

This Italian VAR has been in business for 25 years, and it prides itself on the loyalty of its client base, having worked with close to 300 customers for more than a decade. The firm has Gold-level partnerships with NetApp, Dell EMC, and IBM, and offers system integration, managed services, security, cloud, and CRM.

#### ■ Nunsys

Comms, networking, computing, and software are the four pillars on which this Spanish IT group's business is built. The collective's trading entities include AINFOR Assessors Informatics, Pla Sistemas, ISI Consulting, and Infonova.

#### ■ Objectif Libre

The strapline of this Toulouse-based IT specialist begins "the open source architects" and signs off "yours cloudly". The firm has 19 employees across its HQ and a Paris satellite office, and is growing quickly, having more than trebled revenue in the last three years.

#### ■ Partenor Group

For the first 22 years of its lifespan this consulting firm focused on the banking and utilities sectors. But, since 2013, it has branched out into areas such as public sector, professional services, and heavy industry, and also acquired companies in emerging technology areas such as mobility, web development, big data, and machine learning.

#### ■ Quadria

This French player claims to offer "outsourcing made to measure" to its 5,000-strong customer base. The firm has 15 offices across France and partners with vendors including HP, Dell, IBM, Fujitsu, and Lenovo.

#### ■ S-Cube

Having operated as an IT infrastructure specialist since its founding in 2006, this French VAR is increasingly focusing on hyperconverged technology. Its major vendor partners include HP, Dell, Nutanix, Oracle, Veeam, and Cisco.

#### ■ SIA

With three offices in Spain and two in Portugal, this VAR considers itself a major player in the Iberian channel. The company works with upwards of 20 partners and offers products, services, and consulting to its clients.

#### ■ SoftCompany

Last year, its 25th year in operation, this French mobile and open source specialist ramped up its headcount, adding 92 employees to take its total to more than 300. The company partners with software publishers including Red Hat, Java, Oracle, IBM and Cloudera.

#### ■ Synchrone Technology

Some 45 per cent of this French company's 1,050 staff are certified technology consultants. Cloud, big data, and 'digital intelligence' are among the firm's core offerings. Turnover in FY17 rose to €127m.



# Best of the Rest

**Abassy Corporate Performance** Spanish Cognos partner and consultancy house

**Ades Ingenierie Informatique** Enterprise VAR based to the north of Paris

**Aexis** BI specialist with 30 years' experience

**Alteis** Offers connectivity services

**Alterway** Open source and DevOps player

**Amexio** French enterprise content management firm

**Anone** Focuses on analytics and process management

**ArcITek** Parisian IT provider

**Arondor** Services house based in Orléans

**BeanTech** Udine-based infrastructure, software, and cloud firm

**Belharra** Works with analytics vendors including IBM, Oracle, and Alfresco

**Bewe** Digital transformation specialist from Lille

**BGFi Consulting** Business intelligence specialist founded in 2002

**Bitech Italia** VAR from Brescia operating for 34 years

**Blueit** Italian services house with a French subsidiary

**BSD** Collaboration and comms specialist

**Cardiweb** Web developer from the French capital

**Castelis** Outsourcing and services firm with €10m turnover

**Ceriel Infrastructure Et Services** Infrastructure and enterprise software reseller

**CFI Compagnie Francaise** Provides infrastructure and management solutions to large companies

**Cleis Tech** System integrator from Milan

**Coheris** Publisher of CRM and analytics tools

**Converge Italia** Roman Cisco, Fujitsu, and Intel partner

**Dacartec** One of Spain's most highly qualified IBM partners

**Datago** Specialises in high-tech services for the media sector

**DCS Easyware** Management and support firm with €33m top line

**Decide Soluciones** Madrilenian analytics player

**Delphis Informatica** Genoa-based IT and services provider

**Delta Informatica Spa** Italian firm offering a range of business and technology services

**Deuzzi** French auditing and maintenance company

**Dimo Software** Creator of management software with €35m top line

**DSMI** Dell EMC and Microsoft partner MSP

**Eclimai Informatique** IT services firm with building and logistics expertise

**eCom CS** Microsoft partner founded in 1998

**Edist Engineering** HPE, Cisco, and Dell EMC partner from Turin

**Ednon** Galician infrastructure, services, and security firm

**EDP** Hardware and software integrator from Florence

**Emilia Informatica** Systems and software company from Piacenza

**Erica** Providing IT to French SMBs for 35 years

**Euro Informatica** Italian infrastructure, security, cloud and services company

**Eurome** Software specialist based in the Italian capital

**Ewad** Offers data warehousing and business intelligence

**Factor-y** Italian IBM partner

**Fastor GIE** Recruitment and IT company from France

**Feel Europe** Employs 800 IT consultants

**GECl** "Smart solutions for a smart world" is this firm's motto

**General Computer Italia** Maintenance and support provider

**Grafidata** VAR founded in Rome 40 years ago

**Groupe 3E** Parisian digital services specialist

**Groupe Altera** Consultancy with branches in Lille and Paris

**Groupe HN** Offices in Paris, Bucharest, Lisbon, and New York

**Groupe KPF** SAP specialist from France

**Grupo Antea** Operates across Spain and Mexico

**Gruppo Sinapsi** Italian VMware, IBM, and Microsoft VAR

**Habber Tec Internacional** Big Blue-focused VAR from Madrid

**Henix** IT and consulting firm from Paris

**Hitech Pros** French ITSM outfit

**IAN srl** Milanese server and storage VAR

**IENA Consulting** Specialises in finance and business performance software

**Infodis IT** Recently received private equity investment

**Infodata** Italian IT VAR

**Inforges** SAP-focused consultancy from Spain

**Informatica El Corte Ingles** Spanish firm that promises to "make the digital future a reality"

**Information Consulting** Offers products and consultancy in Italy

**Intercomp Marketing** Maltese firm offering a range of client products

**Interdata** French network integration specialist

**Irene** Specialises in industrial applications

**IT&M** Start-up digital services company

**Itaware** Rome-based product and support provider

**Kaliop** Open source expert

**Kangaroo Net Company** Roman IT and cloud company

**Klee Group** Software firm celebrating 30th birthday this year

**Labinf** Turin-based tech company

**Le Groupe Nova** UC, analytics, and big data company

**LineData Services** Global software and services player

**Linkcom** Portuguese hardware, software, services, and cloud player serving SMBs

**Logos Technology** Datacentre and telecoms VAR from Venice

**Lojelis** French Oracle and SAP partner

**Luce Innovative Technologies** Valladolid-based IT provider to enterprise and education sectors

**Lusodata Servicios Informaticos** Managed services and maintenance company from Portugal

**Mauden** Italian SI with €45m top line

**MC2I Groupe** French VAR and consultancy with London office

**Micro Blanc Informatica** Microsoft and VMware partner from Spain

**Nanosoft** Cloud, infrastructure, security, and services firm

**Netapsys** Has six offices in France and a Madagascan outpost

**NetXP** Infrastructure consultancy from France

**Novatim** Provides IT and telecoms to enterprise customers

**NSIT Systems** Parisian consultancy

**ObjectWare** Serves the financial services, heavy industry, and telecoms sectors

**Oceane Consulting** French firm that hit €25m sales last year

**Omega Peripherals** Offers services and big data in Barcelona

**Omnilog** Turns over €15m a year

**Omnitech** Has a team of 60 consultants

**Open Canarias** Serving the Canary Islands

**OSInet** Specialises in application acceleration

**Ozitem** Offers infrastructure and systems in Paris

**Pamafe Informatica** Portugal-based VAR founded in 1998

**Philog** Focused on IP communications

**PMC** Italian systems and storage integrator

**Pragma Management System** IBM, HP and Hitachi house from Italy

**Prodware** Microsoft Dynamics provider from France

**Project Milano** Italian Dell VAR and system builder

**Prolival** Colombes-based infrastructure VAR

**Prometil** Consulting and services company from Toulouse

**PSE** Offers products, analytics, and services across Portugal

**PTL Limited** Malta-based support and product provider

**RIS 2048** HPE Platinum partner from Portugal

**S&A** Italian company working in the public sector, telecoms, and finance sectors

**Safira** Portuguese professional services company

**Sanmarco Informatica** Vicenza-based firm focused on enterprise applications

**Saytel** IBM-focused solutions and services house from Madrid

**SC-DAM** French firm branching into hyperconverged infrastructure

**Setra Conseil** Specialises in database technology

**Sfeir** Has three locations in France and a base in Luxembourg

**Sistemi Uno** IT and communications provider from Turin

**SME UP** Serving the small business market from three offices across Italy

**Sodi France** IT services management firm with numerous locations across France

**Soft Computing** French company specialising in digital marketing and big data

**Softeam Cadextan** French firm with a team of 400 consultants

**SolutionData** Security and support company from Toulouse

**Soluzioni Edp** Provides document-management technologies

**Sothis Tecnologías de la Informacion** Spanish firm offering solutions from SAP and other vendors

**Sully Group** France-based digital services firm with €20m-plus turnover

**Systemic** Offers data-focused solutions and services from Paris

**Taisa Syvalue** Spanish provider of solutions and services

**TCSI Digiberia Tecnologías** Seven-year-old Portuguese reseller

**Technicomer** Greek company with 35 years' experience

**Tessi** French firm offering document services

**Them-is** Consulting and engineering firm from Nancy

**TLTI Informatique** Has three business units offering consultancy, integration, and engineering

**Totalstor** Storage firm operating across Iberia

**Trentinort** Bilbao-based IT solutions house

**TT Tecnosistemi** Software company based in Italy

**Uno Informatica** Security player with three offices across Europe

**Velorcios Informatica** Dell EMC, VMware, Citrix, Microsoft, and Veeam partner

**VIDATA** Offers video technology and data marketing services

**Viveris** French firm serving enterprises and the mid-market

**VM Sistemi** Italian ICT firm founded in 1984

**VMark France** Parisian VAR focused on IBM

# THE NORDICS

## The Elite

The Nordic region is perhaps the most uniformly mature market profiled here, with five countries – Finland, Norway, Sweden, Denmark, and Iceland – with stable economies, high living standards and, what is more, a reputation as having an unmatched thirst for new technology.

The Nordic market is renowned as being a world leader when it comes to adopting emerging technology, particularly in recent years when the region has been at the forefront of shaping the new world of mobile computing and communications, via giants such as Nokia and Ericsson. Adjacent to these mega-brands are a number of major IT services outfits, such as Atea, Tieto, and Evry, and many more mid- to large-sized players with a strong presence in one or more Nordic countries. The players profiled here tend towards to services-rich, highly technically skilled companies, but there are also several big players that revel in still operating as a reseller, and take pride in offering a breadth of IT solutions.

With a cumulative population less than a third of that of Germany, the region as a whole, and each country within it, represents a comparatively small market. But the Nordics punch above their weight both individually and collectively. Although the five countries are separated by language, governance and culture, the operations of even typical a small-sized VAR demonstrate that the region coheres to some sense of collective identity. Most companies in our report operate in one or more market beyond their home country, with many – particular those hailing from Sweden – operating across three or all four of the mainland Nordic states.

Denmark, meanwhile, may be smaller in size and population when compared with its northern neighbour, but sharing a land border with Germany gives Danish firms attractive expansion opportunities in central and western Europe. In the east of the region, Finnish VARs benefit from proximity to the former-Soviet states of the Baltic, and you will find a number of firms on this list have branched into nations such as Estonia, Latvia, and Belarus.

But even those with no ambitions beyond their regional, or even national borders will find that the Nordics offers its IT providers a wealth of opportunity.

### addedo

Founded 10 years ago, this Swedish firm is an application consultancy with a focus on IBM's Cognos technology. It also works with vendors including SAP and Microsoft, and serves about 150 customers on a monthly basis, supporting their financial reporting, planning, and analysis. The company has offices in Stockholm and Malmö, as well as outposts in Switzerland, Germany, and the UK.



With four offices across the country, this company claims to be “one of the premier application and cloud integrators

in Sweden”. The firm offers migration, integration, and management services for technologies including business intelligence, database, CRM, productivity tools, and infrastructure. The firm was founded by a quartet of entrepreneurs in 2000.



Tracing its roots back to 1939, this Reykjavik-headquartered firm has almost eight decades of history. Nowadays, it claims to offer its customers a “one-stop shop for everything IT related”. The firm has 1,000 staff across offices in its home country, plus Sweden, Norway, and Denmark, and holds vendor badges from the likes of Microsoft, Dell EMC, Oracle, HP, Google, Xerox, and IBM. In 2016 the company turned over almost €170m, with EBITDA margins of a little more than 10 per cent.

### Affecto

Listed on the Helsinki Stock Exchange, this business intelligence provider has significant business in Finland, Norway, Sweden, and Denmark, as well as a Baltic and CEE operation encompassing locations in Latvia, Lithuania, and Poland. It also has an office in Johannesburg. In 2012 the company turned over €112.5m, with a little over four fifths of this generated in its home nation. Affecto works with a wide range of software vendor partners including Qlik, Microsoft, IBM, SAP, and Informatica.

### ATEA

Claiming to account for a fifth of the Nordic and Baltic market, this Norway-based firm styles itself as the northern European leader in IT infrastructure. The company employs 6,900 staff, including 4,000 consultants, across 86 locations in seven nations: Norway; Sweden; Finland; Denmark; Latvia; Lithuania; and Estonia. It provides a comprehensive array of hardware and software products from the IT world's leading vendors, and its 2016 sales came in at €3.29bn.



This IBM Platinum partner claims to be a market leader in Denmark in the provision of storage and backup as a service. The firm, which was founded in 2003, has two Tier II datacentre facilities in its home country. In addition to its storage business, the company also offers various security services, and monitoring and reporting tools.



Specialising in working with customers in the oil and gas industry across the world, this company has offices in a number of cities that reflect its market focus: Aberdeen; London; Houston; Dubai; Calgary; and two in its home country, in Oslo and Stavanger. The firm, which provides specialised workspace solutions for its clients, counts Microsoft



as its most important vendor partnership. Turnover in 2016 stood at €53.5m.



This Finnish firm offers a range of outsourcing, licensing, life cycle, and professional services that it claims rivals cannot, or would “not dare to produce”. The company, which has offices in Helsinki and Turku, has 60 staff and is projected to turn over €30m this year. The firm is 56 per cent owned by Sentic Partners, a private equity house specialising in investments in small and mid-sized Finnish companies.



This Norwegian licensing and cloud specialist grew sales by almost a third to NOK 6bn (€630m) in 2016. In recent years it has grown via acquisition, in its native country, as well as Denmark and, most significantly, in the US. Another key growth engine has been the development of its channel business, providing cloud licensing and related services to other resellers. It currently generates around a quarter of its business indirectly, with the mid-term goal to grow this figure to 50 per cent.



Focusing on the mid-market and large enterprise, this Swedish integrator offers a range of telecoms, data and security services from 20 offices across the country. The business has 700 staff, with a focus on technically certified employees. Owned by carrier giant the Telia group, the firm has a top line of more than €200m.



Holding Gold partner status with Microsoft and HP, and a Platinum badge from HPE, this Danish VAR offers a range of IT infrastructure, ERP solutions, and hosting services. The firm has been in business for 30 years and has a top line close to €40m. It has two offices, in Aarhus, and Allerød, north of Copenhagen.



This Finnish software and services house turned over €85.6m in 2016 and is listed on the Helsinki NASDAQ exchange. The company has seven offices across its home country, plus a Swedish hub in Stockholm, and it works in verticals including logistics, heavy industry, the public sector, banking, and insurance. Microsoft and IBM are the firm’s major vendor partners, and the business provides a range of applications including workforce management, analytics, and e-commerce solutions.



With a catalogue containing about 200,000 products, this Stockholm-based heavyweight does not shy away from the definition of ‘reseller’. The company sells primarily online, via dedicated sites in its home country, as well as Norway, Denmark, and Finland. In its 2016 fiscal year the firm posted revenue of about €850m, around 90 per cent of which came from the corporate sector, with the SMB space representing the VAR’s core market. Dustin has a total of more than 900 workers across the Nordic region.



Claiming to be “by far” Europe’s leading specialist in Microsoft Dynamics technology, this Denmark-headquartered titan has a total of 2,000 staff across 27 locations in the Nordic region. The business turns over almost €250m a year and celebrates its 40th birthday in 2017. In addition to its VAR and services business, it sells a range of products online from vendors including HP, IBM, and Lenovo.



With more than half a century of experience under its belt, this company is one of the most experienced on this list. The Finnish-headquartered firm divides its business into five core areas: business solutions; IT transformation; financial process services; strategic accounts; and emerging businesses. The company has seven locations in Sweden, three in Finland, and one in Norway, and turned over €127.6m in its most recent fiscal year.



With a total of 10,000 staff, this Norwegian firm is one of the biggest IT players in the Nordics, and claims that over four million people across the region use an Evry-delivered service each day. The business is split into three entities, serving the Norwegian and Swedish domestic markets, and a specialised financial services operation working on a global basis. The company has a top line of about €1.3bn.



This company specialises in working with the Nordic region’s biggest organisations, in sectors such as financial services, professional services, healthcare, government, retail, and utilities. In addition to its two Norwegian offices and one location apiece in Sweden and Denmark, Itera also has outposts in Kiev and Bratislava. The firm offers services including application development and management, consulting, and business intelligence. The firm employs 400 people and has sales of €45.9m.



Based in Stockholm, this company offers a wide range of products from PCs up to high-end computing, operating via a VAR model and also selling online. It also offers a number of services such as cloud provision, virtual desktops, and document management, as well as consultancy. The company has more than 400 staff employed at about 30 locations across Sweden.



Passing a total of 40 years in business next year, this company claims to be Finland’s foremost PC manufacturer, having made and sold its own Osborne brand machines since 1986. A self-declared “domestic company, and proud of it”, the firm also offers refurbished models and IT management services, as well as selling technology from vendor partner Dell.



Offering a range of hardware, software, professional, and technical services, this player styles itself as one of Iceland’s

biggest and best IT VARs. The firm passes 25 years in business this year, and has a headcount of 500 staff. The company posted revenues of about €130m in 2016.



Having been founded in 1985, this is another long-standing player in the Icelandic IT market. The company also operates internationally, offering a range of infrastructure solutions, both on-premise and as a cloud service. HPE, Cisco, Microsoft, Red Hat, and VMware are identified as the firm's five core partners.

## PROACT

This Sweden-headquartered storage integrator recently ramped up its German business with the acquisition of €35m-turnover NetApp and Juniper partner Teamix. Proact's sales in 2016 surged past the €300m mark as the firm also achieved its long-stated ambition of pre-tax profit margins that exceeded five per cent. Services now account for more than a quarter of the company's sale, with cloud being a particular growth hotspot in last year's closing quarter.

## PULSEN

Operating via seven trading divisions, this Sweden-headquartered firm has a group turnover of about €230m. Its business covers business intelligence, e-commerce solutions, and managed services. Core vendor partners include Microsoft, IBM, and Qlik. The firm has been in operation since 1964 and it operates seven offices in Sweden and one in Finland.



This company operates via six business groups, covering consulting, product supply, connectivity, the enterprise sector, the public sector, and software. The firm was founded in 1986 and has 13 offices in its native Sweden, four each in the US and Ukraine, two in China, and one apiece in Finland, Hungary, Poland, India, and Canada. Sigma employs a total of 3,000 people.



Selling via a web shop and a VAR business, this Norwegian outfit provides a wide range of computing hardware, software, networking, cloud services, and peripherals to the corporate and public sector. It names its core partners as HP, Lenovo, Cisco, IBM, Samsung, Kingston, Microsoft, and Adobe. Its customers can buy online using a bespoke portal, which Stepper claims greatly simplifies the procurement process.

## tieto

This 14,000-strong operation is enduring a tricky time of late, as it embarks on a mission to achieve annualised cost savings of €40m, including a plan to let go as many as 250 employees in its native Finland. In 2016 the IT services monolith posted sales of almost €1.5bn, but in the new year's opening quarter restructuring costs of €13.5m contributed to a decline in profitability which saw EBITA margins fall from 8.6 to 6.5 per cent.



# Q&A: Rune Syversen

*Chief executive, Crayon*

**Last year you spoke about growing the channel portion of your business as part of your evolution into more of a services and cloud player. How is that going?**

The business has been developing in that direction. We are starting or, even more than starting, we are really getting traction with the transformation to developing services in the cloud. We had a very good Q4 [with] strong growth within the Microsoft side — we are particularly starting to see traction on the Azure platform, which was more or less the starting point for rolling out our own self-service platform covering Microsoft, Amazon, and IBM. We now have 750 partners active on the platform, and I think it will continue to be very successful. We are starting to see demand and uptake on the cloud store grow in both the channel business and the direct business.

**What are some of the key investments you are making in the future of Crayon?**

We invested about \$10m in our IP, and also in new geographies. The US is the biggest investment we have ever made, and it took us about 12 to 15 months to really find the right kind of set-up, and the right kind of approach. The US market is very different to other markets and, especially in the early months, [we found it] much more transactional and with a much more short-term focus than we would find in Europe. I would say we have made a huge bet of taking a position and working as a new breed of partner, on the value side — particularly in the SME space. We also recently were approved by Microsoft as a distributor on the CSP platform; that really demonstrates the fact that we have a different approach.

**What are you expecting from your financial performance this year?**

We were in an investment phase, but we are now in a stronger position, and we believe we will break even this year. More important is that we are getting traction with the deeper and more value-added type of approach. The market is definitely interested in going deeper than it has done. The complexity of the cloud from a pricing perspective and the consumption perspective is interesting. [In terms of] the future of our indirect and channel business, that is definitely a figure that continues to grow. That is more or less defined by the end customer — as more and more customers are outsourcing and moving to the cloud, they need more and more different kinds of players. Our channel business is going to outgrow the direct business.

**Does increasing your channel business — which may bring you into more competition with the broadliners — threaten your profitability?**

I think the main difference [between us and the broadliners] is that, first of all, we are a hybrid between reselling and distributing. We are used to working with end customers, and we are used to building an end-to-end offer for them. We can offer the consulting side. And, if you look at some of our SAM projects, [those] are engaging with our deployment capabilities. It is all coming together. I think what is happening to our industry is more or less what happened to travel agencies 20 years back. The business model is changing and we need to do a lot more with a lot less. The difference between travel agencies and what we do is that the complexity with cloud is tremendous. You need to understand the commercial side and the technology side, and you need to understand what the end game is, and the return on investment — whether it is Azure or AWS.

**Several channel players have told us that they need to offer AWS due to customer demand, but that selling it is not particularly profitable business. Do you find it difficult to monetise?**

Obviously all the hyperscale cloud providers will be in our portfolio, and what we implement is based on customer and partner demand — and also being able to offer value-added capabilities around their offerings, which we think is critical. You cannot be a cloud distributor without having a strong consulting practice. With AWS, we are very much able to build on it, and we are able to bill consulting around it. But, without that, you will find it hard to make money on any platform.

**Who do you now see as your competitors?**

There are a lot of small, local players that are strong in different areas. We do not really have a head-to-head competitor — at least in the way we are positioning our SAM practice, which is very different from what SoftwareONE or Comparex are doing. To some extent we compete with PwC and Deloitte. But I do not really see that there is one [competitor] that really has the same strategy that we have. The big players are getting bigger, and the smaller ones are more or less vanishing or being consolidated. I think that we have the footprint and the capabilities, and now for us it is all about expanding those capabilities, and building IP where we think we can play a role, and where we can differentiate ourselves from the usual suspects.





# Ones to Watch

## ■ Advectas

Headquartered in Sweden, this software publisher states that “we are passionate about performance — nothing else”. The firm has three offices in its homeland, and locations in Denmark, the Netherlands, Germany, and Australia. In addition to its own products, the firm also works with vendors including IBM, Microsoft, Qlik, SAP, and Infor.

## ■ Attido

Employing more than 120 engineering staff in Finland and Latvia, this analytics and ERP firm promises to free up its customers’ time, allowing them to concentrate on what they are good at. The firm was founded in 2001, and has grown since then into a €10m-turnover company.

## ■ Braathe Gruppen

This Norwegian cloud specialist offers a variety of monthly packages, beginning with a basic Office 365 online suite, through to its ‘Complete’ offering which includes full virtual desktop, messaging, and support. The firm, which has been in business for 28 years, also offers products from manufacturers including Cisco, IBM, Lenovo, and HP.

## ■ Dubex

Claiming to be Denmark’s leading specialised exponent of IT security, this 20-year-old player works with the likes of Blue Coat, Check Point, F5, and RSA. Based in Copenhagen, the company also has an office in the country’s second city Aarhus.

## ■ EdgeMo

Despite being in business for less than six years, this firm prides itself on the range of high-end badges it has received from tier-one vendors, including Apple Authorised Reseller status, and Gold-level badges from a variety of manufacturers, such as HDS, HP, Microsoft, HPE, and Dell EMC.

## ■ Inmics

Founded in 1989, this Finnish IT provider remains family-owned, and employs 160 people — the majority of whom work “in customer service or expert sales”. The firm turns over more than €30m annually.

## ■ Invid

This Swedish VAR splits its business into three units, covering IT infrastructure, cloud services, and business support. It claims to focus on helping its customers realise cost savings and efficiency benefits.

## ■ IT-Total

It may have been in business for just six years, but this company is already confident that it is one of Sweden’s leading specialists in IT infrastructure. The company, which employs 75 people and turns over more than €10m, also offers services from its own datacentre.

## ■ Kapacity

Based in Copenhagen, this VAR specialises in business intelligence and analytics, offering IBM Cognos technology, as well as solutions from Microsoft and TARGIT. The company also offers a range of consultancy, proof-of-concept, and training services.

## ■ Knowit

Microsoft and HPE are two of the major vendor partners of this Stockholm-listed IT company. The firm employs 1,850 people in Sweden, Norway, Denmark, Finland, Estonia, and Germany.

## ■ Middlecon

“Big data without angst” is this this Stockholm-based firm’s mission statement. It has also branched into a number of emerging-technology areas, including big data and blockchain.

## ■ Move

Almost four fifths of this Oslo-based firm’s 50-plus employees are consultants. The firm specialises in the design, sale, implementation, and support of IT infrastructure. It also has a mobility division.

## ■ SecureDevice

Network security, data security, digital identities, and mobility are identified as the four key strands of this Danish firm’s business. IBM, McAfee, SafeNet, and Check Point are among the VAR’s vendor partners.

## ■ Skye Solutions

This seven-year-old company has two offices in its native Norway and two more in Sweden. The business focuses on SAP’s technology, and also works with ReadSoft. It employs about 100 people.

## ■ Solid Park

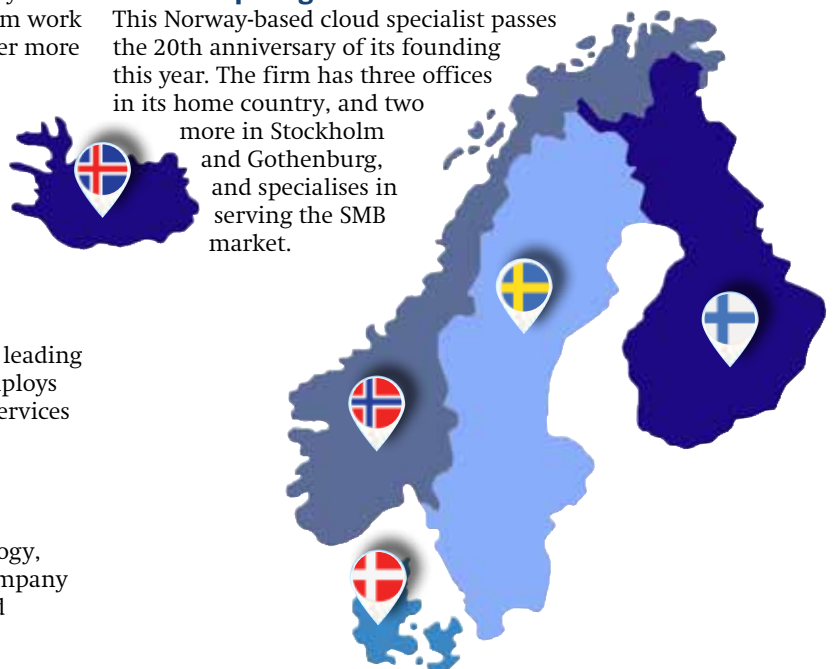
Founded in 2005, this company employs 80 people across five offices in Sweden. The firm offers a range of systems, storage, cloud, and virtualisation services.

## ■ Solteq

Headquartered in Finland, this software house specialises in digital customer engagement, offering a range of commerce and marketing tools. The business turned over €63m in 2016.

## ■ Telecomputing

This Norway-based cloud specialist passes the 20th anniversary of its founding this year. The firm has three offices in its home country, and two more in Stockholm and Gothenburg, and specialises in serving the SMB market.



# Best of the Rest

**123 Data** Oslo-based IT store

**AC IntelliCom** Danish provider of hosting and support

**Addera IT** Swedish firm offering installation and support services

**Alliero** Provides a range of packaged and bespoke consultancy services

**Apendo** IBM-focused content management specialist

**Areto Solutions** Trondheim-based digitalisation specialist

**B2B Solutions** Offers IT and communications solutions

**Candidator** Swedish firm offering security, telephony, infrastructure, and outsourcing

**CloudNexus** Cloud and backup provider from Finland

**COMM2IG** Apple partner based in Denmark

**Compose IT** Swedish company of 25 years' standing

**Cristie Nordic** Specialises in storage and backup

**DataCompagniet** Microsoft, Meru, and Fortinet partner based in the Danish capital

**Decens** Founded in Tampere in 2008

**Digisys Multidata** Recently bought a monitoring specialist

**ED-data** Danish firm that celebrates its 15th birthday this year

**EdgeGuide** Web designer with two Swedish offices

**Eglu** Danish software developer specialising in the healthcare space

**Elinar** IBM Gold partner from Finland

**Enfo Framsteg** Offers service and asset management solutions

**Enter SystemSolutions** Offers IT services to businesses and the public sector

**Firstpoint** Consultancy with two offices in Norway

**Foniks** Sells computing, software and gaming technology online

**H2** Swedish provider of consulting and system integration

**Houston Analytics** IBM Premier partner from Helsinki

**Icecon** Works with IBM, Huawei, and Citrix

**iKnow Solutions** Norwegian firm with offices in London and Amsterdam

**InfoWare Solutions** Offers a range of IBM software and services

**Inopi** Danish digital business specialist

**IntraVision** Microsoft and IBM house from Copenhagen

**IT Voimala** Espoo-based IT house

**Itavis** Danish VAR founded in 2001

**Item Consulting** Norwegian consultancy

**iTet** Systems, cloud, and maintenance firm

**IT-mastaren** Swedish IT provider with three offices

**IT-WIT** System, hardware, and consulting firm from Denmark

**JDM** Microsoft-focused cloud player

**Kannettavatieokone.fi** Finnish e-tailer that works with all the major PC vendors

**Kirakuna** Small consultancy based in Oslo

**KJAER DATA** Odense-based IT infrastructure provider

**KK88.No** Microsoft, IBM, and Lenovo partner

**Komplex IT** Offerings include storage, server, and backup as a service

**Konehuone** IT provider from Espoo

**Kontorland** Security firm with four offices

**Labtech Data** Offers PC, gaming technology, and repair services

**Lan-x** Veeam, HP, and Microsoft partner

**Layer 8 IT-Services** Offering networks, security, and services for seven years

**Lin Education AB** Education-focused Swedish VAR

**Load System** Security, infrastructure, cloud, and analytics house

**Locotech** Has three offices across Finland

**Longana Software** Experts in IBM licensing

**Loop Partners** VAR and web shop

**MAKE IT Finland** Finnish IT company

**Marcello Communication** Works with the big three public cloud partners

**Midanos** Cognos-specialised business intelligence partner

**Molgaard Data** Offers IBM Power Systems

**Morex** Works with a wide range of storage vendors

**MOTUS** Specialises in lifting and handling systems

**Netverkspartner AS** Norwegian VAR founded in 2001

**Netwell** Finnish social business specialist

**Office Center** Provides Apple and Microsoft technologies

**OlapCon** IBM Premier business partner from Finland

**Procano** Has three offices in Norway and one in Sweden

**PROconsult** Odense-based VAR

**Prog-It** Provides consultancy and services

**Proshop** Sells a range of PCs, tablets and smartphones

**RAV Norge** Employs 40 staff, serving about 100 customers

**Ravn IT** Offers support, website-building, cloud, and virtual desktop

**SataCom** Finnish firm offering Office 365 and other services

**Savecore** Offers cloud and infrastructure solutions from three offices in Sweden

**SBL Data** IBM, Microsoft, WatchGuard, and Symantec are among this firm's core partners

**Shibuya Crossing** Core offerings include connectivity, security, management, and services

**Snorre Data** Cloud, backup, and software provider

**Sofor** Has completed more than 2,000 software projects

**Soleno** IBM-specialised consultancy

**Solita** Finnish digital services company

**Spellpoint** Identity and access management company from Finland

**Sucaba** Enterprise performance management specialist

**Sysco** Norwegian Oracle partner

**Systempartner** Cisco, Lenovo, Huawei, Dell, and Check Point partner

**TheBPlan** Oslo-based firm founded in 2009


**Theilgaard Mortensen** Danish firm offering e-commerce tools

**Timetech AS** Specialises in IT supply chain management

**Uniplus** Offers PCs, workstations, and servers

**Wincore** Counts IBM, VMware, Dell, and Veeam as its major partners

**Xact Consulting** Modernisation and migration are this firm's core offerings



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# THE UK & IRELAND

## The Elite

Considering the UK's historically distant relationship with Europe – both physically and figuratively – it could be considered surprising how important the country is to the continent's IT sector. Many major technology firms, both vendors and services houses, have their European or EMEA base in London or the counties to the west of the city, which have long been something of a hotbed for tech.

Of course, a lot of that has to do with the language; a large number of vendors still come from Silicon Valley or elsewhere in the US and even those that do not are probably very used to conducting business in English, which remains the lingua franca of the IT industry – and, indeed, much of the rest of the business world. And, although it is an island, the UK still offers very easy access to most major cities in Europe, which in many cases are little more than an hour's flight away.

The fact that many US start-ups and emerging vendors make the UK the first stop-off on their international expansion journey means VARs in the country have a great opportunity to become pioneers in the early adoption of new technology. Consequently, the UK IT sector is among the most mature in the world, and the channel is stocked with scores of skilled and sizeable players – both homegrown and imports.

In the last two or three decades its neighbour on the other side of the Irish Sea has seen its technology sector blossom. Many major technology vendors – including Dell, Microsoft, and Apple, which has its European headquarters in Cork – have established major offices in Ireland. And the country's own technology firms have also thrived; the Irish channel has a strong services bent, and this list contains numerous accomplished and mature managed services providers.

And Ireland's tech scene – particularly in capital Dublin – could see further growth during and following the UK's impending departure from the EU. The spectre of Brexit remains the elephant in the room for many in the UK IT industry, and the impact the process will have on the sector will only become clear over the coming months, years – and even decades.

But the channel, in the UK, Ireland, and anywhere else you care to visit, is typically made up of pretty resilient players. Whatever happens in the years to come, do not be surprised to see the companies profiled here – and many more besides – continue to prosper and profit.



It may be listed in New York, but this global consulting and services megalith has its official headquarters in Dublin. The firm has five defined divisions, dubbed Strategy, Consulting, Technology, Digital, and Operations. In its 2016 fiscal year, the company's revenues rose 10.5 per cent to \$32.9bn and, at year end, the business employed about 384,000 people, based in upwards of 200 cities across 55 countries. The firm's European

business contributes more than a third of overall turnover, with sales growing 11 per cent in local currency in FY16 to a total of \$11.45bn.



Now AWS is a \$14bn business and being pursued doggedly by a chasing pack led by rivals such as Google and Microsoft, cloud is certifiably big business. But nine years ago cloud was little more than the latest buzzword beginning to crop up with increasing frequency in vendor and analyst presentations. Some were quicker than others in discerning the market's direction of travel, and Google Cloud Premier Partner Ancoris deserves plaudits for leading the charge into a new style of computing. The company was one of 50 worldwide to trial the search engine giant's first IT channel programme in 2008, and has been a committed advocate of cloud technology ever since.



This managed print specialist has been on quite the shopping spree in the last couple of years, beginning with the transformational buyout of £40m-turnover rival Balreed in summer 2015. The company made no fewer than five acquisitions in the following year, including German Canon partner BAS Bürosysteme, Ireland-based Hibernian Business Equipment, and three deals in the UK: Welsh MSP kon-X Wales; Scotland's DBS; and London-based CityDocs. But it saved the biggest until last, confirming earlier this year that it has acquired Danwood, the only print VAR in the UK to boast a bigger top line. The newly united duo have a revenue well in excess of £250m, and more than 25 offices across the UK and Ireland, as well as locations in Germany and France.



Headquartered in Dublin and with a satellite office in London, this managed infrastructure specialist has a history going back 36 years, for the last six of which it has operated under its current name. The company counts computing heavyweights Dell EMC, Cisco, and VMware among its core supplier relationships, a roster which these days also includes ServiceNow, a vendor whose partners have become hot property in recent months. The company has declared its dedication to "open-book pricing and continuous improvement".



Creator of the PassBridge platform for helping businesses connecting IoT and mobile devices, this Dublin-based firm is at the forefront of the next wave of connectivity and computing. In addition to offering its own patented technology, the company provides its customers with offerings from vendors such as AWS and Dell, as well as IoT specialists including Multi-Tech, Episensor, Firmwave, and FleetFi.



# CAPITA

With sales of £4.9bn and a headcount of 73,000 people, this London-listed firm is surely the biggest technology services player to call the UK its home. The company delivers business process and IT outsourcing from a total of almost 100 delivery centres across the globe. The firm also has a long track record of acquiring VARs, with major UK channel players it has acquired over the years including ComputerLand and, more recently, Trustmarque.



A major reseller on the other side of the Atlantic for many years, this US giant landed in the UK relatively recently. But the company arrived in some style, buying Kelway — one of the biggest VARs in the country. That deal closed in 2015 and, the following year, the business was rebranded to CDW UK. Based in London, the firm's turnover stands at about £670m. Apple, Cisco, Dell EMC, Lenovo, and Citrix are among its key vendor partners.

# claranet

After a series of acquisitions over the last couple of years, at the beginning of 2017 CEO Charles Nasser pledged that “we won't slow down”. With four deals agreed already this year — for firms in the Netherlands, France, Portugal, and the UK — he is certainly as good as his word. In between times, the UK-headquartered MSP has also set up shop in Italy in its first organic expansion move since 2000, as well as attracting an £80m investment from French private equity outfit Tikehwa Capital. More M&A seems certain.



After being acquired earlier this year by investment giant Blackstone, this London-headquartered cloud services provider is all set to expand internationally. It began its global journey with the opening of an office in Dallas in May, its fourth location in the US. The firm also has locations in Canada and France, and is planning to move into Switzerland. In addition to its own software, the firm also offers technology from the likes of AWS, Microsoft, and Salesforce.



This publicly quoted firm may be very well established as the UK's largest IT VAR, but these days its business offers a lot more than that. In 2016 its group sales rose 6.3 per cent to £3.25bn, with a 16.1 per cent boost to its €1.6bn-turnover German business being the high point. Another plus was the fact that, for the first time, the company's services revenue for the year exceeded £1bn, and the firm can point to a wide array of major desktop and infrastructure services contracts across both the public and private sectors.



Beginning life as an SMB-focused telecoms provider in 2001, this company has moved deeper and deeper into the converged world of IT and cloud, most notably through a trio of acquisitions of major VARs and MSPs: Phoenix; Damovo; and Alternative Networks. All of which has turned the company

into a £720m-turnover heavyweight — with the stated aim of growing further and becoming a £1bn player. It still offers telecoms, but now has a thriving IT services, hosting and product-supply business, and holds a range of badges from vendors including Dell EMC, Cisco, and HPE.



The second player owned by Japanese telecoms monolith NTT, this Johannesburg-based network integrator is a \$7.4bn-turnover global player. The company employs 30,000 people across 49 countries and, with annual sales of more than £250m, its UK operation is among its largest. Digital infrastructure, hybrid cloud, the workspace of tomorrow, and cybersecurity are its key offerings.



With three sales offices in Dublin, Belfast, and County Wexford, and a trio of service centres in Limerick, Cork, and Galway, this company claims to be “Ireland's leading ICT solutions provider”. Datapac racks up 35 years in business this year, and it counts Dell EMC, Microsoft, Cisco, VMware, Citrix, Sophos, and IBM as its major partners. The firm offers a wide range of services and products, covering client and print technology, networks, storage, virtualisation, backup, and around-the-clock support.



Founded in 1990, this company claims to be the foremost exponent of systems integration and managed services in the Irish market. The firm has offices in Dublin, Cork, and Waterford, employs about 250 people and claims to support upwards of 100,000 devices across the country, from a 60,000 sq ft facility in the capital city.



This US giant's EMEA business grew a little more services-centric last year, with revenues in this sector rising 22 per cent in constant currency, compared with increases of six and one per cent in software and hardware sales, respectively. But software remained the company's biggest money spinner in the region, accounting for more than six in every 10 dollars of revenue, with Insight claiming to be Microsoft's leading cloud partner in EMEA. Overall turnover in the region came in at \$1.34bn in 2016.



Late last year this Dublin-headquartered company announced plans to recruit 150 people by the end of next year. This increase, which is backed by government agency Enterprise Ireland, represents a twofold increase on its current headcount. The firm, which also has offices in London, Birmingham, and New York, offers a range of managed security services, as well as products from the likes of Check Point, Fortinet, RSA, Cisco, and Blue Coat.



This UK-headquartered integrator, which has a global top line of \$1.5bn, has endured a difficult time in its home country in the last year or two, as it presses on with a restructure of its UK operation. But this has not stopped the Cisco Gold partner from continuing to invest in emerging technology areas,

including some major moves in the IoT space. Logicalis has had a burgeoning IoT business in Latin America, which it has now migrated to Europe, where it recently won its first big deal in the sector in the shape of a smart cities project.



Following its landmark acquisition of Azzurri Communications, this publicly quoted firm more than doubled in size in 2016, with revenues jumping 114 per cent to £108.3m. After claiming to have wrapped up the integration process unexpectedly speedily, the firm appears to be ready for more consolidation activity, with CEO Eddie Buxton recently announcing that Maintel remains on the lookout for potential acquisitions, “particularly within the managed data and hosted services arena”.



Some 24,500 products were shipped from this firm’s Cork warehouse to its customers in the last year, as the company completed 330 projects — all while maintaining 97 per cent compliance with its service-level agreements. The firm offers a range of datacentre, client, and application services, and works with manufacturer partners including Microsoft, VMware, and Citrix.



Based close to the licensing hotbed of York, this software VAR has grown strongly in recent years, and in FY16 took its top line to £118.4m, an increase of almost £4m. The firm’s bottom line saw an even more marked improvement, with net profit increasing 7.4 per cent to £3.9m. In the last couple of years the company has seen a healthy expansion in its software asset management business.



Working with vendors including Polycom, VMware, NetApp, and Cisco, this Dublin-headquartered firm claims that most of its customers are members of the Fortune 100. The company, which was founded in 1998, has two further offices in its home country, as well as a location in Belfast and a US base in California. The firm offers a range of networking, communication, and datacentre technologies.



Beginning life in 1994 as an Irish offshoot of UK software player SPSS, this company has grown into one of the leading analytics specialists across the UK, Ireland, and further afield. The firm sells its own predictive analytics technology, as well as products from the likes of IBM. It also offers training services.



This UK channel heavyweight may have shrunk in bulk a little over recent years, but the lost revenues have been sacrificed in the name of increased profitability. In FY16 the company’s revenue in its home country dipped one per cent

year on year to £653m, but EBITDA jumped by nearly three tenths to almost £25m. Its €1bn-turnover French business is more product-centric than its UK counterpart, but is likely to replicate the journey towards services over the next few years. The firm has also made some major investments in its future in recent years, including building several datacentre facilities, and establishing a support and DevOps hub in Ho Chi Minh City.



Annual sales at this US-based software licensing titan rose 12 per cent in 2016 to \$7.56bn. Its business in Europe was led by a 22 per cent increase in the top line of its UK operation, which turns over something in the region of £200m. Last year its burgeoning AWS operation — which more than trebled in size — was among its major successes, although even its stalwart Microsoft business outpaced its wider growth rate, expanding 13 per cent.



A year and a half on from floating publicly on the London Stock Exchange, one of the UK’s biggest VARs shows no sign of slowing down; its FY17 first-half sales leapt 29 per cent to £378.5m. And, all the while, the company’s management insist that the secret of its success is no more complicated than “sticking to the knitting”, and following its tried-and-trusted model of building out its graduate sales force and expanding gradually into new areas while continuing to do what it has always been best at. Unusually in this day and age, it does not shy away from the term ‘reseller’, nor the business that comes with it.



Styling itself as a value-added manufacturer, this education specialist is probably the biggest independent PC manufacturer still operating in the UK channel. In addition to its own-brand machines, the firm also works with tier-one PC vendors such as Apple, Acer, and Lenovo. The Staffordshire-headquartered company also offers infrastructure solutions and managed services.



This Mancunian firm has grown into perhaps the foremost UK-based provider of hosting and datacentre services. The company has made a number of investments in its future growth in the last year, including the acquisition of two UK security firms: ethical hacking specialist Pentest; and cybersecurity outfit Secure Information Assurance. UKFast also invested £2.3m in its datacentre facilities earlier this year and, in March, agreed a digital transformation-focused partnership with another UK security firm, Secarma, as well as Slovakia-headquartered MSP and outsourcer Soitron — another member of our Elite.



Claiming to be Ireland’s fastest-growing IT services company, this firm recently attracted a €90m investment from London-based equity firm Volpi Capital, with which it intends to fund further expansion in the UK and the rest of Europe. Part of the growth plan involves the creation of 365 new IT services jobs at its HQ in Dublin city centre over the next three years. An extra 100 roles will be created this year, while next year will

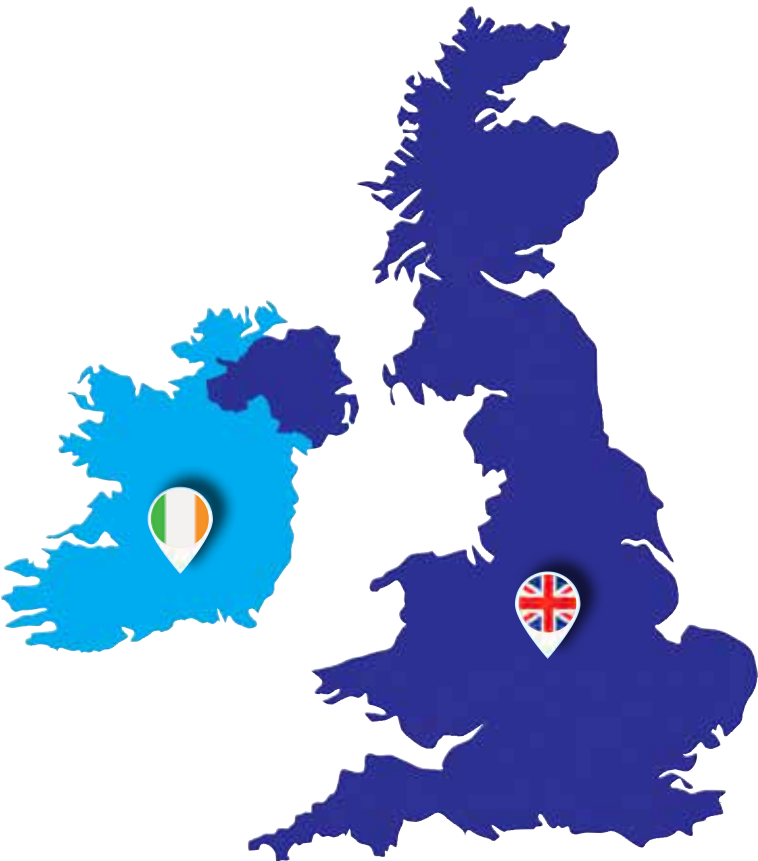
see the business take on 70 graduates.









Another US giant to appear in the UK section of our report, this reseller generates more than \$1bn of its reported \$9bn top line outside its homeland. This includes a UK operation with estimated revenues of about \$175m. More than 40 people are employed at its London office, as well as 65 more at a location in Amsterdam. The company has big plans for its EMEA operation, with a minimum growth target of 25 per cent set for this year.



In 2016 this Nottingham-based channel firm added upwards of £50m to its top line as revenue rose 17.2 per cent to £358.5m. Traditionally a specialist in the education market and the wider public sector, the company is targeting increased presence in the corporate space in the next year or two. Since 2015 the firm has added system-building skills to its long-standing VAR business, following the acquisition of Viglen.



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The Elite: 200					
Ones to Watch: 125					
Best of the Rest: 500					
Grand total: 825					



# Q&A: Martin Hellawell

*Chief executive, Softcat*

## **Another year, another set of huge growth figures for Softcat. Is it really as simple as keeping on doing more of the same?**

Yes, exactly the same old model! Just lots and lots of graduates coming in, and a lot of them making it through and becoming team leaders, or setting up an office. We also keep adding on bits and bobs — in the last 18 months we have grown our managed print business, and we are doing more and more on the contractual support services as well. If we look at our existing customers, there are very few that are doing everything they can with us. So, there is a real push on helping our sales guys go back to our existing customers and ask those questions. It is quite a journey with the salespeople, so we have to support them, and train them. But that has been a real winner for them. That is the typical model — we just keep on trying to add to that portfolio. We listen to what [customers] are buying and scale up accordingly.

## **Do you have to supplement the graduate intake with recruitment of experienced people?**

The model that has probably worked best for us is that we have generally taken on somebody external [and made them our] subject-matter expert. When we decided six years ago that we wanted to go into the public sector, we took five guys who had been at other resellers at some point in their career and knew how that market worked, knew their way around. We have done the same thing with the managed print team — [we hired] one or two people who were very good at that, and then built a team around them. That is the model that has worked for us best. With new branches, we have always set those up with internal people — we have taken five or six internal people who have wanted to relocate and set up [the office], and build the team.

## **What are looking for in a graduate? Do you assess them with aptitude tests and detailed psychological screening, or is just a case of going on gut feeling?**

We have a big recruitment team, and they are the face of the organisation. We have 10 full-time recruitment people, and they do graduate recruitment fairs, and open days every Monday. They have a good sense of who could be made of the right stuff. They will do the first screening and put them through to the second

stage, where the candidates will meet team leaders and sales managers. They can spot the right people who can work in the Softcat environment.

Having said that, in the first 18 months a lot of those people will leave of their own accord, because it is hard doing new business — there is nothing harder than doing new business. They have to go and get on the phones, get on LinkedIn, find those customers and, slowly but surely, build their business volumes. When we win an account, it is extremely rare that they will say 'I will stop working with Insight and move all my business to you'. It takes two or three years to build that. After [they have got through] the first 18 months, they tend to stay for a long time. Firstly because those first 18 months are so hard, and you have to invest so much in terms of blood, sweat, and tears. But, secondly, because we try to make Softcat a good place to be.

## **Can we expect more expansion in the UK?**

We did Glasgow last year, that was the last new office that we opened. I think we will probably do another one or two over the next 18 months to three years, but we are under less pressure to do it than we were before. Part of the success of [each office] is about recruiting the sales team, and it is flipping hard to do. We are in numerous conversations, but most of our graduates want to live in Glasgow, London, Leeds, Manchester or Bristol. It is not like we need to do it — we set up branches

because when we have individuals who want to start up an office — which is almost like starting a new company — it is a good project for someone. We haven't stopped but if, in three years' time, we haven't done any more, that would not be a major disappointment.

## **And what about international expansion?**

It depends how far forward we are thinking — most of my time is spent thinking about the next hour!

When we do stand back, I think Softcat will, in time, start moving into other geographies. But, to use a football analogy, I would rather play at home than play away. And in Germany, France, or Ireland there are really good VARs out there, and we would be going to take on some established companies. Probably the return over the next three years would be greater in further UK penetration than it would be in going abroad.





# Ones to Watch

## ■ Academia

As the name suggests, this London-based firm specialises in the education sector. The company was founded in 2003 and traditionally focused on Apple technologies but has expanded in recent years to offer solutions from vendors such as HP and Microsoft, and work with more clients in the corporate world.

## ■ Action Point

Dell EMC, Microsoft, VMware, Sophos, and Veeam are the major vendor partners of this Irish-based MSP, which was founded 12 years ago. The company has offices in Cork, Dublin, and Limerick.

## ■ Bell Integration

This VAR has more than doubled in size in the last couple of years, and now boasts a top line comfortably in excess of £100m. The firm, which works with the likes of IBM, Dell EMC, and NetApp, has offices in the US, Singapore, and New Zealand, in addition to its two UK locations.

## ■ Bytes

In its 2016 fiscal year this licensing and cloud specialist took its turnover close to the £200m mark, following 17 per cent growth in its core software services business. The firm also has a cybersecurity unit generating annual sales of almost £20m.

## ■ CCS Media

Somewhat more of a traditional player than other more services-centric operators on this list, this company has shown that there is life yet in the traditional VAR model. The firm has grown strongly every year for some time, and in 2016 took revenue past £150m.

## ■ Centerprise

This VAR and system builder has been manoeuvring itself away from volume business and towards more value-based sectors in recent years. Consequently revenue has shrunk somewhat, but in FY15 the company's operating profit nigh on trebled to a total of almost £2m.

## ■ Chess

With more than 100 acquisitions in its 24-year history, this telecoms firm is no stranger to M&A. But its consolidation activity has been more strategic than purely accretive in

recent years, with deals for IT VAR Lanway and cybersecurity specialist Foursys.

## ■ CloudStrong

It may have been in business for only six years, but this Irish player claims to have already taken a total of 30,000 people to the cloud. The company, which has offices in Dublin and Castlebar, specialises in migrating people onto Microsoft platforms.

## ■ Cobalt

Holding Platinum partner status with flash high-flyer Pure Storage, this Dublin-based player is leading the charge to the next generation of infrastructure technology. It also counts Cisco, VMware, and Microsoft as core vendors.

## ■ Coretx

The name may be a relatively new one, but this is an established player. Or two players, to be precise, as Coretx was born from a merger of VARs Selection Services and C4L, both of which were acquired in 2016 by Castle Street Investments.

## ■ DNM

Claiming to have more than 150 customers across Europe, North America and Asia, this Irish company claims to be a truly international company. The firm specialises in cloud and analytics and, in addition to its Dublin HQ, has a transatlantic office in Toronto.

## ■ Dovetail Technologies

This Dublin-based firm offers software development and IT consultancy to a wide range of public and private sector clients across Ireland. The firm works with vendor partners including Microsoft and Oracle, and develops solutions for Windows, Android, and Apple platforms.

## ■ DTP Group

Holding Platinum partner status with both HP Inc and HPE, this VAR is one of the UK's most highly accredited across both halves of the former HP business. In addition to solutions from the desktop to the datacentre, the company also offers services and analytics.

## ■ EMIT

This Dell and Microsoft partner has built its business on



four key pillars: business productivity; infrastructure; cloud computing; and security. The company was founded 13 years ago and is headquartered in the Irish capital.

#### ■ GCI

Following its acquisition of embattled cloud poster boy Outsourcery, this MSP claims to be among Microsoft's most decorated partners in the UK. The firm, which boasts a top line of almost £50m, has promised more M&A this year.

#### ■ Island Networks

This firm's heritage is Irish, but its business is now truly transatlantic, with offices in Dublin and Pennsylvania. The cloud and infrastructure specialist counts Cisco and NetApp as its core partners.

#### ■ Jigsaw24

With revenues approaching £100m, this company is perhaps Apple's biggest UK partner in the B2B sector. The firm, which sells into sectors including media, design, and education, also works with vendors including Microsoft, Adobe, and VMware.

#### ■ Managed 24/7

Last year this Cisco Gold partner invested £1.5m in a network operations centre it claims can apply analytics to as many as one billion devices. The company offers a range of managed services, and has a keen focus on emerging areas such as IoT and hybrid IT.

#### ■ Misco

This company has endured a tough few years, but is planning to return to profitability in the UK next year following a management buy-in led by seasoned channel exec Alan Cantwell. The firm, which was previously owned by US giant Systemax, has a top line in the UK in excess of £200m.

#### ■ ProStrategy Colman

Specialising in IBM business analytics and Microsoft Dynamics technology, this IT company has been in business for 32 years. The firm, which has offices in Dublin and Cork, also has a training business.

#### ■ RedPixie

In November last year this MSP spun out Nimbrix, a cloud-based asset management technology the firm has developed, and claims is the first of its kind. Core vendor partner Microsoft was reportedly instrumental in the process.

#### ■ Stacked

In addition to IT services and managed print, this company

has a product supply business that it claims covers "paper clips to PCs — and everything in between". Veeam, VMware, Microsoft, Cisco, and HPE are among the core partners of the Dublin-based firm.

#### ■ SureSkills

Training and certification programmes are the bread and butter of this company, which boasts offices in Dublin, Belfast, Ottawa, and Austin. The firm also offers consultancy and outsourcing services.

#### ■ Total Computers

In the space of half a decade this VAR has taken its top line from little more than £10m to upwards of £50m. Services has been a core growth area in the last couple of years for the Lenovo, HPE, and Cisco partner.

#### ■ Trilogy Technologies

This Dublin-headquartered MSP landed on the other side of the Irish Sea in 2014 with the acquisition of London VAR b2Lateral. In addition to its core MSP business, it holds badges with a range of vendors including NetApp, VMware, and AWS.

#### ■ UKCloud

One of the leading suppliers on the UK government's flagship G-Cloud framework, this company recently launched a dedicated division to address the healthcare space, where it claims cloud adoption stands at just two per cent. The firm employs 180 staff.

#### ■ Ward Solutions

With offices in Dublin, Limerick, and Belfast, this player claims to be the biggest Irish provider of IT security services. As well as managed security services, the company provides a range of high-end offerings, such as risk audits, penetration testing, and forensic security. Focusing on central government agencies and blue-chip corporates, the VAR claims to work with 300 of Ireland's 1,000 biggest organisations.

#### ■ Zinopy

Founded in 2010, this Irish IT player has expertise in security, mobility, cloud and virtualisation, and professional services. The company works with over 30 vendor partners.

#### ■ Zones

The UK and European operation of this US channel giant may be somewhat smaller than that of its peers, but the firm has plans to use the £40m-turnover UK operation as a beachhead for growing across the continent. Zones offers a wide range of hardware, software, services and cloud solutions.



# Best of the Rest

**1E** Software life cycle automation specialist

**AdEPT Telecom** Acquisitive publicly quoted comms VAR

**Altodigital** Print and office technology specialist

**ANS** Mancunian networking and cloud provider

**Asystec** Data management player with offices in Ireland and Scotland

**Auxilion** Cloud and support provider

**AVMI** Audiovisual integrator

**Black Marble** One of Microsoft's first HoloLens partners

**Blue Chip** Independent IBM support provider

**BT IT Services** IT integrator arm of telco giant

**Buy IT Direct** E-tailer with £100m-plus sales

**Bytek** Dublin MSP with a wealth of vendor badges

**CAE** VAR that partners with Cisco, Microsoft, and HP

**Cisilion** UK player with offices in New York and Hong Kong

**Cloud 9 Insight** SMB-focused Microsoft Gold partner

**CSI** Acquisitive VAR and MSP

**DataDirect** Self-styled "IT concierge"

**Definitive Solutions** IT services firm founded in 1999

**DGtek solutions** Office 365 specialist

**Diatec** Autodesk house with three offices in Ireland

**Digicom** Print and audiovisual VAR

**Dimension Network Systems** Sells networking products from the likes of Cisco and Extreme

**eBECs** Microsoft Dynamics specialist headquartered in the UK

**eBuyer** Big e-tailer of IT products

**Edenhouse Solutions** Birmingham-based SAP partner

**Eolas Technologies** Provides managed services to SMEs

**Esteem** Citrix, Oracle, and Dell partner

**Eurieka IT** Sells PCs and printers online in Ireland

**European Electronique** VAR and cloud firm focused on the education sector

**EVAD** Managed and support services firm

**Excitech** CAD specialist

**Exigent Network Integration** Cisco house focused on networks and security

**GBM Digital** Manchester-based Apple specialist

**GCI** UK MSP with 16 years in operation

**GDK Network Systems** Monitoring, support, and managed services specialist

**Grey Matter** Specialist licensing reseller

**Hardware Group** Broker and networking VAR

**HCS Business Solutions** Outsourced IT provider with two Irish offices

**ICT Services** Field services specialist in Ireland

**Innovate Business Technology** Cloud services firm that works with Cisco and Microsoft

**IT Lab** MSP with offices in London and Manchester

**IT Quotes** Uses an innovative online quoting tool

**K3** Publicly quoted retail software specialist

**KCOM** Telecoms firm with extensive VAR operations

**LAN Consultants** Irish networking specialist founded 20 years ago

**MCSA** Maintenance and managed services firm

**m-hance** ISV and Microsoft partner

**Millgate** IT and telecoms provider

**Minttulip** Microsoft cloud specialist

**MJ Flood Technology** Cloud, mobility, big data, and IoT firm

**MTI** Storage and networking VAR

**NCC Group** IT security consultancy

**NG Bailey IT Services** Specialises in voice, data, and cabling

**Novatech** System builder from Portsmouth

**NSC Global** London-based Cisco Gold partner

**OCSL** Has targeted expansion into services

**PC Specialist** PC builder that creates gaming machines

**Printerland** Print reseller that works with all the major vendors

**ProAV** Focuses on audiovisual solutions

**Probrand** Has begun to develop its own IP

**Q Associates** Server, storage and cloud specialist

**Qualcom Systems** Irish provider of break-fix maintenance and managed services

**Radius Technologies** Cloud, cabling and networking firm with three offices in Ireland

**Red Stack Tech** One of the UK's top Oracle partners

**Redcentric** Acquisitive London-listed firm

**RedstoneConnect** Smart buildings specialist

**RM** Education-specialised MSP and VAR

**RocTel** Networking and comms player with offices across the UK and Ireland

**SBL** Public sector licensing VAR

**SecureData** MSSP moving towards the cloud

**Sord Data Systems** HP Platinum partner that sells online and works with the public sector

**Storm Technologies** Fast-growing HP, Microsoft, and VMware partner

**Stormfront** UK Apple Premium Reseller

**Strencom** Offers managed connectivity and cloud

**Sysco** ERP and CRM specialist

**System Video** Audiovisual integrator that works across the continent

**tec support** Managed IT, hardware, and cloud supplier

**The Saville Group** AV reseller that can trace its roots back 141 years

**Timico** Managed cloud specialist

**Trams** Apple VAR that has branched out in recent years

**Triangle Computer Services** Works with IBM, VMware, and Cisco

**Ultima** Aims to become completely cloud-based

**Unity Technology** Offers cloud computing and unified communications

**VEI** VoIP player based in Ireland

**Vohkus** HP partner that has trebled in size within a decade

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