

# CHANNELN€OMICS



In association with



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# Welcome to The European Elite 2018

Welcome to the *European Elite*. For the second year, *Channelnomics Europe* has, in association with Agilitas, taken on the formidable task of mapping and defining the eclectic and ever-changing beast that is the European channel.

Defining the European channel is a task which is as daunting as it is ambitious. From catalogue resellers, managed service providers and systems integrators to telcos, IT services firms and IT consultancies – the channel is a vast and all-inclusive organism that has expanded to include all manner of IT organisations in recent years. The array of vendor partners operating in the European channel is dizzying. Every niche imaginable – be it by technology, by sector or by geography – is bound to be served by some variety of channel partner.

Countless VARs have claimed they are feverishly branching out into new technology areas as margins from selling PCs, servers and software licences continue to diminish. In addition, several established channel players – as well as little-known niche ones – are gearing up for European, or even global, domination. The emergence of cloud and e-commerce models has, in many ways, made the political and geographical boundaries by which Europe and the rest of the world is divided become irrelevant, paving the way for even the smallest channel partner with fewer than 100 staff to reach for global ambitions.

With this in mind, as with last year's edition, we have endeavoured to approach the European channel with an encyclopaedic scope, covering all 44 countries that make up the continent – from Iceland to Greece, and from Ireland to Russia.

Last year's *European Elite* featured a grand total of 825 firms comprising 200 of Europe's Elite players, 125 Ones to Watch and 500 Best of the Rest. In defining the Elite last year, we considered a range of factors. Of course, we took into account the size and scale of each firm featured in the Elite 200, but we also measured European channel partners on their technical certification, and included others that have set out particularly impressive expansion or growth plans for years to come.

## What's different this year?

As with last year, we have divided the Elite into six geographical regions – Benelux, CEE, DACH, France and



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Southern Europe, Nordics and the UK and Ireland – based either on where they are headquartered or where they draw the majority of their business.

This time, however, we have taken a slightly different approach. For each region, The Elite are now ranked by revenue, in order to give readers a clearer idea of which resellers are the key heavy hitters in each market.

We have also featured in-depth profiles for each reseller in our Elite – providing a comprehensive account of their activity over the last 12 months and, where possible, their growth strategies for the next few years. In addition, this year includes a country-by-country geographic breakdown of each Elite player's European coverage, as well as exclusive Q&As with high-profile channel executives for each geographic region.

Furthermore, as another evolution on last year's report, this time we have aimed to

take a closer look at the channel's specialists. We are aware that there are VARs, systems integrators and MSPs across Europe that have sought to specialise around a single vendor or a single area of technology. In light of this, the second edition of the *European Elite* has a new section: “Meet the specialists”. We have identified Europe's channel firms that have looked to fulfil customer needs around four very specific technology areas: cybersecurity, comms, business applications, and print.

This year's edition has put the spotlight on more than 100 specialists from across the continent working in these four technology fields.

Lastly, 2018's edition includes a timeline of the resellers that have exited the ranks of the Elite – either through going out of business or through consolidation. We also, for the first time, feature *Channelnomics Europe's* Ones to Watch – six firms that we believe are going to turn heads in Europe's IT channel over the next few years.

It has been a phenomenal year for the European channel, with emerging tech such as AI, machine learning and IoT coming to the fore and public cloud giants AWS, Google and Microsoft among others ambitiously expanding across the continent. The channel has arguably never been better placed to reiterate its relevance for customers in a new era of IT.

■ Josh Budd is content editor at *Channelnomics Europe*.

# Why continental Europe is more accessible than ever

The European IT channel landscape is becoming increasingly difficult to define, as many channel businesses expand their operations across borders throughout Europe and the rest of the world. With this significant shift comes massive opportunity for those companies that have already started to transform their business models to remain relevant to their customers' ever-changing needs. As this year's *European Elite* report demonstrates, the rules of engagement are changing in a disruptive market and this presents exciting times ahead for those who dare to be brave.

As more organisations are offering services to channel partners across borders, there is increasing focus on how decision makers in these businesses tackle the inevitable challenges. As a result, Agilitas has identified globalisation, relevance and transformation as three key themes that will feature heavily in the strategy of its channel partners in the months and years to come.

To support this, Agilitas is about to embark on a new research-led thought leadership campaign, looking at the main considerations that its customers – and the wider European channel – will need to consider when expanding into new global markets.

The catalyst for this is the move to an increasingly customer-centric, outcome-based approach in developing existing services and introducing new products to the market. The exact needs of the customer must be adhered to, as out-of-the-box solutions are no longer viable. If they require a service that its current channel partner(s) cannot directly offer, they must work to deliver this through inter-channel collaboration.

This is where relevance is crucial; developing the services and solutions that directly meet a business' short and long-term objectives. To achieve this, businesses must be open and transparent with themselves in what is required to succeed as an international business; expanding the footprint more often than not requires a significant transformational shift.

Building on its innovative 'European Channel in 2020' campaign, this visionary foresight has already been well received by a number of Agilitas' channel partners including international partners such as Canalys and Ricoh Europe – special thanks to Robin Ody and Dan Davies respectively for their enthusiasm and time in taking part in *Channellnomics'* *European Elite* report in association with Agilitas.

Agilitas' own expansion strategy mirrors that of its channel partners, becoming a natural extension of its clients' own propositions. Through its superior relationships with partners, it has grown its footprint exponentially to currently trade in over 80 countries worldwide. This has been facilitated through



**“International growth for Agilitas has demonstrated the appetite for its customers to enter into an increasing number of partnerships”**

its market-leading inventory-as-a-service solution for existing and new channel partners, providing IT support, training, repairs, hardware sales and technical support.

This approach is rubbing off on Agilitas' customer base; it is already working internally, and with its channel partners, to encourage increased innovation and collaboration when assessing globalisation. This will ensure that their strategic goals are not only met, but exceeded, while helping them to explore their own international possibilities.

Agilitas' relationship with global vendor partners such as Cisco and IBM is an example of how it is using collaboration to reach new customers in new markets. As a valued Cisco Partner, Agilitas has been able to expand its international Cisco capabilities for existing channel partners, while opening

up its unique proposition to new channel partners looking to expand their geographic footprint.

Similarly with IBM, it is providing Agilitas with access to its extensive global technical teams, in order for Agilitas to bolt on engineering services to maintenance contracts for those channel partners that require both a part and engineer to site. This inter-channel collaboration is the ideal way to quickly bolster a channel provider's portfolio of services, while increasing margin and loyalty from the customer.

Key to Agilitas' growing international presence is meeting the needs of customers across global markets, achieved by adapting its commercial model to allow for flexibility. It no longer uses a one-size-fits-all model that works for some but not for all; this approach should be adopted by its UK and European channel customers when looking to expand into international markets.

International growth for Agilitas (international sales represent approximately 20 per cent and growing of its business) has demonstrated the appetite for its customers to enter into an increasing number of partnerships, which it has found is reflective of the overall European channel.

Before the next *European Elite* report is issued, the UK will have officially left the EU. It is therefore crucial that businesses that conduct the majority of their operations within the UK continue to develop a European and global services provision, helping to mitigate any uncertainties surrounding Brexit. This is also dependent on how their end customers transition from current markets to new ones ahead of the UK's official exit on 29 March 2019; they must look to transform their businesses to remain relevant in a strengthening global market where fortune favours the brave.

■ Shaun Lynn is CEO of Agilitas IT Solutions.



# THE ELITE: Benelux



**Revenue: €750m**

One of the Netherlands' most celebrated success stories in the IT channel, Infotheek has grown from a €55m-turnover outfit to a €750m behemoth in the last nine years. Founded in 1991, Infotheek bills itself as a "circular IT specialist", offering refurbished hardware and IT leasing to its customers.

The firm is now present across 12 European countries, boasting a workforce of 900 staff.

Jordy Kool, the man who has been in the hotseat at the Leiden-headquartered firm since 2013, announced his intention to step down as of 1 April. Infotheek recently stated that former HPE executive Hans Daniels will take over the reins at the firm from 5 July.

Privately owned by Swedish investment fund Altor, Infotheek has made some colossal acquisitions over the last few years – namely Scholten Awater in April last year, later followed by €120m-turnover networking and storage partner Centralpoint in June. Centralpoint's CEO Brian Speelman was then appointed chief digital officer at Infotheek at the beginning of the year.



## BearingPoint®

**Revenue: €710m**

This IT consultancy giant has something of a chequered past. The BearingPoint name came into being in 2002 after its former owner, auditing firm KPMG, spun out the company as a separate business unit – then called KPMG Consulting – on the NASDAQ stock exchange in 2001. BearingPoint posted a few years of dismal financial figures, which culminated in its US business filing for Chapter 11 bankruptcy in 2009.

But after a management buyout later that year which saw BearingPoint's HQ move to Amsterdam, the consultancy firm has been going from strength to strength, opening offices across the globe and buying up small outfits across the UK, Germany and the Nordics.

Now the firm is present across 19 European countries, and claims to be able to service its customers in a further 11 countries through its partnership model. Revenues grew by 12 per cent in 2017, reaching €710m, while EBIT surged by 18 per cent. BearingPoint is aiming for €1bn in sales by 2020.



## Getronics

**Revenue: €500m**

With its roots in Amsterdam, Getronics has been in business for more than 125 years, starting life as a shipping and engineering company. Now the firm employs 4,500 people worldwide and has offices in 22 countries across Europe, APAC and Latin America.

The €500m-turnover heavyweight has changed ownership twice in the last six years. Dutch telecoms firm KPN acquired Getronics in 2007. It then sold a majority stake in the company to German investment house AURELIUS which, in turn, sold it to Brazilian strategic investor Bottega InvestCo in July 2017 for €220m – its biggest ever valuation.

Getronics has undergone a change in leadership under its new owner. Nana Baffour, Bottega InvestCo's majority shareholder, took charge of the firm, with former CEO Mark Cook becoming group vice chairman.

Baffour has since told *Channelnomics Europe* that he would "rather own Getronics than a gold mine", and talked through his plans to add €300m to the firm's top line over the next two years, with 70 per cent of that growth expected to come through M&A.



**Revenue: €414m**

European expansion is very much on the agenda of this Belgian cloud and IT infrastructure player. The company sold off almost a quarter of its shares to local venture capital house Gimv in order to fund organic and M&A-based expansion into new geographies and double its top line within five years.

The firm currently has a foothold in eight European countries, employing 4,000 staff. 2016 revenues climbed by an impressive 12 per cent to €414m. Cegeka claims it can take on big-ticket infrastructure projects and business-process nearshoring from its Bucharest services centre.



**Revenue: €345m**

A top software partner of Microsoft, Oracle, IBM and Salesforce, Ordina claims to specialise in cloud, mobility and big data. Founded in 1973, the firm employs 2,700 staff across the Netherlands, Belgium and Luxembourg, logging 2017 revenues of €345m.

This Dutch systems integrator has endured a difficult couple of years, logging its third consecutive year of sales decline in 2016. Its share price suffered as a result, plummeting 31 per cent following the release of its 2016 figures at the beginning of 2017. Ordina's public sector business in its Dutch homeland had been spiralling for a number of quarters, prompting Ordina to implement a €15m cost-cutting programme, which saw the firm shed 175 staff during the course of 2016, and a further 149 last year. The programme seemingly paid off; the Nieuwegein-based integrator's EBITDA shot up by 251 per cent in 2016 to €15.1m, after posting just €4.3m the previous year. 2017 profits, however, dipped again to €14.5m.







# Q&A: Thomas Fetten

*Chief executive, SecureLink*

## **Which qualities does a CEO at a fast-growing company such as SecureLink need to have?**

As part of a global company, you encounter the cultural challenges that come with managing clients and employees in the Nordics versus in Central Europe, for example. There are different decision-making processes, so the Nordics is very consensus driven, very democratic, a lot of conversation, a lot of convincing. Whereas the Germans, in a black and white picture, I would paint the Germans as hard discussion and then a hard decision. Whether or not everyone is on board, it doesn't matter. When the decision is taken, everyone runs after that same objective. It is a very different model.

SecureLink needs somebody who has multi-country operational experience, who has that cultural sensitivity, and who understands the complexities of governance and coherence in a group and bringing that together, defining that single vision and aligning the right resources and value proposition to the clients to that.

## **How will your experience as COO of a global company like Getronics play into your role as SecureLink CEO?**

In two years' time I think we are going to see a market that will require us to make significant investments, train our people differently and look at new product fronts – so the security element of security services is tremendously high. A parallel to what I've done in my previous roles at IBM or at Getronics is focusing those investments correctly. That really doesn't change with regards to the size of the company, or the revenue, or the number of countries. Once you are in multiple countries, the complexity doesn't grow exponentially, it flattens out. For the first five countries, yes, it gets tremendously more complex, but if you add countries six, seven or eight, it doesn't really matter.

## **What are your growth priorities for SecureLink going forward?**

We have three main drivers. Number one is simply scale. We made acquisitions in Germany and the UK. Both of those units still have potential to grow from a customer base and from an employee base, so we would see acquisition opportunities in certain markets such as Germany and the UK and those would obviously be very attractive. That would be just scale within the country.

Then there is my view which is to just scale and grow in geography or physical presence in certain geographies, so that could be that we are trying to supply services to very specific clients that request a service in another part of Europe or APAC, or hypothetically speaking, North America.

Function number three is: if there is a competency we could acquire. It could be unique IP in software assets and analytics, and how best to continue to monitor consistent threat levels.

There are new technologies coming out around machine

learning and AI, and those are things we are looking at. We can acquire them as products through service or software providers, or we could make acquisitions that could allow us to leapfrog in a technology space or the service delivery space. If somebody had another cyberdefence centre to do with delivery analysis, that could be an acquisition that could be of interest.

## **How do you think managing SecureLink will differ from your experience with companies like Getronics or IBM?**

I think every company is unique. I don't believe in the management consulting practice of bringing in one template and applying it everywhere. I think even for me, I might have done everything in a nuance somewhere, but the combination of various elements come into play differently at SecureLink. I think here it's having a phenomenal growth market, a company in a

phenomenally relevant and well-positioned value proposition for its clients and with a very strong entrepreneurial heritage.

I think there is also the difference between being a specialist and being a generalist, which most of the providers are. We are a very specialised company with a very specialised service. I think it is an interesting challenge to have, and one that is probably new to me. With IBM it was a huge tanker of a portfolio, with Getronics, it was very broad and it just needed to be made future ready, and here it is a very specialised portfolio. It is about succeeding within very quick customer cycles and keep it at the leading edge.

**“In two years' time I think we are going to see a market that will require us to make significant investments, train our people differently and look at new product fronts – so the security element of security services is tremendously high”**





# THE ELITE: Central and Eastern Europe

## ASSECO

**Revenues: €1.8bn**

Following a common trend among Polish VARs, Asseco also has a thriving vendor business in developing and selling its own software products. With a 4,800-strong R&D team, Asseco spent around €129m on its own IP during 2017, and claims to be Europe's sixth-largest software vendor. The firm works with around 60 IT infrastructure vendors.

Its software arm, Asseco Business Solutions, acquired Polish ERP specialist Macrologic in 2017 for €26.28m. Asseco endured a tough FY2017 where operating profits fell 35 per cent to €72.4m, which VP of the management board Rafał Kozłowski blamed on the firm's partial sale of its share in Formula Systems – a \$1.1bn IT services group based in Israel. Asseco only acquired a 50 per cent stake in the company in January 2016.



**Revenues: €1.5bn**

Claiming to be the 73rd-largest non-public company in Russia and the nation's third-largest IT company, Lanit is the umbrella group of 41 companies employing a total of 9,000 staff. Founded in 1988, the group claims to have more than 2,000 staff certified with more than 250 hardware and software vendors. 2016 revenues reached €1.5bn. The firm has offices in 16 locations across Russia, as well as locations in three Belarussian cities and an outpost in Canada. Its offering ranges from systems and network integration, cloud services, IT outsourcing, business applications, product life cycle management and big data technologies.



**Revenues: €860m**

Although based in Austria, S&T draws most of its business from the CEE region. The firm underwent a transformational 2017 after merging with German IoT manufacturer Kontron, which caused annual revenues to skyrocket by 70 per cent to €860m, while EBITDA surged by 74 per cent to €60m. Kontron entered into talks with the Linz-based reseller after it logged a disappointing 2016 which provided "the weakest in terms of revenue and earnings" since the firm went public in 2000.

S&T is placing big bets on IoT, and almost doubled its IoT Solutions business in 2017 as sales reached €320m. Its more traditional IT services arm meanwhile accounts for the remaining €386.8m in revenues after enjoying a 21 per cent lift in 2017. The firm counts HP, Lenovo and HPE as its top partners, but also works with Toshiba, Samsung, Fujitsu, IBM, Xerox, Cisco and Check Point. The firm also has a software

licensing business, working with Adobe, Microsoft, McAfee, Citrix, Symantec, Trend Micro, Veeam and VMware. S&T has around 3,700 staff, with offices in 16 European countries.



**Revenues: €810m**

This Russian heavyweight was founded in 1993 and is now a \$1bn (€810m) player. Softline offers a crowded portfolio consisting of more than 3,000 software and hardware manufacturers. The reseller specifically targets growth in emerging markets across eastern Europe, central Asia, the Americas, southeast Asia and India, providing everything from public and private cloud solutions to end-point products and software licensing.

Softline claims to have hit an average sales growth rate of 27 per cent over the last 10 years, and serves more than 60,000 customers globally. The Moscow-based firm is present in 30 countries worldwide, including 31 offices in Russia, plus locations in nine European countries.

The VAR was recently welcomed into the Global IT Alliance of fellow Elite player Bechtle. The deal will allow Bechtle to collaborate with Softline on global IT projects. The inclusion of Softline marked the tenth member to the alliance, after Australian VAR Data#3 joined in 2017.



## TECHNOSERV

**Revenues: €690m**

Among the largest systems integrators in Russia, Technoserv works with 72 vendors across Russia, CIS and Europe. Founded in 1992, the Moscow-based firm turned over €690m in 2016 and works across sectors including telecommunications, public sector, oil and gas, manufacturing, transport and financial services. Technoserv has 14 offices across Russia, Kazakhstan, Azerbaijan, Belarus, Uzbekistan and Armenia, hiring around 2,700 staff.



## COMARCH

**Revenues: €240m**

This Polish player has offices in 28 countries worldwide, employing 5,500 staff. Based in Krakow, Comarch has been in business for more than 25 years and bills itself as an ERP business management specialist. It boasts an R&D department through which it has developed its own ERP solutions such as Comarch ERP Altum and Comarch ERP Egeria. The firm has offices in 15 European countries and 84 locations worldwide, and turns over around €240m.





# Q&A: Daniel Olsson

Managing director UK, Soitron

*Founded in Slovakia in 1991, Soitron is now an 800-employee-strong outfit with a presence across seven European countries. UK managing director Daniel Olsson talks us through how Europe's outsourcing market fared last year.*

## How did Europe's outsourcing market fare in 2017?

2017 was quite a challenging year, and actually all the business units we have across Europe have given the same feedback. I believe it was down to market conditions – we had Brexit, and Donald Trump being elected president. I think people were just a bit hesitant, and that affected us. If it is challenging, people put tender opportunities on hold and they are hesitant. That means you cannot pursue opportunities, as people want to wait.

Revenues fell slightly in 2017 due to conservative market conditions. I think also the EU is giving lots of funding to eastern European governments to modernise themselves and some of those funds are starting to run out, so investment in the east has started to fall, which affects all the businesses serving that sector.

2017 was conservative, but 2018 is proving much more bullish. The trend is the same in all seven of our European entities. One thing I can say is our competition from non-European outsourcers is much weaker and their position seems to have weakened. I don't know why this is – maybe it is GDPR related – but for us that is a positive.

## Is there more expansion on the cards for Soitron after setting up shop in the UK?

As the company expanded to the UK we are now a fully functional representation of the group in western Europe, and people have started to discover our capabilities here. That led to us founding Soitron Poland last year, because a lot of our customers want software development which is at the pinnacle of Polish IT resources. We will potentially also establish ourselves in Hungary as well now because it is next to Slovakia and we have some demand there from some major players that are interested in that location.

## You entered a joint venture with UKFast and Secarma last year. How has that partnership progressed going into 2017?

Our venture with UKFast has not continued. We are working more with its sister company Secarma; we work with them around Soitron Connect which is almost like a middleware. But with UKFast, they are a hosting company and we wanted to enable them to industrialise how their customers are on boarded to their environment in a seamless way. They thought that wasn't really needed. In addition, with the ITSN tools we would have liked to industrialise how they do their managed service and support with the experience we have. We thought with Soitron's delivery we would be very strong together, but that fizzled out, so we are looking for new partners in that area.

## What does Soitron Group look like now, and what are your main lines of business today?

Soitron Group is now rather large, with seven countries. Our main source of business is staffing-as-a-service, which is various ways to form resources in eastern Europe working remotely for large corporations. We break outsourcing into three parts: fully dedicated resource, leveraged resource, and staffing-as-a-service which is more transaction-based. Then our second part is ITSM and consultancy services with our new Micro Focus partnership. Countries have slightly different offerings, but the group is working closer together now on a sales level.

**“Revenues fell slightly in 2017 due to conservative market conditions. I think also the EU is giving lots of funding to eastern European governments to modernise themselves and some of those funds are starting to run out, so investment in the east has started to fall, which affects all the businesses serving that sector. 2017 was conservative, but 2018 is proving much more bullish. The trend is the same in all seven of our European entities”**







# THE ELITE: DACH



## Revenues: €6bn

The largest of Europe's Microsoft Licensing Solutions Providers (LSPs), SoftwareONE has 3,000 staff and offices in 82 countries worldwide. The Swiss firm claims to work with more than 9,000 software publishers, but has a deep relationship with Microsoft, and was named the winner of the firm's Volume Licensing Partner Award in 2016. All LSPs have come under pressure over the last few years to move into adjacent product areas as the fees from licence sales continue to shrink. One exec told *Channelnomics Europe* that SoftwareONE would find the transition more difficult than others, as the Stans-headquartered firm has focused firmly on selling software licences for so long. But the LSP behemoth has successfully built a thriving cloud business in the last few years, launching its own automated cloud platform PyraCloud. Adding to its full service offering on Microsoft Azure, SoftwareONE has also expanded its support of AWS by rolling out transaction, billing and migration capabilities on PyraCloud. SoftwareONE sold a 25 per cent stake in the company to investment house KKR in 2015.



## Revenues: €3.75bn

A household name in the IT channel, Bechtle is one of several Germany-based resellers to have seen big growth last year, lifting its share price by 38 per cent in 2017 as a result. The Neckarsulm-headquartered firm boasts a network of 70 locations – or system houses – across Germany, Austria and Switzerland. The firm closed last year with a 15 per cent increase in sales to €3.75bn, while profits jumped by 14.2 per cent to €196m.

Around a third of Bechtle's business comes from outside its German homeland, through system houses in Switzerland, Austria and Belgium, as well as its e-commerce activity across 14 European countries.

The firm hit a €1bn milestone in its public sector business last year, after making a number of big contract wins including a €45m five-year deal with NATO.

Elsewhere, Bechtle has been rapidly growing its workforce in the last few years, with headcount growing nine per cent to 8,353 staff during the course of 2017. The reseller giant has also been hedging its bets on new technologies and revamping its datacentres. Bechtle shelled out €67.2m on such projects in 2017 – almost double the €39.6m spent in the previous year – on initiatives to “ensure its future competitiveness”. These included the launch of its Clouds platform as well as the introduction of a new digital marketplace.

On the M&A front, Bechtle snapped up three small outfits across Germany, Austria and Switzerland in 2017 – the largest of which was €23m Graz-based VAR Ulbel & Freidorfer. Bechtle has also been acquiring in the software space, having swooped on top Microsoft CRM and ERP partners Smartpoint IT Consulting and Acommit.



## Revenues: €2.11bn

One of Europe's largest software asset management (SAM) and licensing specialists, Leipzig-headquartered Comparex has become a global name over the last few years, making acquisitions in the US, Mexico, Brazil, Turkey, Korea and Thailand.

The firm has offices in 25 countries across Europe, employing nearly 2,500 staff. Comparex works with vendors including McAfee, Symantec, Microsoft and AWS, and 2016/2017 revenues reached €2.11bn.

Becoming an even more established global name is firmly on the agenda for Comparex. Its VP for northwest Europe, Maarten van Montfoort, told our sister brand *CRN* that Comparex is looking to shift from a transactional to a contractual model with its customers as a result of shrinking margins in the software resale space. Firms such as Microsoft have imposed a squeeze on rebates and incentives for volume licensing firms such as Comparex, according to Montfoort, which has prompted the firm to throw more weight behind its managed services business.



## CANCOM

### Revenues: €1bn

Another German heavyweight that could not put a foot wrong in 2017. Although Cancom has a more modest geographical footprint than local rival Bechtle, the Munich-based reseller logged an extremely positive 2017, as profits and revenues surged by 16 and 15 per cent respectively. The firm exceeded sales of €1bn for the first time, spurred on by its managed services activities.

Cancom has 2,913 staff across offices in the DACH region – but recently made a return to the UK through acquiring a majority stake in London-based MSP Ocean Intelligent Communications. It previously held several UK offices as an Apple Premium Reseller, but sold off its business to Dorset firm Trams in 2012. General manager Thomas Volk told *Channelnomics Europe* that Cancom's return should not be seen as solely a UK expansion move, since Ocean's customer base is largely international.

Cancom, like other German VARs, has been placing big bets on building a cloud offering, as demand for cloud computing continues to grow in the German market. It logged 21 per cent growth in its cloud solutions segment last year, with the firm vying to continue growing its market share. Read our exclusive interview with Thomas Volk on p11.



## itelligence

### Revenues: €872m

It's no surprise that Germany is one of SAP's most important countries. Founded in Walldorf, Germany represented 14 per cent of SAP's total revenues in 2017, and the software vendor has plenty of committed channel partners in its home

country. All for One Steeb and itelligence are among SAP's most dedicated German channel partners and have built their entire businesses around the vendor's software portfolio. The latter has a total of six global badges with SAP and has been working with the software firm since 1993. SAP's partners have been thriving of late; itelligence closed the books on 2017 with its tenth consecutive year of double-digit growth, as revenues soared 12 per cent to €872m. Operating profits saw more modest growth at 4.5 per cent, reaching €44.1m.

Itelligence employs upwards of 7,000 staff and has offices in 18 European countries, in addition to six outposts outside Europe in Canada, the US, China, India, Malaysia and Qatar.

The SAP partner was acquired by Japanese systems integration monolith NTT Data in 2014 for €149.5m.



#### Revenues: €736m in Germany (€6.8bn globally)

Some €736m of Dimension Data's \$7.5bn (€6.8bn) top line stems from its German operations, according to its financial year ending September 2016. The global Cisco partner is owned by Japanese technology monolith NTT, which also counts NTT Data, NTT Security and itelligence among its subsidiaries. Dimension Data's CEO Brett Dawson stepped down in June 2016 after 12 years of service, to be replaced by COO Jason Goodall. The firm has offices in 58 countries, and around 31,000 staff.



#### Revenues: €578m

2017 revenues soared by 15 per cent for this services and software house. Founded more than 40 years ago in Bremen, Allgeier IT Solutions is certainly one of the largest players in the German market. With around 7,000 staff, its parent company Allgeier SE claims to be one of the largest services outfits to German-speaking countries. Its four divisions have locations across nine European countries, as well as international outposts in Singapore, the US and Mexico.

The Bremen-based firm acquired the European business units of US reseller Ciber at the beginning of 2017, in a transaction worth \$8.8m. The acquired business, which included operations across Germany, France and Denmark, fell under Allgeier's enterprise service division, giving the firm a wider SAP footprint across the continent.

Ciber's remaining US operations went bust just months later, leading to consultancy powerhouse Capgemini placing a €50m bid for the beleaguered firm.



#### Revenues: €281.5m in Germany (€11.7bn globally)

Another subsidiary of Japanese technology giant NTT, NTT Data is a formidable force in the German market, logging revenues of €281.5m in its year ending 31 March 2017. The firm meanwhile logged €64.92m in the UK. Its German arm has eight locations across the country, working primarily with software vendors SAP, Oracle and Salesforce. NTT Data is a \$14bn global powerhouse with around 50,000 employees.



## Exiting the Elite

A number of high-profile acquisitions have taken place in the European channel since *Channelnomics Europe* published the previous *European Elite* report. We've put together a timeline of all the firms that have exited the Elite since last year.





# Q&A: Thomas Volk

*President and general manager, Cancom*

## **Cancom achieved a 7.3 per cent profit margin in 2017 – significantly higher than your competition. What do you put this down to?**

We have our own product called Cancom AHP; an application hosting platform that enables customers to make sure any user in their environment can access any application from any device at any point in time in a fully secure environment. And I mean any application, which also means new applications deployed in the cloud, whether that's Salesforce.com, or Microsoft, or Office 365, but also legacy applications.

That gives us a great edge over everybody in the market because the new concepts we have are enjoying a lot of demand, and we will deploy more.

We are in an environment where you see the market is under a lot of pressure because the reselling and the stack of services around products is becoming more commoditised and there is more competition. So we have invested heavily into managed services and our own product which offers a much higher margin.

We see that part of the business has grown faster, and continuing to invest and build this out will make sure our margin growth will continue to be higher than our revenue growth. We believe

**“We believe we will eventually be a digital managed service provider globally. This will help us achieve our goal of reaching a two-digit profit margin over the next three to five years”**

we will eventually be a digital managed service provider globally. This will help us achieve our goal of reaching a two-digit profit margin over the next three to five years.

## **Cancom returned to the UK this year through acquiring Ocean Intelligent Communications. Why did you expand into the UK market?**

The major change in our business which drives us to become an international player is the fact that unlike reselling product and implementing products and projects for customers

locally, a managed service offering has to be global. If you provide a managed service to a customer, the customer wants the service to be available throughout their company, and not just in one location. That is why we have become multinational, why we have invested in more managed services capabilities abroad, and we see that as the right path for us to actually grow our managed services faster and serve customers better, which will also create more growth. That in turn creates much more profitability for us.

We have to make sure we have these capabilities internationally in order to

manage this environment. If you look at mid-sized companies of 2,000 to 4,000 people, they are typically already in many different countries, they are not just in one location, therefore we have to build a structure to support them.

## **Will your traditional business likely decline as a result of investing in managed services?**

In 2017 we grew our top line by 14 per cent... our traditional business did not grow as fast as some of our competitors did, so that indicates that we have not focused so much in growth in that traditional business. But obviously our cloud business must grow fast.

We position ourselves under the terms of a platform for digitisation, so we say that we are your ideal partner to transform your environment to be ready for digitisation.

In the next three to five years, we think we will reach the €2bn revenue line but our priority is to make sure our profitability or EBITDA reaches €200m, from €85m last year. And we have plans in place to get there.

## **The German economy was particularly strong last year. Is spending likely to slow down this year and into the following year?**

If the market continues to behave like it did last year, then obviously we will see the growth. Recently there seem to be some irritations out there which, when you look at the indicators in the German market, are not all at the highest level. They are getting worse, actually. The public predications right now are all lower than they were a year ago. What that might mean for us, I can't tell you yet, but obviously this is a potential indication that investment cycles and willingness on the customer side may be reconfigured. We don't know yet. But those signs and irritations in the market – we all know about – and we will have to work through them.







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# THE ELITE: France and Southern Europe

## sopra steria

**Revenues: €3.85bn**

Sopra Steria is one of several IT services and systems integration players based in France. Headquartered in Annecy, Sopra Steria employs close to 42,000 staff across more than 20 countries worldwide. 2017 sales reached €3.85bn while operating profits increased nine per cent to €261.7m. The firm's international business has been developing nicely over the last few years, with each of its European entities – across the Nordics, DACH, Benelux and Italy – seeing a 12 per cent year-on-year revenue increase, with each country hitting at least 10 per cent growth. The UK, however, proved Sopra Steria's weak point in 2017, as revenues fell by 13.6 per cent annually throughout the year to €801.7m. The firm attributed the poor performance to a contract with the UK Cabinet Office which it claims is going through a "transitional phase" that is likely to continue into the first few months of 2018.

Sopra Steria is launching a cost-cutting programme to take around €20m out of its outgoings for this year as the firm simultaneously looks to expand its private sector customer base and grow its consulting business and sales teams.

Like many France-based resellers, growing outside its home country has been a priority for Sopra Steria. The firm has acquired across France, Sweden and Germany in the last nine months.

Sopra Steria pushed €1.6bn in revenues through the French market in 2017. Key partners include AWS, Oracle, Alfresco, Microsoft and Red Hat.



## econocom

**Revenues: €3bn**

Although headquartered in Brussels, this VAR draws more than half of its total €3bn in revenues from the French market. 2017 proved a busy year for Econocom, as the firm was one of the most aggressive consolidators in the European market over the course of last year. Econocom snapped up a total of seven companies across the UK, Germany and France during 2017 – the largest of which were 220-employee-strong multimedia integrator BIS Group and €85m-turnover Nozay-based firm Aciernet.

The firm employs 10,356 staff across locations in 12 European countries in addition to offices outside Europe in Mexico, the US, Brazil, Morocco and Canada.

Econocom plans to gain bulk in its European business, particularly in the UK and Germany, with the goal of adding €1bn to its top line and doubling its operating income to €300m by 2022.

More M&A is in the pipeline for the firm in an effort to continue to grow its services offering, which reached a third of sales in 2017. Future acquisitions are expected to lean towards consulting, data analytics and IoT specialisms.

Several of Europe's largest channel partners have undergone

a change of leadership of late, and Econocom is no exception. CEO Jean-Louis Bouchard announced plans to step down in March, with his son, Robert Bouchard, taking his place with immediate effect. Robert was promoted to COO in the middle of 2017 after the departure of Bruno Lemaistre.



## indra

**Revenues: €3bn**

Probably Spain's largest IT services outsourcer, Indra has 40,000 staff across 48 countries worldwide, including 17 in Europe. Indra hit revenues of €3bn in 2017, while EBIT margin grew by half a percentage point to 6.5 per cent. Indra has a product portfolio with almost 300 vendors.

Indra made one of Europe's largest channel acquisitions in 2016, when it signed a €305m deal to acquire €400m-turnover competitor Tecnom to create "the leader in IT services in Spain". Tecnom offers outsourcing, mobility and digital transformation services to financial and banking organisations across Iberia, the US and Latin America.

The acquisition lends leverage to Indra's strategic plan to move towards higher-value product areas after the firm suffered a bruising 2015 which saw operating margins fall from 6.9 to 1.6 per cent. The Madrid-listed firm underwent a year-long restructure, as it cut 2,700 employees and stepped away from some major projects in South America.

At Indra's annual shareholders meeting last July, chairman Fernando Abril-Martorell said that it is now "at a turning point" which symbolises a "new stage" for the firm, as Indra engages in new technologies such as automation and artificial intelligence.



**Revenues: €1.13bn**

With 16,000 employees and operations in 20 countries worldwide, Gfi Informatique is one of the biggest players in Europe as well as one of the most ambitious.

Based in Saint-Ouen, Gfi Informatique is in the middle of making what is one of Europe's biggest VAR acquisitions in recent years, when it signed a conditional takeover bid for Belgian VAR Realdolmen. The all-cash transaction is worth €198m, a 28 per cent premium on Realdolmen's average share price over the six months prior. Realdolmen has six offices across Belgium and Luxembourg, boasts a headcount of 1,200 staff, and logged 2016 revenues of €236.2m. The deal would add 1,000 Benelux customers to Gfi Informatique.

Spain and Portugal have otherwise been major expansion targets for Gfi Informatique in the past. Its international revenues surged by 58 per cent year on year in 2017 off the back of two sizable acquisitions across the two countries

– 800-employee-strong SAP partner Roff Group and 750-employee-strong consulting outfit Efron.

The blockbuster acquisition of Realdolmen represents Gfi's long-held ambition to become an international brand. Qatari conglomerate Mannai Corporation bought up a majority stake in Gfi in 2015, and pledged to grow the firm's presence in EMEA.

But Gfi's French business is still its main sales engine. The VAR claims to have 40 offices in France, including 17 sales branches. Its French business accounted for €842.9m of its €1.13bn in group sales in 2017.



**Revenues: €1bn**

Although IT services are not SPIE's main area of business, the firm still generates around €1bn of its total revenues of €5bn through its ICT Services arm. SPIE boasts a workforce of more than 38,000 staff across 600 offices in 38 countries worldwide.

2017 was a record year for bolt-on M&A transactions for SPIE, as the firm snapped up 11 companies with total annual revenues of €321m throughout the year. At the start of 2017, SPIE acquired former Elite member Systemat, a €70m-turnover Belgium IT infrastructure provider with around 150 staff. The deal represents SPIE's debut in the Belgian IT market. Systemat had previously sold off its Microsoft licensing business with 130 customers to US reseller Insight.



**Revenues: €268m**

This Milanese systems integrator is Cisco's third-largest partner in Italy and generated around €35m sales with the vendor last year. The firm has 13 offices across Italy and turned over €268m in 2017, an impressive 51 per cent increase on the year before. Along with holding Gold status with Cisco, Lutech's main partners include Oracle, Dell EMC, NetApp, Check Point, Fortinet and Forcepoint.

Lutech was acquired by private equity house One Equity Partners (OEP) in July, and general manager Alberto Roseo has since told *Channelnomics Europe* that the new investor will fuel a European expansion drive that will see the firm embark on an M&A spree across Europe. Since OEP has a European outpost in Frankfurt, Germany will be Lutech's expansion priority, according to Roseo. The Milan-based firm

is looking to acquire in fields such as IoT, CRM and big data.

The long-term goal is to create a €500m company, according to Roseo, an achievable target considering that Lutech has more than doubled its revenues in the last four years. Read more from Roseo on p15.



**Revenues: €240m**

Probably Italy's largest pure-play reseller, VAR Group boasts a headcount of 1,600 staff across 23 locations in its home country. Based in Florence, this reseller claimed to have reached €240m in sales for its financial year ending 30 April 2017, with 18 per cent of sales stemming from managed services. VAR Group claims to have 796 vendor certifications under its belt, including Titanium status with Dell EMC, Gold status with Cisco and Oracle, and Platinum with HP, HPE and Lenovo.

VAR Group is wholly owned by SeSa, an Italian technology company that is also behind €1.1bn-turnover distributor Computer Gross.

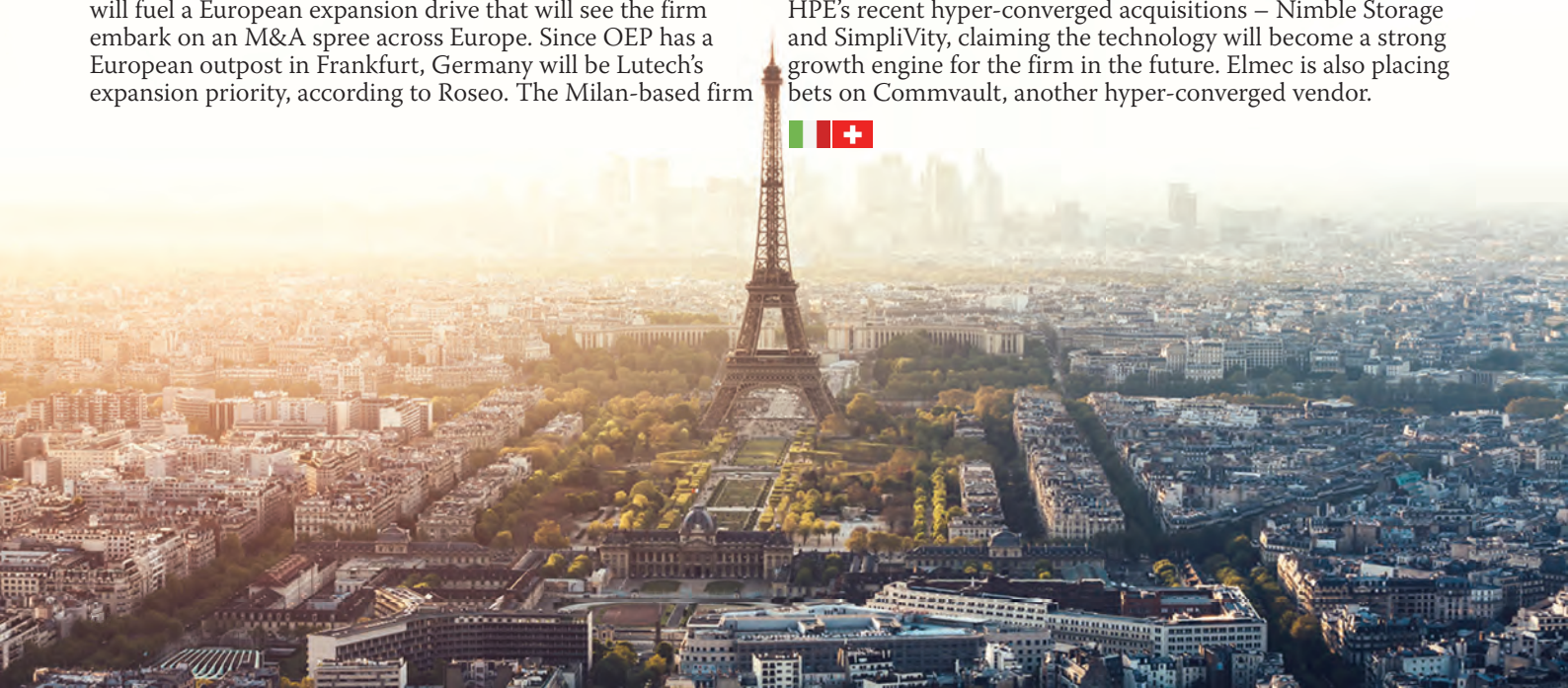
Like many resellers across Europe, VAR Group has been making efforts to invest in its own intellectual property. The firm acquired an ERP software called Panthera from Italian telecoms provider Infracom. VAR Group claims the deal will strengthen its position as a provider of management solutions for SMB customers.



**Revenues: €182m**

Having been in business since the early 1970s, Elmec sealed a partnership with IBM in the early 1980s and began selling the vendor's early PC models. Now, the Lombardy-based firm offers managed services in networking, infrastructure, printing and end-user computing. It even opened a new Tier IV datacentre in 2015 in Brunello. Elmec operates across seven branches in Italy in addition to a subsidiary in Morbio, Switzerland. The firm turned over €182m in 2016 and employs around 600 staff.

Elmec's chief technology officer Marco Lucchina recently told *Channelnomics Europe* that he is a strong advocate for HPE's recent hyper-converged acquisitions – Nimble Storage and SimpliVity, claiming the technology will become a strong growth engine for the firm in the future. Elmec is also placing bets on Commvault, another hyper-converged vendor.







# Q&A: Alberto Roseo

*General manager, Lutech*

**Sales at Lutech reached €268m in 2017, 51 per cent higher than the previous year. Where did that growth come from?**

We acquired a company called Sinergy last year, which is also an integrator, but focused on the infrastructure market. It is very focused on the datacentre and security, so very complementary for us, as you know we are very strong on the networking and security side.

We consolidated the security and we added the datacentre business to our competencies. The platform for the next-generation infrastructure, as we call it, now has revenues of €160m out of the €260m of the Lutech Group.

**"I think the Italian market is getting better compared with the last few years. We had very positive signals last year and this year will be even better from our perspective. Infrastructure, datacentre, networking and security are going very well"**

**How did organic growth compare with revenue gained through acquisition?**

We had also organic growth of around 18 per cent, but the major growth was through acquisition. We also acquired a company two weeks ago called Nest2. It is a €20m company focused around managed services and is a big operating centre working on networking and security.

It is part of the strategy we defined with One Equity Partners when it acquired us last year to grow revenues to €500m.

**Can you say a bit more about Sinergy, and how it will complement Lutech's current offering?**

Sinergy is in the Italian market, also based in Milan, and has offices in the north and central territories of Italy. It is very specialised in storage and datacentre, and is the major partner for NetApp in Italy. And together with them we are now the major partner for Dell EMC in Italy.

Sinergy's revenues are about €70m with 160 people. We were already in the datacentre space, but it wasn't as important as our networking which is our core competency. We have been working with Cisco since the year 2000, so we are one of the major partners for Cisco in Italy.

**You have been planning to enter the German market since you were acquired by One Equity Partners last year. Are you any closer to setting up shop in Germany?**

We are having some conversations with some companies in the German market. One Equity Partners is American, but it has a presence in Frankfurt for European activities. In Germany they are supporting us to have some conversations with some potential companies to acquire or to merge with.

**How would you describe the health of the Italian channel?**

I think the Italian market is getting better compared with the last few years. We had very positive signals last

year and this year will be even better from our perspective. Infrastructure, datacentre, networking and security are going very well. We also started to work with cloud and applications such as CRM and big data analytics. For cloud, we work with Microsoft, Google and Amazon and with applications we are working with Salesforce and ServiceNow. They are very recent relationships.

**Italian VARs have historically struggled to expand outside their home territory. Why do you think this is?**

I think that because of the organisation of the vendors, it is easier to expand outside Italy if you're more of an application and services company than a product company. If you go

outside your country to sell product, you cannot sell Cisco, for example, in Germany. You have to build a relationship with Cisco and build partnerships in the German market first. Therefore it is much easier to have your product or services in a nearshore model.





# THE ELITE: Nordics

## ATEA

**Revenues: €3.4bn**

The undisputed kingpin of the Nordic and Baltic regions, Atea claims to account for 18 per cent of the market in the seven countries in which it operates. Its top 10 strategic vendor partners include Apple, Citrix, Cisco, Dell EMC, HP, HPE, IBM, VMware and Lenovo. CEO Steinar Sønsteby, however, told *Channelnomics Europe* that Atea is currently generating the most revenue with Microsoft.

Atea comprises nearly 7,000 staff across 90 locations selling a full range of hardware, software and services to customers. Today, just over half of Atea's total revenues stem from hardware sales, down from 90 per cent around 10 years ago, with about 25 per cent now being driven through services.

Atea has historically been a major consolidator in the Nordic market, snapping up more than 50 firms in the last 12 years. But the Oslo-based firm's M&A tally has slowed of late, with CEO Steinar Sønsteby telling *Channelnomics Europe* that Atea is stepping away from acquiring for market share or geographic expansion. Future M&A will be around growing Atea's technology portfolio in networking, IoT and data analytics, Sønsteby said.

The VAR has seen big growth across all its geographical segments, with 2017 revenues swelling by four per cent to NOK 32.4bn (€3.4bn) and sales hitting €1bn for the first time in its closing quarter.

Despite exhibiting big growth, Atea's Danish business, its second-largest region by revenue, has been dragging on the firm's financial performance for some time. In its most recent quarter, Danish profits nosedived by 21 per cent, while revenues dropped by eight per cent.

A police investigation into alleged unethical activity between three senior Atea Denmark employees and two public sector customers was opened in June 2015 after customers allegedly received bribes from Atea employees.

Sønsteby, who became CEO in 2014, has admitted that the drawn-out investigation has stunted progress for Atea Denmark, but has since put measures in place to bring the region back to growth. The firm attained an anti-bribery certification – ISO 37001 – at the end of 2017 in an attempt to put to bed customer and partner concerns of unethical activity. Sønsteby has also imposed a hiring freeze on its Danish operations, reducing its headcount by almost 100 employees during the course of last year, in an effort to save around DKK 12m (€1.6m) each quarter and hit an EBITDA margin of five per cent.



## tieto

**Revenues: €1.5bn**

2017 was something of a transitional year for this IT services giant. Tieto rang in the year with a series of job cuts in its Finnish homeland. Up to 250 staff were at risk of losing their jobs, with up to 180 cuts being made to its Technology and Services Modernisation arm. The cuts were part of Tieto's "automation and efficiency" programme, which aimed to create €40m in annualised growth savings and add €20m to the cost base of 2017.

The restructure tore a €13.5m hole in its profits for the first quarter of 2017, which fell by 18 per cent year on year to €25.6m. Fast-forward to the final quarter of 2017, and the Espoo-based firm's fortunes seem to have turned around. A €47.9m acquisition of Swedish consultancy firm Avega Group edged revenues to a 1.5 per cent increase in Q4 as sales reached €408.6m.

Listed on NASDAQ in Helsinki and Stockholm, Tieto employs around 7,000 of its 14,000 staff in Finland, Sweden and Norway, but also has outposts in Austria, Denmark, Estonia, Latvia, Lithuania and Russia. The firm also utilises global services delivery centres in the Czech Republic, Poland, India and China. Sales were €1.5bn in 2017.



## Dustin

**Revenues: €893.2m**

Claiming to be the largest e-tailer in the Nordic market, boasting a catalogue of about 250,000 products from 2,500 vendors, unlike many channel firms, Swedish firm Dustin does not shy away from being labelled as a "reseller". Dustin employs roughly 1,000 staff across its four locations in Denmark, Sweden, Finland and Norway, and pushes around half of its SEK 9.31bn (€893.2m) revenues through its home market.

Dustin acquired three firms in its 2016/2017 financial year ending 31 August, adding 100 employees to the group – Norwegian SMB resellers IKT Gruppen and Malmö-based Saldab IT, in addition to backup and storage partner Purity IT.

The reseller has continued its M&A momentum, and snapped up three companies during the three months ending 30 November. It expanded its hosting and outsourcing capability by buying up Danish firm Norriq for SEK 216m, as well as datacentre player Core Services in Norway and AV specialist JML-System in Sweden.

The reseller also announced that long-standing CEO Georgi Ganey would step down at the end of 2017 to be replaced by Thomas Ekman, who said Dustin is "well equipped" for further expansion both organically and through acquisitions.



## Crayon

**Revenues: €630m (approx.)**

This Norwegian software asset management (SAM) specialist has undergone something of a transformative 12 months. Under the ownership of equity firm Norvestor, Crayon has doubled its headcount and poured €30m into geographic expansion during its five years as a private company after delisting from the Oslo Stock Exchange in 2012. But in October 2017, Crayon announced its intention to return to the same stock exchange in order to free up NOK 300m (€32m) into fuelling further growth.

Speaking to *Channelnomics Europe*, CEO Torgrim Takle said Crayon had become too large for Norvestor to manage, and that the IPO will help the SAM specialist acquire companies with attractive IP to add to Crayon's global



platform. At the time, Syversen added that Crayon will also look to reach critical mass in the Netherlands, France, Germany and the UK as part of its growth plans.

Crayon's business has been built on selling Microsoft licences since it was founded in 1999. Although Microsoft remains Crayon's largest partner, the firm has since started working with AWS and recently signed on with Google last year to complete the tripartite of public cloud vendors. Syversen told us that he expects AWS to become a major part of its cloud revenues in the next few years.

The firm employs 1,100 staff worldwide across 13 European countries, as well as locations in North America, South Asia and the Middle East. Revenues stand at around €630m.



# PROACT

Revenues: €310m

Datacentre and cloud specialist Proact has been riding a wave of success over the last couple of years. In 2016, the firm attained its long-held ambition of reaching a five per cent pre-tax profit margin after profits rocketed by 70 per cent to SEK 49.7m (€5.25m) in its fourth quarter of 2016.

2017 has seen similar fortunes for the pan-European integrator, as EBITDA ballooned by 15 per cent to SEK 220.2m, while revenues shot up by 12 per cent reaching SEK 3.26bn.

Proact's CEO Jason Clark, however, promptly resigned at the start of this year with vice president of professional services Peter Javestad filling in as acting chief executive. Proact has still not found a replacement following Clark's departure.

Services now make up around a quarter of Proact's total sales as the firm continues to invest in cloud offerings. Proact employs more than 800 staff in 15 countries across Europe and North America.







# Q&A: Steinar Sønsteby

Chief executive, Atea

## How would you describe the health of the IT channel in the Nordics and Baltics?

A couple of years ago I started to be more optimistic – really optimistic – on the IT market in general, but also the role of the channel. I said many times in my quarterly presentations that I thought IDC was under-representing the market and the health of the market when it was predicting the future. It looked to me like they were looking in the rear-view mirror and the future, I think, will be much better.

I think that's exactly what we have seen, especially in the last year. Not only in the Nordics and Baltics but all around the world. You see Bechtle and Computacenter and all these guys do really well and we are no different from them. I think for the next couple of years we will continue to post double-digit growth.

This is not usual in any industry when you have companies that are the size of Atea, Bechtle and Computacenter. I think there is something particularly interesting about the IT market in general. We are really at the centre of interest for everybody: for politicians, for business leaders, for public employees. Every single problem that anyone has – or every single opportunity that someone wants to cash in on – is going to be solved by technology and – more specifically – IT technology.

## Do you think the channel has a role to play around emerging technology such as data analytics, AI and machine learning?

My way of trying to start a conversation with a customer these days is by asking: 'what is your data strategy?' There is no point in data if you cannot analyse it. So BI or analytics, or whatever you want to call it, is really necessary and has already started to be used in the channel, but it is mostly something that is in front of us. Following on from this, AI or machine learning and the automation that gives data more intelligence is going to be part of that.

I think the channel has a role in that and I think we will also have a role in artificial intelligence. But having said that, there are parts of that market which for a long time will be more about what the vendor does direct with certain customers. For instance with IBM's Watson, which looks for cures for cancer, that is not something in which a channel partner necessarily has a role. But when Watson starts to be used in security, analysing threats, all these things, that is when the channel partner really needs to be in place because – if not – IBM will not be successful.

## Let's talk about your business in Denmark. You launched a programme to bring the region back to growth at the beginning of the year. How is that going so far?

We have put in place a new structure and organisation, and new measures for people to be more focused

on the customer and the customer journey rather than certain specific technologies. If we become too focused on the technology and not on the needs of the customers, then our role becomes less important because there is already a producer that knows more than us about the technology.

We have changed that structure in Denmark. They were kind of stuck a little bit in what I would call an old VAR landscape. We have started to see positive developments in how we work with vendors on one side and customers on the other side. But there is still a way to go to say whether we are on track to where we want to be; it is a little bit early to say. I have said to the financial market that I hope to see clear signals of improvement in Q2, but we expect to see it in Q3 and Q4.

## Who do you consider to be your main competitors? Do you go up against other larger resellers such as Dustin?

We don't consider Dustin a competitor; Dustin is a pure product mover. We are in the same geography, but we are trying to solve completely different tasks. I think Dustin needs to massively invest in the future if they're going to move their business away from a pure price or product focus.

Really, the competitors we encounter most are a lot of smaller local players – in southern Sweden or northern Norway or places like that. It is sometimes even more local than that. And there are a ton of them because the market is still way too fragmented. I don't think it's good for the customers to have a lot of companies with fewer than 25 employees running around saying they can solve anything in the world, because they can't.

I would often say when I speak internally that we are our own biggest enemy. When we line up the best people to do the job, we win. So when we do not win, it is because we don't offer our best effort or best people, and that is our own fault and not our competitors'.

## You claimed to reach 18 per cent market share in 2017. Do you think you will continue to grow your share across the Nordics and Baltics this year?

We think we will get to 20 per cent market share by the end of this year. That is our target. Right now we are growing faster than the market so I think we will get very close.

New technologies are constantly being developed. So, being the biggest, we have the advantage of not having to go to new customers to grow fast because we can take new stuff to known, existing customers. Widening our share of wallet is more our growth strategy than reaching new customers. Of course, we welcome new customers but we are

not investing massively in new customers because we have 5,000 in the Nordics that are buying something from us and very few buy everything from us.





# THE ELITE: UK and Ireland



## Revenues: €4.29bn

With group revenues of £3.8bn (€4.29bn), Computacenter is the UK's – and Europe's – largest reseller, with more than 14,000 employees globally. The bulk of Computacenter's business stems from its operations across the UK, France and Germany – the latter of which has been stretching ahead of its domestic operations for some time. 2016 proved a challenging year for the UK arm of the Hatfield-headquartered firm, as adjusted revenue dipped by one per cent to £1.39bn, while its overseas business went from strength to strength. 2017 proved more positive for the channel bellwether, but Germany continued to stretch further away from its domestic arm, growing 15.5 per cent to just under €2bn, driven by a strong supply chain business that jumped by 28.5 per cent. Computacenter's French arm has similarly outpaced the UK as sales grew by 13 per cent to €581.3m.

CEO Mike Norris has frequently expressed his mistrust of buy-and-build growth strategies, and Computacenter has historically been relatively tame on the M&A front as a result.

The firm has, however, made a couple of small acquisitions, including UK ServiceNow partner TeamUltra, and has also expanded organically over the last 12 months. The firm announced plans to open an Irish office towards the end of last year as a consequence of Brexit, and intends to open a Polish services centre in July to support its German business.



## Revenues: €1.97bn

Although based in the UK, SCC's French operation takes the largest share of the Birmingham-based firm's turnover, contributing €1.2bn of its €1.97bn in revenues. That being said, most of SCC France's business (85 per cent) comes from product sales, whereas the reseller's UK business has made a big push to grow its services capabilities in recent years.

As a result, SCC UK's top line has been steadily contracting while profits have continued to expand. FY2017 sales fell by eight per cent to £602m, while EBIT surged by 21 per cent to £17m. Now services represent as much as 32 per cent of SCC's total company turnover – an 88 per cent rise over the last three years.

Datacentre and print services have been at the vanguard of promoting SCC UK's new revenue and margin mix, with the former growing by 29 per cent year on year in 2017.

SCC France naturally sees lower returns on sales as a result, with EBIT hitting just €11.9m in 2017. CEO James Rigby, however, has told *Channelnomics Europe* that he is taking steps to change this, and has been gradually growing its services proposition throughout the course of the last two years. In April 2016, SCC acquired Flow Line Technologies, a datacentre services firm operating in Paris and Lyon. Similarly, the firm made steps to ramp up its in-country service desk presence with a new facility in Valenciennes. SCC France's general director Didier Lejeune told us that the 1,000 square metre facility will eventually boast a headcount of 300 employees as the firm looks to improve services support for key public, insurance and banking sector customers.

The new services centre will add to current locations in Paris, Romania, and a recent expansion in Vietnam. The Romanian facility has a headcount of around 1,000 staff.

Lastly, SCC Spain generates revenues of €68m, with around 70 per cent of its business being driven through product sales.

SCC has 40 offices across the UK, France and Spain and a headcount of 5,500 employees when factoring in its global delivery centres in Romania and Vietnam.



## Revenues: €1.15bn in EMEA (€6.7bn globally)

EMEA represents 20 per cent of Insight's \$5.67bn in net sales, with a whopping 77 per cent coming from its North American business. The profitability of the NASDAQ-listed firm's EMEA business has been a priority for CEO Kenneth Lamneck during 2017. The reseller incurred €3.2m in restructuring costs to tackle "inefficiency" in its European operations, which dragged EMEA to a \$1.13m loss in its first quarter of the year.

The restructure failed to alleviate financial pressures in the second half of 2017, however, despite assurances made by CFO Glynis Bryan towards the start of the year. Operating profits again tumbled by 23 per cent in Q4 to \$7.1m (€6.03m).

Insight's services arm has, however, been steadily growing in 2017, posting 25 per cent growth to €33.3m in Q4 – now a tenth of total EMEA revenues. The firm's acquisition of Dutch Microsoft partner Caase.com nudged along Insight's services business, which EMEA boss Wolfgang Ebermann described as a vital digital transformation play.

UK revenues represent the bulk (45 per cent) of Insight's total EMEA business, which generated sales of \$1.36bn in 2017. Insight Germany, which trades as Insight Technology Solutions, meanwhile produces around €115m in sales, according to 2016 accounts. Read our Q&A with Insight's UK boss Emma de Sousa on p21.



## Revenues: €964.1m

Another European reseller that has just undergone a change of CEO, Softcat saw Martin Hellawell step into a non-executive chairman role on 1 April as distribution veteran Graeme Watt assumed the hotseat at one of the UK's fastest-growing resellers. The Marlow-based firm floated on the London Stock Exchange in November 2015, and recently celebrated its first full year as a public company with a 24 per cent hike in revenues to £832.5m, and a 10 per cent increase in operating profits to £51.5m. The firm's market valuation has more than doubled since going public. Softcat's market capitalisation even overtook UK rival Computacenter's recently, reaching £1.34bn to Computacenter's £1.32bn, despite the latter's headcount being five times larger, and its revenues more than three times the size of Softcat's.

The reseller only recently revealed its ambition to take its first step outside the UK market and open up shop in Dublin.

Softcat works with around 60 vendors, counting the likes of



HP, Microsoft, Symantec, Dell EMC, Cisco and Apple among its main strategic partners. The firm boasts a headcount of 1,027 staff across seven UK offices.

Hellawell has long been a proponent of sticking to Softcat's tried and tested business model of hiring graduates into its sales team and gradually stepping into new technology areas.



### Revenues: €811.4m

One of the UK's most aggressive buy-and-build VARs, Lancashire-based IT, telecoms and cloud provider Daisy has grown from a sub-£100m SMB telecoms supplier to a £700m giant through a number of blockbuster acquisitions including Damovo, Phoenix IT and Alternative Networks. Daisy valued Phoenix IT at £135m and Alternative Networks at £165m.

M&A has weighed somewhat heavily on Daisy's balance sheet, posting an operating loss of £14.7m for the year. Muller told our sister publication *CRN* that Daisy will take a break from M&A and concentrate on reaching its £1bn revenue goal through organic growth.

Rumours have been circling around Daisy for some time, as various reports have suggested that the firm is looking to put itself up for sale after appointing UBS and Oakley Advisory to lead the process. Daisy was founded by Matthew Riley in 2001, and floated on the London Stock Exchange in 2009 before being taken private again by a group of investors in 2015.

Chief executive Neil Muller pegs Daisy's IT infrastructure and connectivity operations at £170m a piece, its mobile business at £150m, voice at £130m and business continuity and cloud at £80 to £100m.

Daisy claims to have more than 35 locations across the UK and a headcount of around 4,000 employees nationwide. It works with around 65 technology vendors and telecom operators. The firm is a Cisco Gold partner, and holds top badges with Avaya, Mitel, Juniper, NetApp, HP and Microsoft, among others.



### Revenues: €737.1m (UK only)

US reseller heavyweight CDW landed in the UK relatively recently, and did so in style by buying a 35 per cent stake in £500m-turnover reseller Kelway in 2014, before scooping up the remaining 65 per cent the following year. Now CDW is a £648.6m beast across the Atlantic, after its UK arm enjoyed a bumper 2016, as revenues grew 14 per cent pro rata based on the nine months ending 31 December 2015.



## CAPITA

### Revenues: €714.85m

With 73,000 employees worldwide and £4.9bn in revenues, London-listed Capita is one of the UK's biggest IT services providers. The relevant IT arm of this public sector leviathan – Capita Enterprise IT Services – reached revenues of £616.7m in 2016. But the public sector outsourcing giant has drifted into rocky waters of late, as Capita's share price

spiralled by 43 per cent after its newly appointed CEO Jonathan Lewis openly outlined the firm's shortcomings. Lewis said Capita's structure is "too complex", "driven by a short-term focus" and "lacks operational discipline and financial flexibility", in his damning report in January.

He also said the firm has put too much emphasis on M&A. It shelled out £57m for public sector VAR Trustmarque in 2016 and networking firm Electranet in 2015.

Capita considers Cisco, EMC and Microsoft as its top vendor partners, but works with 19 other manufacturers including Lenovo, Apple, Toshiba, Avaya, SAP, HP and Citrix.

Its Enterprise IT Services arm has more than 4,500 staff across 50 sites in the UK, Ireland and India.



### Revenues: €392.4m in Europe (€1.5bn globally)

Although this systems integrator's parent company Datatec is based in South Africa, Logicalis has its headquarters in the UK. Thirty-one per cent of its €1.5bn revenues stem from Europe, according to 2017 accounts, totalling €392.4m. The firm has endured difficult times on its home soil, as revenues for the year ending 29 February 2016 fell from £169.8m to £153.9m, and operating profits sank from £6m to £2.1m into the red. UK MD Bob Swallow, however, claims he is confident of returning its domestic operations to growth.

Its German business – largely founded on its acquisition of integrator Inforsacom in 2014 – is faring much better than its UK counterpart. Germany CEO Christian Werner has told *Channelnomics Europe* that he is aiming for revenues of €250m in the next two years – up from €185m in fiscal year 2016 – which would propel the firm into the country's top 10 IT service providers. Inforsacom finally fell under the Logicalis brand this year, and Werner has been busy expanding its German offices and hiring external specialists to assist existing sales staff (see Q&A on p25 for more).



### Revenues: €363.7m in the UK (€8.4bn globally)

With reported revenues of around \$10bn and 4,000 staff globally, World Wide Technologies is a Dell EMC Titanium Black partner and Cisco's number one partner in the US and number two globally. The firm touched down in the UK around five years ago, and the country is by far its largest business unit in Europe, with revenues of around £320m according to *CRN* market sources.



### Revenues: €284m in the UK (€8.52bn globally)

Global Microsoft licensing partner SHI has been in EMEA for around 20 years. With around 130 staff in the UK, this New Jersey-based reseller has big ambitions to grow its UK footprint in the mid-market space, according to UK boss Darren Brodrick. The entire group has around 3,500 staff and generates \$7.5bn in revenues globally. Its UK business has a revenues run rate of £250m, according to market sources from our sister brand *CRN*.







# Q&A: Emma de Sousa

*Managing director, Insight UK*

**Insight's EMEA services business grew nicely last year. What do you put that down to and what have you invested in from a UK perspective?**

If I talk about the UK specifically, we've invested in the last few years in creating a sales structure close to our clients. Now more so than ever before, we have salespeople in the field. We segment our business in some instances by size and other instances by vertical. So we've spent a lot of time investing in our people and the new people onboard to have a greater presence in the field.

Because, if you're really going to get close to your client and understand their true business challenges, it's not a conversation you want to have over the phone – you want to sit down and talk face to face. So we've invested in a transformation of our sales organisation in that way, giving them more face-to-face time with their clients. As a result of that we've got to know our clients better and consequently we've made smarter investments in the areas around services and solutions that make a difference to our clients today.

**Insight CEO Kenneth Lamneck is putting a big emphasis on improving profitability in EMEA in 2018. How are you driving efficiency in the UK?**

There are two ways to improve profitability. One is to improve efficiencies and take costs out of the organisation, and the other is to make sure you are focused on the right things that deliver value to the clients and improve your profitability.

So in the UK, we are continuing to invest in our business, but we are investing in areas such as cloud and services which help us to help our clients market it and, as a result, improve our profitability.

**How would you describe the health of the UK channel today? Which technology areas do you think will prove particularly lucrative for the channel in 2018?**

I think it's a really fantastic time to be part of the channel in the UK. I feel very optimistic. Obviously, there are some economic questions and still lot of uncertainty around Brexit and so on, and nobody knows quite what the impact that will be, but I think the channel is very buoyant. It's constantly changing and evolving – that traditional supply chain channel is turning into something much more dynamic.

Partner-to-partner relationships are becoming more critical, and all that is continuing to help us drive and grow. If we look at the world today, every organisation is a tech organisation and every CIO I talk to is under pressure from their chief executive to leverage all their IT to help them digitally transform their business. They need help from organisations such as Insight and our partners in order to succeed and grow, so I feel very optimistic about the channel right now.

**“If we look at the world today, every organisation is a tech organisation and every CIO I talk to is under pressure from their chief executive to leverage all their IT to help them digitally transform their business”**





# Europe's ones to watch

*There are thousands of resellers in Europe, but a handful have particularly grabbed our attention over the last year. The firms featured here have either enjoyed lightning financial growth in the last few years, are on hugely ambitious growth trajectories, or have declared plans to grow their geographic footprints – or all of the above*



Sales rocketed by 76 per cent to £46m (€52.4m) in 2016 for this UK-based public cloud provider. The firm landed investment from Blackstone at the start of last year which the London-based cloud specialist intends to put towards expanding its geographic reach.

And it didn't take long for the firm to begin its growth into new markets. It opened an outpost in the US in Dallas later that year. That organic expansion was soon followed up by the acquisition of US cloud migration platform Cloudamix and US professional services outfit Emerging Technology Advisors. Cloudreach says that this isn't the end of its M&A ambitions, with Europe boss Chris Bunch claiming that more buyouts are on the cards this year.

Cloudreach is now present in seven countries worldwide: Germany, the Netherlands, France, Canada, the US, Switzerland and the UK.

Google Cloud, Microsoft and AWS make up Cloudreach's public cloud portfolio.



**Business and technology working as one (Germany)**

Logicalis' more established UK business has endured a tough time of late – with revenues falling by nine per cent to £153.9m (€174.7m) in its 2016 year. While its UK business has been shrinking, its German arm – based largely on a 2014 acquisition of local integrator Inforsacom – has gone from strength to strength.

In fact, CEO Christian Werner has vowed to bring Logicalis Germany into the ranks of the top 10 IT services firms operating in the German market. The firm is shooting for €250m in revenues by 2020, up from around €185m in 2016. Alongside ambitions to boost its top line, Logicalis Germany has been busy expanding its current offices or moving into larger ones. Staff in Berlin, Stuttgart and Düsseldorf were moved into a larger office in 2017, while its Frankfurt HQ was expanded. The plan was to add 50 new staff to Logicalis Germany, according to Werner, who claims that the firm is competing with vendors such as Oracle when it comes to hiring new talent.

Taking into account that Logicalis Germany rebranded this year – which saw it finally drop the Inforsacom name almost four years after being acquired by Logicalis – and a management rejig undertaken to improve speed and efficiency, the firm appears ready to pursue its €250m ambition. Read our interview with Werner on p25.



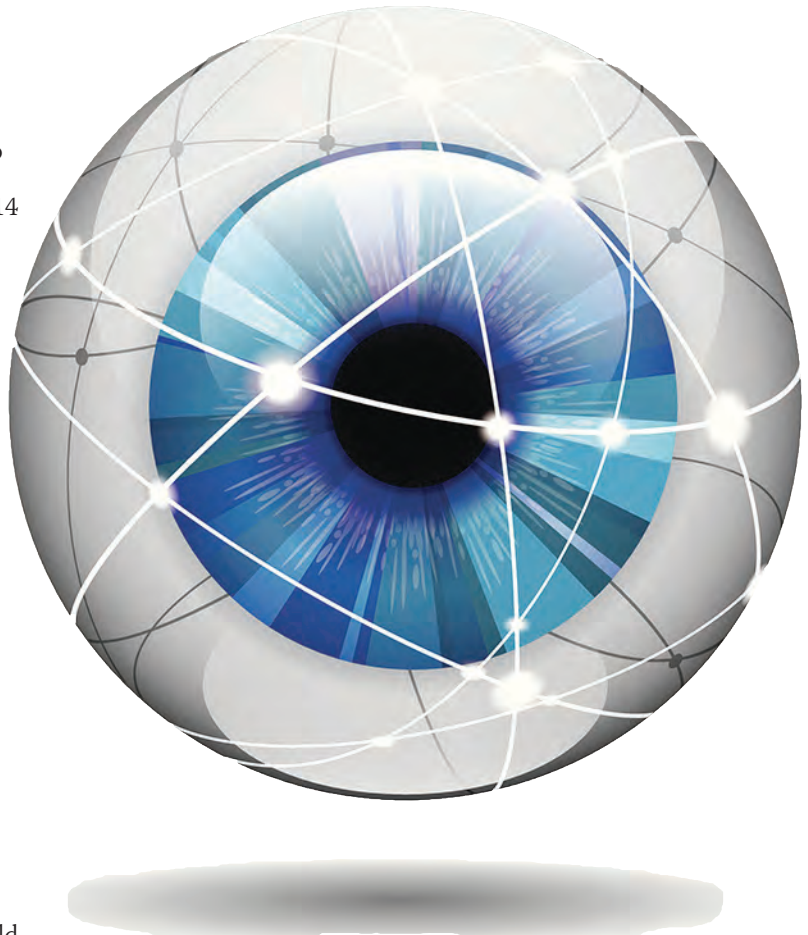
This systems integrator is vying to crack what is arguably Europe's toughest market: Germany. Milan-based Lutech sold

up to private equity firm One Equity Partners (OEP) in July 2017, with general manager Alberto Roseo claiming the move has given Lutech an M&A war chest to go towards expanding into new countries. Given that OEP has offices in Frankfurt, and Lutech already has a number of large customers there, Roseo said Germany is an ideal expansion move for the firm.

But Lutech has recently focused its efforts on acquiring in its home market. The firm snapped up €70m-turnover datacentre player Sinergy last year, deepening its partnership with NetApp and Dell EMC. Most recently, Lutech acquired €20m networking and security managed services provider Nest2 at the beginning of May.

Few Italian-based resellers have managed to set up shop outside of their home country. Lutech's closest competitors in terms of revenue – VAR Group and Maticmind – have not sought to expand into new territories, preferring to concentrate their efforts in their Italian homeland.

In addition, Lutech has vastly outgrown its competition over the last year. The systems integrator grew revenues by a staggering 51 per cent in 2017 to €268m, up from just €83.6m in 2013.







A \$2.2bn (€1.85bn) managed security services powerhouse across the Atlantic, Optiv claims to be 10 times larger than its nearest rivals in North America, and has now set itself the ambition of reaching a similar scale in the UK and Europe over the next two to four years.

Optiv found a new owner in investor KKR in 2016, having previously been backed by Investcorp. The change of ownership forced Optiv to postpone and eventually withdraw from an IPO it filed in November 2016.

Optiv appointed Simon Church – former chief executive of cybersecurity firm Integralis, who departed after the company was rebranded under the NTT Com Security banner in 2015 – as vice president of Europe, to lead an M&A charge across the continent.

In an interview with our sister title *CRN*, Church said he has already opened up talks with several potential acquisition targets following his appointment.

Optiv's entrance into Europe will mean a new competitor for the continent's established MSSP players NTT Security, SecureLink and NCC. Backing from KKR – combined with the American MSSP's sheer scale of 1,800 staff and 7,500 customers – suggests that the firm will not lack the resources or capital to launch a convincing assault in Europe.

In addition, the successes of numerous US-based channel partners of a similar size on this side of the Atlantic such as Insight, CDW and SHI suggests Optiv's European push will prove just as fruitful.



Working with SAP, and only SAP, SOA People is already a 600-employee-strong firm and claims to be among the top five SAP partners in Europe.

One of our business application specialists in this report, SOA People is another ambitious partner that has launched an assault on the German market of late, after bagging a €50m loan that enabled it to acquire local SAP partner Cormeta. Germany is home to some of SAP's most loyal partners such as itelligence and All for One Steeb – both of which turn over several hundred millions of euros every year through the German market. SOA People co-founder Vincent Simioni, however, is confident that his firm will find success in Germany, claiming that large SAP partners such as itelligence have begun to diversify their vendor portfolios away from SAP. As a result, fewer firms are able to offer a SAP-dedicated proposition, he claims.

All for One Steeb, meanwhile, is limited to German-speaking markets, according to Simioni, whereas SOA People offers a pan-European remit.

The goal is to launch revenues from €100m to €250m by 2022, with half of the firm's top-line growth expected to stem from acquisitions. The firm is eager to break into up to three more European countries within the next five years, with the UK, Spain, Italy or Poland named as key targets.



One of France's rising stars in the channel, Umanis was surely one of the country's fastest-growing channel

partners in 2017. For its 2017 financial year, Umanis posted a 157 per cent growth in EBIT year on year to €18.8m. Revenues meanwhile jumped by 25 per cent to €191.1m. Umanis even announced that it would double shareholder dividends off the back of a bumper 2017.

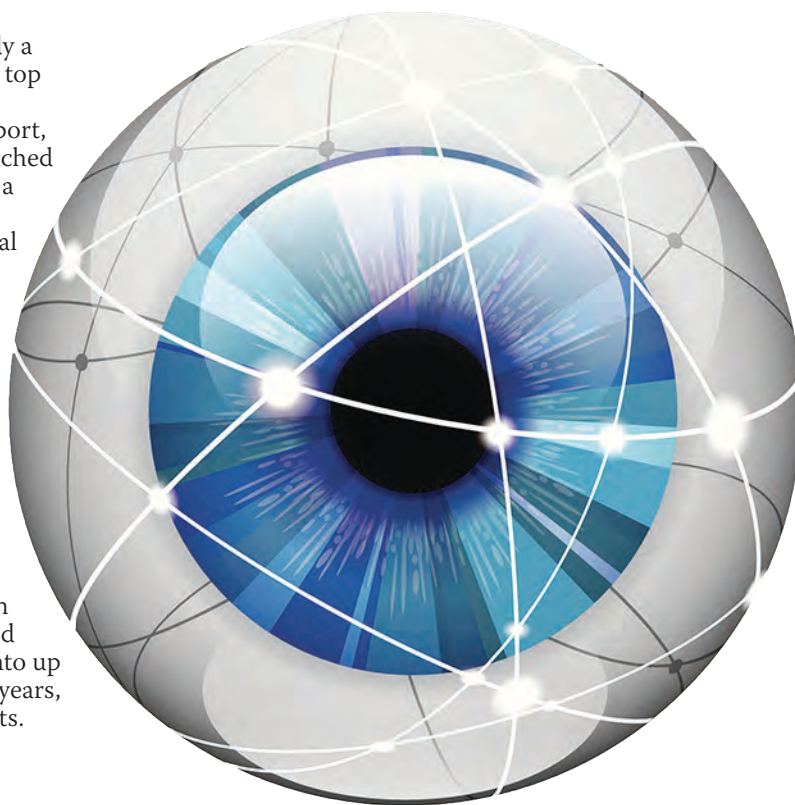
And Umanis has ambitious plans for the next two years, with CEO Laurent Piepszownik telling *Channelnomics Europe* that his company is targeting a top line of €300m by 2019, after which it will look to expand outside France, naming the UK or Germany as likely regions (see more in our Q&A on p24).

The Paris-based firm's identity is founded on an appetite for M&A. Umanis began consolidating the French market in 2013 when it bought €39m-turnover outsourcing firm Helice, more than doubling its headcount to 1,000 staff.

Umanis also bought up 340-employee-strong digital services firm Cella at the end of 2016, and then €7m consultancy house Primlog in July last year. Umanis began 2018 by acquiring €20m-turnover Oracle and Microsoft partner CMS Group.

Piepszownik claims that France is littered with VARs that turn over between €20m and €30m with "limited growth prospects", and are ripe for acquisitions.

Billing itself as a leader in data, business solutions and digital technologies, Piepszownik claims that Umanis goes head to head with global IT services giants Accenture, Capgemini, Atos and Sopra Steria. Although Umanis is making big investments with Google, key vendors include Microsoft, IBM and Oracle.







# Q&A: Laurent Piepszownik

*Chief executive, Umanis*

**Umanis' profits more than doubled last year while revenues reached €191m. How do you explain your lightning growth in 2017, and did it come as a surprise?**

I don't think it is a very big surprise, because it is a continuation of our result from the first half of the year. We operate in a very good market in big data and IoT, and, especially now, we have many projects around GDPR.

Although our growth seems to be good, in our opinion it is not so good because our organic growth was maybe only around four per cent. The most important part of our growth comes from acquisitions, and each acquisition comes with a consequence which is that the entire sales force stop working in the months of integration. The real organic growth we could have would be around eight or 10 per cent if we didn't make acquisitions, which is not our policy because our policy is to reach €300m in turnover by 2019.

**Do you expect sacrificing organic growth in favour of acquisitions to have a negative effect in the long run?**

We manage our business well from our point of view. What is important for us is to make growth and profit. Our operating margin is not too bad, and we think in the future we can improve our margin. The acquisitions will always be the most important part of our growth because in pursuing organic growth – even if we turn back to our 10 per cent organic growth – we will have to wait a long time to reach €1bn, for example.

**You plan to take Umanis to the UK or Germany within the next two to three years. Will you break into these markets organically or through M&A?**

It will be through M&A because organic expansion will take too long. Taking over a small company outside France will also not be useful. If we take over a company that is at €5m turnover, for example, after one year we will have nothing. We consider that when we settle in a foreign country, we will take over a company that has at least €50m in turnover.

We could begin opening subsidiaries in foreign countries in two or three years. Germany and Britain are our targets; it is the same job to open a subsidiary, no matter what country, so it is better to target the big markets.

**You acquired €20m Oracle and Microsoft partner CMS Group earlier this year. How far along the integration process are you? Will you make more acquisitions this year?**

We acquired this company one month ago and it is now considered to be finished. We acquired the company for its consultants, so it is easier to integrate staff, because we don't have to manage the back offices, for example. The back offices remain in CMS; we only acquired the consultants.

The problem now is to find good leads because the pipeline is not so easy, since asking prices have increased and we don't want to pay too much. We currently have two companies in the pipeline which we hope to announce this year.

**Can you say more about the profile of companies you are looking to acquire?**

We are looking for companies that are between €10m and

€50m and the competencies have to be more or less the same. In fact, we don't look for big data companies, we look for competent engineers. What is important is the quality of manpower; it is not the positioning of the company. We are only looking at companies where the engineers are up to date.

**In your annual financial report Umanis flagged hiring engineers as a major challenge for 2018. Is the talent shortage in France really that bad?**

It is important to realise that in this market we have very low staff loyalty. We have to hire a lot of engineers, but the difference at the end of the year between people entering and exiting the company is very low. I think we are going to hire 800 consultants this year, but that does not mean we will have 800 more people at the end of the year, because of the churn.

When we are in competition with big companies it is not a very big problem because they have the same problems we have in terms of salary policy. We have no competition around salary with the big companies such as Accenture or Capgemini. The problem is the small companies that sometimes propose some salaries which are much higher than we can do, but they are short-term contracts.

But for a young engineer, the fact that they can work with us on projects that are interesting, such as big data or GDPR or with Google, that's more attractive for them than another company with less interesting projects.

**How has your vendor portfolio changed over the years? Who do you consider your biggest partners today?**

We have good relationships with Google because we are on Google Cloud, and we have a good relationship with Amazon on its cloud. The relationship is higher with Microsoft than it is with Google or Amazon, but our ambition is to have an equal relationship with all three.

We have a level of relationship with Microsoft where there are only seven companies in the world with our expertise, and we are the only one in France.





# Q&A: Christian Werner

*Chief executive, Logicalis Germany*

## **You announced plans to expand four of your six offices last year and hire 50 more people in Germany. Have these plans come into fruition?**

We moved offices in Stuttgart and Berlin last year, so both are brand new, with nice furniture and both in really cool locations in the middle of the city, pretty close to customers. We have also moved into a new part of the building in our headquarters in Eilenberg and the next one on the radar is Cologne. We are still looking for a good place to move to.

In our recent kick-off we restated my promise to the people in Cologne that once we got the right location we will immediately move into a new and nice office. This will definitely happen in this fiscal year. We have around 300 people, so we made our hiring target. We grew our workforce by something between 15 and 20 per cent.

## **Was hiring 50 extra people in Germany a difficult task?**

In Germany at the moment we have the highest employment rate in 26 years, so it is relatively hard to get good people at a reasonable price. But we can clearly see that our reputation in the market has increased a lot, and we are getting more and more good applications from competitors and from vendors. So in many cases, people are now applying for a role in Logicalis Germany when they might not have done so two or three years earlier.

## **You have set a target to grow revenues from €160m in 2016 to €250m by 2020. Are you still on course to reach that goal?**

What I can say is, we had a fantastic year and we over-performed on all targets we set. The year was much better than planned. We had significant double-digit growth which was higher than the growth of the IT market. If we continue this way, we will hit our €250m target a bit earlier – overall I am pretty optimistic.

## **You made efforts to improve your price-quoting speed last year. Will moving roles to South Africa play a part in this?**

We were able to improve our quoting and we implemented a new version of Salesforce – our CRM tool – in June. I tend to say in most of the cases we are quicker than 24 hours, but when it comes to complicated configuration and big projects where we also need external assistance from vendors, it is maybe a little bit longer. But overall it is much smarter and much lighter than it was 12 months ago.

We have streamlined some internal processes such as credit checks, for example. Do we need to have a manual credit check for every order valued at €3,000, yes or no? I tended to say no, so we have stopped many manual transactions and workloads.

Regarding South Africa, our aim is not the same as our colleagues in the UK; Logicalis UK and Logicalis Germany are different companies and have different histories. What we try to do is, we would like to use operations in South Africa to complement our own offering. We do not want to move workloads and people from Germany to South Africa, but the scope is to clearly enrich our portfolio – for example, Cisco services, 24/7 services and offering Microsoft, in order to add

services to our portfolio that we won't deliver from Germany due to a lack of knowledge or resources. This is what we are discussing at the moment with our internal people and some of our key customers. It could be a good fit.

## **Logicalis Germany finally dropped the old Inforsacom name this year. Why was now the right time to rebrand?**

When the two companies came together roughly three years ago, Inforsacom was a stronger brand in the market than Logicalis was. This has now changed, and all our customers know who they are buying from and with whom they are working.

I wanted to give a sign to all the people at Logicalis Germany that we are one company belonging to a worldwide operating company called Logicalis. We are a 100 per cent subsidiary in Germany and Logicalis, in some other parts of the world, is a very strong brand. If you go to Latin America for example, they are known in the same way as Deloitte and some other very big IT players and, in my view, after three years, this is the next step.


We are working together more and more with our colleagues in other countries. If you do a business trip to Logicalis Spain or Italy, it is just nice to see that it is still the same company.

## **Is there any more work to do in rebranding the company?**

We are completely rebranded already. We still have some minor steps to make regarding the legal and technical rebranding, but this will take place within the next couple of weeks and months. We will be done in June.







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# MEET THE SPECIALISTS: Business applications

## addedo



IBM, SAP and Microsoft make up this software house's vendor stable. Billing itself as an application consultancy, Addedo has two offices in its Swedish homeland – in Malmö and Stockholm – as well as outposts in Switzerland, Germany and Norway. The firm offers software around financial reporting, planning and analysis, and claims to primarily focus on IBM's Cognos offering.



Claiming to have nearly 200 certified consultants across the company, AddPro was founded in 2000 and now offers CRM solutions as well as business intelligence. The firm very recently merged with Swedish IT infrastructure player Svensk IT Funktion. The combined entity will house around 300 staff and reach sales of SEK 900m (€87.21m) for 2018.

## Affecto



This 1,000-employee-strong specialist was very recently acquired by \$10bn IT services giant CGI for €98m. Based in Helsinki, Affecto continues to operate independently under the CGI banner. The firm works with a wide range of software vendors, including Qlik, Microsoft, IBM, SAP and Informatica. Its expertise ranges from big data and analytics to software solutions and managed services.

## all for one STEEB



Claiming to be SAP's number one-ranked partner in the German-speaking mid-market, All for One Steeb's strapline – 'das SAP haus' – leaves little to interpretation. The €300m-turnover firm boasts a team of 1,600 specialists on SAP products, catering for more than 2,000 customers. The firm operates in 13 German cities as well as three locations in Austria, and also has offices in Switzerland, Belgium, Luxembourg and Turkey.

## AUTOCONT



With revenues of around CZK 2.81bn (€110m), this Czech firm admittedly does much more than business applications and management, and also provides IT infrastructure, cloud and outsourcing. Its real strengths, however, lie in its depth of knowledge of Microsoft and IBM software. With 17 Microsoft certifications in total, of which 11 are Gold, Autocont's 750 staff offer ERP and software development solutions.



CIRCON  
www.circon.net



A top Microsoft Dynamics partner, Switzerland-based Circon has 130 staff across the DACH region and the Czech Republic. The outfit has been in business since 1994 and claims to be one of the most internationally awarded Microsoft Gold ERP partners. Circon implements solutions in the retail, wholesale, production and logistics sectors.



This Belgium-based outfit claims it created the largest Microsoft integration and cloud specialist in Europe after it acquired Dutch peer Axon Olympus in October 2016. The firm holds Gold badges with Microsoft in Application Development, Application Integration and Cloud Platform, and works with software ISV Nevatech around application programming interface (API) management. Speaking to *Channelnomics Europe*, CEO Stijn Degrieck said he was strongly against broadening Codit's vendor or technology portfolio claiming that "Codit wants to grow by moving into new countries, not by doing more things." The firm has committed to expanding into two new territories this year. Degrieck is expecting revenues to reach €22m in 2018, 15 per cent higher than last year. Codit has a presence in six countries after opening three new sites in the UK, Switzerland and the Netherlands.



Founded in 1995, this firm claims to cater for more than 1,000 customers globally. A CRM and business intelligence expert, Cohelis offers its own CRM suite made up of analytics, text mining, predictive and social CRM and computer telephony integration.

## digia



This Finnish software and service provider holds six Gold badges with Microsoft – in cloud platform, collaboration and content, digital advertising, enterprise resource planning, application integration and cloud customer relationship management. The firm claims to have more than 100 integration experts, who hold more than 30 certificates in IBM integration tools. In 2017 sales hit €96.2m, while operating profit plummeted from €5.4m to €1.8m during the year. The firm hires around 1,000 staff in eight offices across the Nordics.





Founded almost 20 years ago, Belgian software outfit Easi now has 200 staff across six offices in Belgium, Luxembourg and France. The firm offers software ranging from CRM, financial management and mobile applications to mid-sized organisations. Easi is an IBM Platinum partner and a Microsoft Gold Certified partner.



This Chesterfield-based Microsoft Gold Dynamics 365 partner was acquired by DXC Technology while we were putting together this report. eBECS will be merged with DXC's Eclipse business. The former HPE unit claims the deal will allow it to expand its cloud-first software, services and systems integration business in the financial services, retail, manufacturing and public sector verticals. eBECS' revenues surged by 17 per cent in its financial year ending 31 March 2016 to £31.1m. The firm also has an offshore facility in Jordan, and claims to be Saudi Arabia's biggest Microsoft partner.



Consultancy outfit Edenhouse Solutions bills itself as an "award-winning SAP Gold partner", offering SAP Analytics, SAP S/4HANA, Business ByDesign and Business One. It claims to have delivered more than 800 SAP projects to date through its 200-plus employees. With its head office in Warwickshire, Edenhouse Solutions also has outposts in Manchester and Hampshire. The firm has almost doubled in size over the last two years, as revenues for its year ending March 2017 rocketed by 30 per cent to £39.5m.



With 2,000 staff positioned across 30 offices in Denmark, Norway and Sweden, EG claims to be "by far" Europe's largest Microsoft Dynamics AX partner. The firm turns over around €250m each year and has made at least one acquisition each year since 2012. EG also partners with HP, IBM and Lenovo and caters for around 12,500 customers.



Claiming to be the largest Autodesk Platinum partner in the UK, Excitech provides consultancy, training and support for the construction sector. As well as Autodesk, Excitech works with 21 vendors, including Microsoft, Dell, VMware and Adobe. The London-based firm claims Autodesk's switch from a perpetual to a subscription licensing model had a knock-on effect on its short-term profits, which fell by more than £1m to £2.1m.



**GC SYSTEM**  
Váš partner pro informační technologie



This firm has been operating in the Czech market since 1990, and claims to be one of IBM's most important partners

in the country. GC System is an IBM Gold Business Partner, a Gold Oracle partner, and also works with Microsoft SAP, VMware and Dell EMC.



With offices in the Dutch village of Oud Gastel and Belgian city Antwerp, Informa has built a thriving consultancy around IBM software and services. The firm supports nine IBM product lines: Informix, DB2, infosphere, DataStage, CDC, CDD, Optim, Guardium and Cognos. The firm's services portfolio is built around the vendor's data management and business intelligence.



A Platinum Oracle partner, Gold IBM partner and a Salesforce partner, ITD Solutions has obtained more than 280 certifications and is surely one of Italy's most certified providers of ERP and business applications software. The firm has been in business for 30 years, has five offices across its home country and reached €83m in sales in 2017. ITD also offers big data technology and consulting in data mining and data monetisation.



A member of our Elite, itelligence needs no introduction in SAP's partner circles. The firm holds a total of six global badges with the vendor: in reselling, application management, cloud services, hosting services, SAP HANA and strategic services. The German VAR logged €872m in revenues in 2017, a 12 per cent increase on the previous year. Itelligence has more than 7,000 staff across 18 European countries as well as six countries outside Europe. The firm made its debut in the Nordics this year after snapping up Swedish player EINS Consulting.



A 3,000-employee-strong unit, Keyrus has been in business for 22 years and hit revenues of €257.4m in 2017. The firm holds Gold badges with Microsoft, Oracle, SAP and Hybrid, is an Elite Qlik partner and a Premier IBM partner. Its offering ranges from business intelligence and big data and analytics software to CRM and digital commerce solutions. Keyrus has offices all over the world – in 17 countries including six in Europe: France, the UK, Switzerland, Luxembourg, Spain, and Belgium.



Two of Microsoft Dynamics' largest partners joined forces in October last year, when Germany-based Kumavision acquired 25 per cent of Bolzano-based firm EOS. A specialist in Microsoft Dynamics ERP and CRM software, Kumavision is based in Markdorf and has been in business for more than 20 years. It boasts a workforce of 370 staff across 16 locations in Germany, Austria and Switzerland. Sales in 2016 reached €39.2m, which represents a 12 per cent increase on the previous year.

## MATERNA

Information & Communications



Headquartered in Dortmund, this software house employs 1,700 staff and has 13 locations in Germany as well as a further 12 outside its home market. Partners include IBM, Microsoft, Oracle, ServiceNow and HP. Following a common trend in Europe, Materna acquired a ServiceNow partner last year in the shape of German consultancy ComConsult Kommunikationstechnik, which added a Swiss office near Bern to its already large geographic footprint.



A 180-strong outfit, Navax claims it has implemented more than 750 projects. The firm has seven offices across Vienna, Linz, Salzburg, Graz, Innsbruck, Cologne and Zurich and offers ERP, CRM and business intelligence products from Microsoft Dynamics.



A team of 80 professionals make up this Amsterdam-based applications outfit. Paphos offers implementation services, application management and monitoring with a deep specialism across three vendors: ServiceNow, AppDynamics and Micro Focus.



With sales of €167.7m, this Sage and Microsoft Dynamics partner is one of France's most prominent software outfits in the SMB space. Prodware employs 1,277 staff across its 14 French offices. The firm has, however, been shrinking both in terms of revenues and headcount in recent years. Prodware employee count has fallen by 23 per cent since 2012 and 2017 to 1,277, while revenues fell by five per cent year on year in 2017. The cuts have had a positive effect on Prodware's bottom line as a result, as operating profits grew from under €10m in 2015 to over €15m in 2017.



With Partner of the Year accolades from Infor's SunSystems and SAP's Business One offering, Sapphire Systems provides accounting and business software through its 250 staff across London, Edinburgh and Manchester, as well as international offices in the US, Australia and India. Revenues jumped by 15 per cent to £31.2m for its year ending March 2017, but profits fell by £400,000 to £2.6m.



This SAP specialist is based in the Belgian city of Wavre and has 11 additional offices across France, the Netherlands, Luxembourg and – most recently – Germany. The Platinum SAP partner pushed into its vendor's homeland through acquiring €20m-turnover firm Cormeta. The move has put SOA People into fierce competition with some of SAP's most loyal partners, namely All for One Steeb and itelligence. Co-founder Vincent Simioni told *Channelnomics Europe*

that his firm will not look to expand its vendor stable after moving into the German market. SOA People obtained a €50m loan from Dutch bank ING, which it intends to plough into an aggressive expansion drive to grow revenues to €250m by 2022. The firm claims to be among the top five SAP partners in Europe, with revenues in excess of €100m. SOA People employs 600 staff and claims to serve around 800 customers.



Headquartered in the Croatian capital of Zagreb, Span also has offices across the Czech Republic, the UK, Azerbaijan, the US and Slovenia. The firm boasts an arsenal of 12 Gold certifications with Microsoft, including in applications, cloud, mobility management and collaboration. Span was awarded Microsoft partner of the year for Croatia in 2016 and claims it became the first Microsoft Certified Solution Provider in its home country in 1996. A team of 350 staff, Span has been in business for 25 years and cater for around 200 customers.



Claiming to be Slovenia's largest systems integrator, SRC offers payroll software and CRM solutions. Although the firm also offers datacentre support, its pedigree lies in its deep training in Microsoft, IBM and Oracle certifications.



Microsoft Dynamics, Sage and Qlik make up this Newcastle-upon-Tyne's software offering. Technology Services Group has made a particular push to drive up recurring revenues of late, after it sank to a £1m loss in 2014. Recurring revenues now represent more than 60 per cent of total sales which came in at £34.4m for the year ending 31 March 2016. Sage founder Grahame Wylie expressed his confidence in TSG after pumping £1m into the firm during its year ending 31 March 2016. The software specialist spent more than £500,000 on product development during the year.



This software specialist has offices in Estonia, Norway, Sweden, Switzerland, Latvia, Finland and Denmark. Having been in business since 1992, UpTime claims to tailor-make IT solutions for customers, working with IBM, Oracle and Microsoft.







# MEET THE SPECIALISTS:

## Comms



With revenues of £41m (€46.8m), Dorset-based firm 4Com installs phone systems, broadband and internet, and offers software and applications to its customers. The firm logged a £421,000 operating loss in 2016, after launching an IP phone under the '4Phone' brand, fuelled by a five-year credit facility with HSBC in 2015.



M&A has also been on the agenda of this Tunbridge Wells-based comms VAR. Adept Telecom snapped up four firms during its financial year ending March 2017, and went on to acquire education VAR Atomwide in August last year. Revenues increased by 19 per cent to £34.4m for this LSE-listed firm, as managed services made up 55 per cent of total sales. Adept Telecom works with Microsoft, Fujitsu, EE, Cisco and Avaya and has five offices across the UK.



Having invested heavily in Cisco over recent years, this firm became a Master Cloud Builder with the vendor last year, and operates across enterprise networks, datacentres, collaboration and security and smart solutions. Microsoft and Riverbed make up the tripartite of core vendors for Avodaq. With its headquarters in Hamburg, this 120-employee-strong unit also has offices in Berlin, Stuttgart and Munich, as well as outposts in New York and Singapore after an expansion move in 2006. 2016 revenues reached €33m.



This UCC specialist may have only 170 staff across three offices in Belgium, but it punches above its weight in terms of vendor certifications. BKM works with 20 vendor partners and is a Master partner in Unify's OpenScape Business and Contact Centre offerings and a Platinum partner of UCC vendor Mitel. The firm also holds a Gold Small and Midmarket Cloud Solutions badge with Microsoft, a Gold Enterprise Partner certification with networking giant Huawei, and Platinum status with Netgear. Alongside its UCC pedigree, BKM also offers managed print services and security solutions.



This Cheshire-based firm has made more than 100 acquisitions in its 24-year history, but has been setting its M&A crosshairs on the cybersecurity channel as of late. The

comms VAR snapped up Sophos partner Foursys in April last year to create a new security arm called Chess Cybersecurity. Director Richard Btresh told our sister publication *CRN* that it is targeting another security takeover in the near future. Chess' revenues jumped by a quarter to reach £110.3m for its year ending April 2017, while operating profits grew from £5.6m to £6.5m. Chess has six offices across the UK and employs upwards of 550 staff.



French comms partner CIPE has been in business since 2006. The firm offers networking, videoconferencing, WiFi and cabling installation and services from its Paris location. Cipe is partnered with all the major comms vendors, including Mitel, Unify, Alcatel-Lucent and Cisco. The firm also works with operators including Colt, Orange and Open IP.



This Stuttgart-based firm has four additional offices across Germany, in Leipzig, Berlin, Frankfurt, and Munich. Circular employs around 50 staff and logs sales of around €20m. The firm works with 28 vendors including Avaya, Cisco and Juniper as well as Dell EMC and Microsoft.



This Danish firm is one of the newest companies on this list. Founded just two years ago, ComIzed works with vendors Avaya and Microsoft, and also claims to offer 24/7 support to its customers.



Offering networking, security, communications, server and datacentre solutions, Swedish VAR Cygate could not be called a pure-play comms specialist, but it is still a major partner of UCC and networking vendors Cisco, Mitel and Juniper. Check Point is Cygate's main partner, however, and claims to be the vendor's largest partner in the Nordic region with the pair having worked together since the 1990s. Cygate underwent a change of CEO last year, as Fredrik Sidmar stepped into the hotseat on 1 October 2017, replacing interim CEO Åsa Landén Ericsson. The firm has been a wholly owned subsidiary of NOK 100bn-turnover (€10.5bn) Swedish mobile network operator Telia since 2007, as the company looked to grow its footprint in managed services.



With its headquarters in Dusseldorf, Damovo has been quietly securing top badges with the world's most distinguished UCC vendors over the last year or so. The firm became Mitel's first Platinum Integrator Partner in 2016, and

added a Diamond accreditation with Avaya in 2017, followed by Diamond status with Extreme Networks at the start of the year. The new badges added to existing Gold accreditations with Cisco and Microsoft. Damovo posted €92m in revenues in 2016, spurred on by an acquisition of Luxembourgian player CTTL. The following year, Damovo acquired German Cisco consultancy Netfarmers, before snapping up Swiss Avaya house Vodanet. The UCC specialist is being backed by PE house Oakley Capital, which is aiming to lift its revenues to upwards of €150m through a buy-and-build strategy.



With four offices in the Netherlands, 472 staff, and revenues of €102m, Detron is one of the largest UCC specialists in the Dutch market. Veenendaal-based Detron is a Mitel Platinum partner and has a deep relationship with Cisco and with Microsoft in Skype for Business.



Unified communications is the core offering of this Munich-based channel partner. Founded in 2009, Ethcon works with 19 vendors and became a Cisco Gold partner only this year. The firm also holds badges with Swyx, Avaya, Microsoft and Ascom.



Based in Cambridge, Excell Group works with 19 vendor partners including Avaya, Cisco, Dell, Kaspersky, Microsoft, Mimecast, Polycom and Mitel, among others. The firm offers networking, security, mobility, cloud and voice solutions, and turned over £33m in 2017. Excell Group has 204 staff across its five UK offices.

## GLOBAL ONE



Extreme Networks, Unify, Cisco and Alcatel-Lucent are among the 10 vendors this comms VAR works with. Global One is based in Warsaw, and began life through the merger of two Siemens partners, and today offers a range of UCC products including videoconferencing, contact centre and security, as well as services including technical assistance and consulting services.



Founded in 1999, this French comms VAR has annual revenues of around €11m and employs 70 people across its seven regional agencies. The firm claims to have 2,000 active customers, maintaining around 3,000 sites. Ipneos has 14 partners, including Avaya, Microsoft, VMware, Zyxel, Ascom, Cisco and Ruckus.

Ipneos traded under the name IS Telecom since 1999, but rebranded in 2014 as the firm moved from its Avaya pedigree and into networking and WiFi offerings. The firm entered a transformational merger in August 2017 with €5m turnover peer Infin'IT Group. The merger added 35 people and three locations to Ipneos. The firm then launched a rebrand under the Ipneos name a month later.



Part of the wider Jansson Group, Danish comms player Jansson Kommunikation became a separate subsidiary in 2000, alongside the group's other arms: Jansson El and Jansson Alarm. Its communications arm went on to acquire the communications business from manufacturing giant Siemens in 2002. The deal added 39 employees across two offices in Esbjerg and Odense to the Jansson group. It acquired another Siemens subsidiary in 2003, adding a branch near Copenhagen. Another acquisition brought Jansson's communication arm to a 70-employee-strong unit across Denmark, claiming to cater for upwards of 76,000 active users. The firm holds four Gold-level badges with Microsoft in hosting, mid-market solutions, cloud productivity and communications, but also works with Unify, Cisco and Avaya.



Claiming to be "the leading digitalisation partner in Austria," Kapsch BusinessCom is also a major player across CEE. Its parent group generates €1bn in sales, employs around 7,000 staff and has been in business for over 125 years. Its enterprise business, however, generates revenues of €320m and has 1,200 staff, offering converged infrastructure, unified workplace and connected platforms and applications to its customers. Key vendors include Avaya, Cisco and Microsoft.



This comms VAR has four locations in Spain, across the Basque Country, Madrid, Galicia and Barcelona. The firm provides managed services, maintenance, training and implementation services for customers and works with vendors including HP, Ascom, Polycom, Plantronics, Mitel, Netgear, Microsoft, Cisco and Fortinet.



A family-owned business established more than 60 years ago, Lipinski Telekom has built a successful comms business around Avaya, and achieved Avaya Diamond Enterprise Partner status in 2016. The company now operates from five locations in Germany and has its head office in Berlin.



Founded in 2001, this comms VAR now has offices across Norway, Denmark, Sweden and Finland and hires 270 staff. NetNordic Communications claims to carry more than 250 certifications with around 20 vendors. The firm holds Platinum status with Avaya and Gold with Mitel and Palo Alto Networks and Polycom. It is also an Elite partner with Juniper and an Expert partner of Alcatel-Lucent enterprise. The Oslo-based firm claims to have a client list of 750 large and medium-sized clients, and turned over NOK 1bn (€100m) in 2017. NetNordic Communications offers managed services, consulting services, monitoring and reporting and maintenance services.

The outfit is backed by Norwegian investor Norvestor, the same PE firm that was behind the aggressive buy-and-build



strategy of fellow Norwegian channel partner Crayon before the firm listed on the Oslo Stock Exchange late last year. NetNordic acquired NOK 217m-turnover systems integrator Intelcom in July 2017, a deal which added 70 employees across four Norwegian offices to the firm.



Headquartered in Valencia, this telecoms and UCC partner has offices in 14 further Spanish locations and more than 1,800 customers nationwide. This 320-employee-strong team has certifications with Avaya, Cisco, Microsoft, Polycom and Huawei, offering communications, networking, software and systems management. Founded just a decade ago, the firm made a major expansion move last year through launching a new office in Lima, Peru.

Nunsys embarked on something of an M&A spree last February, snapping up two unnamed Catalan firms, one of which is a Microsoft CRM partner.



Platinum Mitel partner Olive Communications shifted its business from reselling mobile phones to managed comms services in recent years. The move is paying off, according to the firm, as "significant growth" in UCC offset a decline in mobile sales for its year ending 31 January 2017. Operating losses, however, widened to £2.9m for the year. Along with Mitel, Olive Communications also works with Microsoft, Juniper, IBM, Vodafone Apple, Samsung and O2.



A pure-play UCC VAR, Ostertag recently bought the German systems integration business of one of its core vendors, Mitel – a move which CEO Marcus Hänsel told *Channelnomics Europe* would create a €100m revenue comms player and add 11 regional offices to Ostertag. The buyout came after a previous takeover of the telecom activities of IoT specialist euromicron in 2015, and HTC Kommunikationssysteme six months earlier. Ostertag now plans to step back from the M&A game, according to Hänsel, who claims that the firm has now reached critical mass in its home market. Based in the southern German town of Walddorfhäslach, Ostertag works with 18 vendors including Unify, Avaya, Mitel, Microsoft, Ascom, AudioCodes, Plantronics and Sennheiser, and claims to be Mitel's largest partner in Germany and the second largest in Europe.



This comms integrator sold a controlling stake to investment firm Lyceum Capital in 2016, which it claims gave it a £30m war chest to fuel an M&A spree across the UK. Sabio then snapped up SaaS provider Rapport in March last year, followed by pan-European service provider DatapointEurope a few months later. At the beginning of this year Sabio revealed it is set to announce a further two acquisitions to take revenues near £100m and announced its buyout of analytics firm Bright UK just two months later. Sabio hit £43.4m in sales for its 2016 year ending 30 September, but operating profit fell by £1m to £1.6m. The firm's vendors include Avaya, Verint, Nuance and Semifone. Sabio has

offices in six countries: Italy, the Netherlands, France, Spain, Singapore and the UK.



A Gold-certified Cisco and Microsoft partner, Sevenet has been in business since 1997 and now has an offering which boasts everything from contact centre, UCC, networking and datacentre services. The firm works with 14 vendors, and is based in the Polish port city of Gdańsk.



This firm is a fully owned subsidiary of Salzgitter AG, one of Europe's largest steel producers. Telcat works with 26 comms vendors, including Mitel, Ascom, Unify, Polycom and Sennheiser. The firm provides anything from UCC, videoconferencing and telephone systems as well as wireless technology. The firm is headquartered to the north of Germany – in Salzgitter – with offices in 23 further locations throughout the country. It has been in business for more than 30 years.



A wholly owned subsidiary of €1.8bn Belgian mobile operator Proximus, Luxembourgian firm Telindus recently merged with another Proximus subsidiary called Tango to create a new organisation named Proximus Luxembourg. The 500-employee-strong team is a Cisco Gold partner, and also has partnerships with Alcatel-Lucent and Juniper.



This Polish comms VAR offers UCC, videoconferencing, cloud PBX and networking products. With 14 vendor partners including Cisco, Microsoft, Audiocodes, Dell EMC, Cisco and Extreme Networks, Tritech has offices in Katowice and Warsaw. It also offers services including implementation, maintenance and technical consulting and support.



A Cisco Premier partner and a Check Point Gold partner, this Polish service provider offers videoconferencing, wireless solutions, IP telephony and security from eight vendor partners. The company has two offices – one in Warsaw and one in Poznan.



Founded in 1976 in Gouda, Vosko offers managed services around enterprise networking, wireless LAN, security, datacentre and collaboration solutions. Vosko holds a Gold badge with Cisco, and claims to have more than 15 years of experience with the vendor's technology, while also holding top-level badges with Extreme Networks, F5 Networks, Check Point and Flowmon. Two Cisco partners united in June 2017 when the Dutch firm was acquired by Danish IT infrastructure reseller Conscia. Also a Cisco Gold partner, Conscia has kept Vosko's management team intact and has since continued to operate independently.



# MEET THE SPECIALISTS: Cybersecurity



Founded in 2011, although a relatively new firm on the Polish market, Apius has already compiled an offering which comprises services including security monitoring, mobile security, application and data security, and information security management. A team of 34 experts have already won the business of more than 250 customers across 11 countries in the EU and the USA. The firm claims to be the 11th-largest security solutions provider in Poland.



This Swiss firm was founded in Zurich in 1995 and today has 30 staff. The outfit claims to cater for around 200 customers, and logged 2017 sales of CHF 17m (€14m). It works with 18 vendors from FireEye to Check Point and Blue Coat.



Network security VAR Axial Systems enjoyed a 37 per cent boost to its top line for its year ending 31 May 2016, while profits grew from £1.2m to £1.7m. Axial has made a point of expanding its portfolio to include emerging brands such as security container specialist Aqua Security and cloud and data security firm Guardicore. Axial Systems now works with 31 vendors including McAfee, Gigamon, Symantec, Netscout, Juniper Networks and Arista.



Security and networking VAR Brookcourt Solutions has been riding a wave of success of late, as revenues jumped by 33 per cent for its year ending 31 March 2016. Based in Surrey, Brookcourt boasts a large portfolio of around 50 vendor brands, including CrowdStrike, Check Point, F5 Networks, FireEye and Fortinet.



The security arm of £238m-turnover software licencing specialist Bytes achieved £22.2m in sales for its year ending 28 February 2017. Partners include Check Point, Bitdefender, Symantec, FireEye and Forcepoint. Parent company Bytes expanded in the UK last year, opening the doors on its seventh office, and acquired €118m-turnover Microsoft partner Phoenix Software.



With 1,000 employees and 2016 revenues of €129m, Comp SA claims to be one of the largest IT integrators in the Polish market. It has been around for more than 25 years and has four subsidiaries across the country. The company claims to combine its own products with those of hardware and software manufacturers such as Splunk, Forcepoint, Check Point, Palo Alto and F5 Networks. Comp SA has gone through something of a rough patch of late, as 2016 revenues fell by 25 per cent on the previous year.



With a strong focus on the mid-market and large enterprises, Swedish integrator Cygate is surely one of Sweden's most specialised players in the market. The Stockholm-based firm boasts a workforce of 800 staff across 21 Swedish offices, with a strong emphasis on technically certified employees. Its security scope ranges from offering services from its security operations centre, to firewalls, email encryption and GDPR services. The company also offers cloud infrastructure services around Azure as well as networking services. Cygate is owned by Swedish carrier Telia. Revenues reached €270m in its latest financial year.



Working with vendor partners including Symantec, Ivanti, Eset, Veritas and Fujitsu, Damiko offers infrastructure management, network security and data safety to its 80 customers.



This French player provides cybersecurity and compliance services to more than 1,000 customers. Dci turns over more than €50m each year, employing staff across its five locations in Lille, Paris, Lyon, Rennes, Paris and Toulouse. The company acquired fellow French service provider Lhexian to bring its headcount to 165 staff.



This 85-employee-strong operation was acquired by telecoms giant KPN in 2017. Based in Beverwijk and with a security operations centre in The Hague, Dearbytes caters for customers across the healthcare, financial, governmental and industrial sectors.



A Platinum McAfee partner, this Warsaw-based firm also holds badges with CyberArk, Palo Alto Networks, FireEye and Rapid 7. Dim System is making a big push for GDPR



with its primary partner McAfee, especially around data loss prevention and enterprise security management.

## Dubex:



Dubex claims to have the largest security-specialised workforce in Denmark, with 65 consultants across its offices in Copenhagen and Aarhus. In an interview with *Channelnomics Europe*, Dubex CEO Denis Hindsberg said he is gearing the firm up for international expansion through partnering with overseas resellers which lack security expertise in the UK, Norway and Sweden.

The firm endured a few years of falling profits, but returned to growth for its FY2017 when its bottom line came in at DKK 5.9m (€790,000). Revenues for this MSSP hit around €16m annually. Founded in 1997, Dubex works with cybersecurity vendors including Symantec, Check Point, F5, and Trend Micro.

## ezena



This Danish cybersecurity outfit has purposely limited its portfolio to a handful of vendor names, including Symantec and Check Point. The company's service offering, Secure Service, is billed through a monthly subscription, and includes audits, advice and managed services.

## H-SQUARE



This Prague-based cybersecurity provider claims to be the most qualified Palo Alto Networks partner in the Czech Republic, since it attained Platinum partner status in October last year. Other partners include Paessler and Rapid7.

## InfoGuard

SWISS CYBER SECURITY



Claiming to be a team of 100 security specialists, Swiss MSSP InfoGuard has two offices – in Bern and Baar – and claims to serve around 300 customers. Founded in 1988, InfoGuard works with around 30 vendors, and also runs its own datacentre and cyberdefence centre.

## KUDELSKI SECURITY



Swiss MSSP Kudelski Security expanded into the US with an office in Phoenix, Arizona and later acquired two US-based cybersecurity companies: Milestone Systems and M&S Technologies. Claiming to hire around 300 staff across the US and its Swiss locations in Lausanne and Zurich, Kudelski works with 28 vendors including Fortinet, FireEye, CrowdStrike, Blue Coat and F5 Networks. Services range from managed security to technology consulting and cyber staffing.



A top Benelux partner of Check Point and Forcepoint, Dutch UCC firm Motiv has been in business since 1998 and offers networking, application and data security as well as monitoring from its security operations centre. With its

headquarters in Nieuwegein, near Utrecht, Motiv also works with Juniper Networks and F5 Networks.

## nccgroup



Manchester-based NCC Group has endured a difficult year. The firm posted an operating loss for its 2017 and CEO Rob Cotton left the company with immediate effect in March. The FTSE 250 firm posted an operating loss of £53.4m for its financial year ending in May, while revenues came to £244.5m. The group is currently looking for a buyer of its web performance and software testing business. NCC has 11 offices across the UK and 35 offices globally. The firm employs upwards of 2,000 staff and caters for 15,000 clients.



Founded in 2009, Netsecurity operates through its five offices across Norway, in Kristiansand, Grimstad, Stavanger, Oslo and Bergen. Services on offer include firewall auditing, incident response, penetration testing, consulting and end-point security.



This French cybersecurity specialist was acquired by Dutch networking and security player Infradata in 2016. With around 70 staff across five locations in Rhône-Alpes, Lille, Boulogne, Lyon and Toulouse, Nomios works with 22 cybersecurity vendors, chiefly F5 Networks, Fortinet, Symantec, Forcepoint and McAfee. The company has kept its branding since the acquisition.

## NTT Security



Its headquarters may be in Bavaria, but this MSSP titan has more than 1,500 staff across 20 offices in Europe, Asia, the US and Australia. German revenues hit €75.8m for its last financial year.

Part of the Japanese telco giant NTT, NTT Security underwent a company-wide restructure in 2016 which saw its sales staff transferred to its parent group's other operating entities Dimension Data, NTT Data and NTT Communications. Former central European boss Kai Grunwitz took on a new role as EMEA VP last year, and told *Channelnomics Europe* that NTT Security has stepped away from reselling vendor products in favour of fuelling its services growth. With 1,500 staff globally, Grunwitz said that 70 per cent of NTT Security's services business is now going through NTT's operating companies.

## PINEWOOD

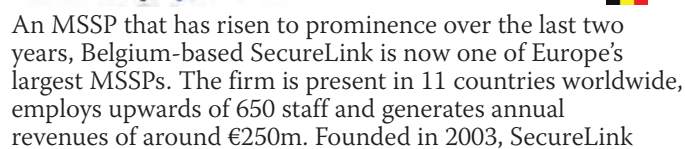
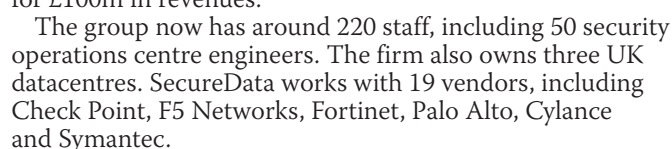


Founded in Delft in 1994, Dutch MSSP Pinewood boasts its own security operations centre which offers 24/7 security monitoring for its customers. Other services include data-protect impact assessments, training, service desk support and managed services. Among its top vendors are F5, Fortinet, Check Point and McAfee.

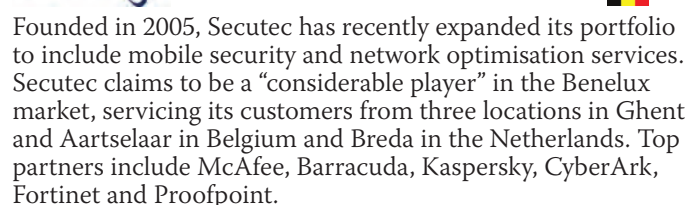
## QSight IT



**SECURE DATA**  
TRUSTED CYBERSECURITY EXPERTS



Marco Barkmeijer, the chief executive who led SecureLink's global expansion, stepped down this year to be replaced by Thomas Fetten. Fetten boasts a CV which includes more than 11 years at IBM and five years as COO at one of our Elite players – Getronics. The firm works with around 50 vendors including FireEye, Check Point, Fortinet, Cylance and Symantec, Splunk and Palo Alto.







# MEET THE SPECIALISTS:

## Print



A top HP partner in Spain, AGR Sistemas holds Gold badges in imaging and printing, supplies, managed print and managed services. It also works with Konica Minolta and claims to have more than 25 years of experience in the industry.



**altodigital**  
your office technology partner



With revenues of £61.8m (€70.6m), Altodigital used 2016 to set up new offices in the UK and make two small acquisitions. The Leighton-Buzzard-based firm's CEO was forced to stamp out rumours that Altodigital was up for sale in September. The firm has been in business for 35 years and employs more than 500 staff. Its main partners are Ricoh, HP, Kyocera, Sharp and Canon, but it works with 25 vendors in total.



This print specialist sold up to one of its own vendors – Kyocera – in December 2016. At the time, Kyocera told our sister publication *CRN* that Annodata will be free to operate independently after the deal and work with other vendors. Annodata also offers UCC, cloud services and IT infrastructure services alongside its managed print pedigree. It works with 12 vendors including Kyocera, Ricoh, Datto and HPE. Revenues for its fiscal year ending 30 June shrank by eight per cent to £60.1m, while operating profits grew by £400,000 to £6.4m.



**APOGEE**



The UK's largest print specialist, Apogee hit a revenue run rate of £250m after it acquired troubled competitor Danwood at the start of last year. The blockbuster buyout was the largest in a string of four acquisitions after it received backing from Equistone Partners Europe in September 2016. Apogee counts Canon, Xerox, Ricoh, HP, Kyocera and Konica Minolta as its main vendor partners. The firm has offices in Germany – in Hannover and Oberhausen – through acquisitions made in 2016 and 2017 and also has an outpost in Paris.



Claiming to be able to “do everything in the field of printing”, BlueBrain may have only been in business since 2012, but has already built a portfolio around print offerings from Epson, HP and Brother. BlueBrain also offers managed print services, consulting and auditing.



A Platinum HP partner, Burokopy claims to be a printing-as-a-service specialist. Burokopy also works with Kyocera

and has offices in Madrid and Barcelona. With nearly 1,000 customers, Burokopy factors in maintenance, parts and consumables as part of the package in an as-a-service customer model.



**DOCUMENT  
STORE**



Claiming to be Xerox's number one partner in France, Document Store turned over €57m in 2016 and caters for 4,500 customers across banking, insurance, legal, publishing and advertising. With a 60-employee-strong team based in Paris, Document Store works with six IT vendors: Xerox, HPE, Dell, Apple and Microsoft offering products including printers, office supplies, IT infrastructure and 3D printers.



Druckerfachmann was founded in 1998, has almost 100 staff and turned over €26.28m in 2016. This print specialist became a subsidiary of central European distributor ALSO in 2011, but has been operating as an independent company since. A Platinum HP partner, Drucker Fachmann offers managed print, document management and consulting services.



Founded in 1988, this print specialist is based in Warsaw and offers services around managed print and software-as-a-service. Key vendor partners include HP, Ricoh and Lexmark.



Starting life from a 10 square-metre office in Guggenberg, this Austrian specialist now claims to be a services-led organisation offering managed print services, document management, consumption cost optimisation and equipment fleet optimisation.



Manchester-based M2Digital has been a wholly owned subsidiary of European reseller SCC since 2014. It claims to be “the leading independent managed print services provider in western Europe”, logging revenues of £46.5m in its financial year ending 31 March 2017. Working with the main print vendors Ricoh, HP, Canon and Xerox, M2Digital also counts PaperCut, Docuware, Nuance and Efi in its partner line-up.



This Belgian print specialist came into being through the merger of two Benelux players AB Supplies and Systemat-owned Allo Supplies, and now claims to be number one in the market for IT consumables, as well as a specialist in

equipment and printing solutions. Consisting of a team of 40 staff, Mimeos says it caters for 10,000 customers, offering services around mobile and cloud printing, secure print management, fleet management and document management.



With six locations across Switzerland, NRS Printing Solutions offers its managed print services to resellers nationwide. It works with HP, Lexmark, Konica Minolta, Kyocera and Canon as its key vendors. Founded in 1990, it has been part of the Schweiz AG distribution group since 2012.



German printing VAR Office Products operates from two locations, in Dresden and Kirchheim unter Teck. The firm is an HP Partner First Gold partner, a Canon Premier Partner, and a DocuWare Gold Partner and offers fleet management, document services and pre and post-sales support.



Claiming to have “a passion for print”, OSN Nederland is based in Houten, and serves around 500 customers. The firm has been in partnership with Dutch reseller Scholten Awater, now part of Infotheek, since 2011. OSN Nederland went through something of a refresh in late 2016 – revamping its logo and website and moving into a larger office. Now the firm works with 12 print vendors, including big names such as Canon, HP, Lexmark and Xerox.



Although this IT provider does much more than printing and related services, it is still a major print specialist in France, holding top-tier status with HP and Brother. Quadria has a workforce of more than 250 staff in 16 sites across France and offers print management as well as support and maintenance to around 5,000 customers.



With a workforce of 30 employees, Scriptor offers print-as-a-service, print management, installation services and support to its customers in Denmark, working with vendors including HP, Lexmark and Ricoh. This firm also sells second-hand printers, which are included in its managed services offering.



With a workforce of 275 staff across seven offices in Spain and Andorra, this Madrid-based firm turned over €52.3m in 2017. Semic's JustPrint offering is a core part of its business, and includes managing devices, billing, support and security. Semic is an HP Managed Print Specialist and Platinum partner and a Lexmark Expert partner.



Belgian player Smartify works with six vendors: HP, Xerox, Kyocera, Konica Minolta, Zebra and Nuance and claims to be

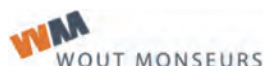
a leader in printing-as-a-service and managed print services.



This 25-employee outfit has been in business since 1994, and turns over around SEK 100m (€9.6m) each year. The specialist acquired the Karlstad subsidiary of Japanese vendor Sharp in 2015, doubling its headcount. Utec described the deal as “the biggest thing that’s happened in Utec’s 21-year history”. The firm offers printers from HP, Sharp, Brother and OKI.



Having been in business for almost 100 years, Veenman started life selling typewriters and is now an independent subsidiary of printing vendor Xerox. Based in Rotterdam, this firm works with six other vendors: Y-Soft, Q Conferencing, Holland Computers, Filelinx and Quadira. Veenman also offers services such as print management, document management and invoice processing.



Although this firm also sells office furniture and supplies, it holds a Gold Specialist badge in printing with HP and also works with Canon, offering a host of managed print services. Wout Monseurs' portfolio includes faxers, printers, scanners and even 3D printers. Based in the south of the Netherlands in Breda, this firm claims to offer a range of 20,000 products and promises a delivery time of less than 24 hours.



Xerox partner Xerotec claims it created “a new managed print powerhouse” when it acquired HP Platinum partner Landscape Group last year. The firm claims that more than 65 per cent of its staff are in services-related roles, and the firm has recently tapped into HP's device-as-a-service offering off the back of its Landscape acquisition.



This Danish managed print specialist claims its customers are cutting printing costs by up to 30 per cent by outsourcing their IT to XP Digital. Based near Copenhagen, XP Digital has been in business since 2002 and now boasts a GDPR print solution through a partnership with PaperCut.



Founded in 1999, Xsystem works with a raft of print vendors including Xerox, Lexmark, OKI, HP and Y-Soft. The firm endured a tough 2016, as operating profits fell to a net loss of PLN 364,000 (€84,650), while revenues shrank to PLN 8.16m. Xsystem has created its own document management product called ACCELO, which it hopes will bring it out of the red.



This specialist boasts a workforce of 140 staff. Xtandit holds Partner First Gold status with HP and claims to be the only reseller in the Netherlands to be awarded Platinum status with Xerox.





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# THE BEST OF THE REST

## BENELUX

**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

**Acumen** A small Belgian VAR specialising in business intelligence and performance management tools working with Microsoft and IBM

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

**AEIS** With headquarters near Brussels, AEIS also has sales locations in France and the Netherlands as well as product development centres in Sri Lanka and Slovakia. It employs around 200 staff and works with software vendors Infor, IBM, Informatica and Blackline

**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

**AXI** Operating across Belgium and the Netherlands, this firm employs around 230 staff and provides hardware, software and services from vendors including IBM, Microsoft, HP, HPE Dell EMC and VMware

**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

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

**Bossers & Cnossen** VAR based in Groningen

**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

**Dochbyte** 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

**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

**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

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

**Inergy Analytical Solutions** BI and big data firm from Woerden, the Netherlands

**Intragen** Utrecht-based Intragen develops and deploys identity and access management products, but also works with Dell

**IRIS** Publicly listed on the Euronext exchange, IRIS turns over around €110m, and counts IBM and VMware as its chief partners alongside Cisco, Lenovo and Pure Storage

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

**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

**Jibes** Acquired by Dutch investor Waterland Private equity, this data expert has drawn up plans to expand across Europe

**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 for clients 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

**Openline** Hybrid cloud specialist Openline operates across the Netherlands and has made a big push in helping customers prepare for GDPR

**Pixielixir** 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

**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

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

**Simac** Having been in business for 47 years, Simac trades across the Benelux and central Europe and employs around 1,250 staff

**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

**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

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

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

**DC Logic** Russian integrator

**Delta Group** Big VAR player in Hungary

**Diatom** Latvian software development house

**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

**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

**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

**In Line Technologies** Russian channel player

**Innoware** Ukrainian ERP specialist

**ITCE** Bulgarian Microsoft house

**K2 Atmitec** Czech software firm

**Kodeks** Croatian Cisco partner

**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

**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

**Paraflow** Bulgarian company with many vendor certifications

**Prime Solutions** Poznan-based IT house

## CEE

**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 addresses the financial services sector

**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

**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

**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

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

**Senior Software** Romanian Microsoft partner

**Simac** Croatian IT house

**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

**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

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

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

**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

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

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

**ACP** Specialises in hybrid IT

**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

**Adesso** With 15 locations across Germany as well as outposts in Switzerland, Austria, the UK, Turkey and the US, Adesso has around 2,100 staff and has revenues of around €260m

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

**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

**Artaker Computersysteme** Employs 40 specialised consultants

**Ategra** Swiss software specialist

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

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

**Bat Groupware** Viennese ISV

**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

**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

**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

**Ceruno** Managed services and IoT player

**Cisel** Specialist circuit board manufacturer

**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

**Clue** Swiss security services operator

**Comline** Having expanded beyond its reseller routes in recent years, Comline now has a growing consultancy and services business and recently opened datacentre facilities in Berlin and Frankfurt

**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

**Controlware** Networking, security and comms are the key specialisms of this VAR. Controlware runs 11 locations in Germany along with outposts in neighbouring Austria and Switzerland

**Dabero** Data and analytics are this firm's main areas of interest. Dabero works with IBM and SAP and operates from 14 locations across 12 German cities, and also has a presence in Switzerland, Austria, the UK and the US

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

**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

**Datagroup** This firm completed what it described as a 'milestone' acquisition last year when it acquired hosting and cloud services firm ikb Data. The deal added 73 staff and €27m in sales to Datagroup. The firm has acquired a total of 20 firms since its IPO in 2006

**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

**DCCS** Digitalisation firm with 150 employees

**Dyna BCS** Offers managed services and backup



**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

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

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

**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

**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

**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

**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

**Itris** One of Switzerland's largest home-grown VARs, Itris employs around 450 staff and offers IT infrastructure, managed and cloud services and maintenance and support

**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

**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

**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

**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

**Morgenstern** Printing and services VAR

**MP2 IT Solutions** Three offices across Austria

**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

**MR Datentechnik** 380 staff make up this German VAR, which generated sales of €136m in 2016. The firm offers security, storage, client, print management and mobility services

**NetCloud** Employing 140 people across Bern, Basel and

Winterthur, NetCloud holds top-level partnership with Cisco and NetApp

**NetUSE** Top-level Check Point partner

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

**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

**Pitagora** VMware partner with two Austrian locations

**PM Factory** Personnel and outsourcing specialist

**PrimeForce Consulting** Enterprise content management consultancy

**Profi** This firm consists of 380 staff across 15 German offices, with revenues hitting around €150m in 2016. Key vendors include Dell EMC, Nutanix, IBM and Lenovo

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

**Quality Now** Swiss HPE-focused integrator

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

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

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

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

**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

**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

**SVA** An ambitious German integrator, SVA grew revenues by 34 per cent in 2016 to €400m. The firm has around 650 people across 15 locations. Top vendors include IBM, NetApp, Cisco and Microsoft

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

**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

**Trivadis** Emerging tech such as big data, IoT and digital transformation are the three pillars of this Swiss firm

**T-Systems** An IT services giant in its own right, T-Systems posted a 20 per cent drop in EBITDA in its first nine months of 2017, which prompted a change of CEO last September

**UMB** UMB is one of the Swiss market's most established

VARs as it celebrated its 40th anniversary this year. The firm employs 240 staff

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

**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

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

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

**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

**Xtention** An outfit of 220 staff, this firm has been in business for 17 years and works with Cisco, Citrix, HP, Oracle, Microsoft and Symantec

**Zühlke** Swiss-based integrator Zühlke has been following global ambitions of late, setting up shop in Singapore with the US named as a longer-term goal

## FRANCE AND SOUTHERN EUROPE

**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

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

**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

**ACS** Four offices make up this 30-year-old Italian VAR. The firm holds Platinum status with HP and HPE, has 220 staff and serves around 2,200 customers

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

**Aaxis** 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

**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

**ArcITek** Parisian IT provider

**Aroundor** Services house based in Orléans

**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

**Atos** An established global name, Atos claims to be Europe's leader in big data, cybersecurity, high-performance computing and digital workplace. With a colossal 100,00 staff and revenues of €12bn, the firm has locations in 70 countries

**ATSistemas** With 1,000 staff, ATSistemas has six locations across Spain and offers IT infrastructure services, systems integration and cloud

**Axians** The French IT business of energy and construction giant Vinci, Axians now has €1.7bn in revenues and 8,000 staff thanks to a spate of acquisitions over the last five years

**Axiant** 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

**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

**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

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

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

**BSD** Collaboration and comms specialist

**Byte** Greek VAR Byte may only have revenues of around €25m, but it is a major partner of Cisco, HP, HPE and Dell EMC in southern Europe

**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

**Cheops Technology** This VAR has around €100m in revenues and considers HP, Symantec, Dell EMC and Oracle as its key partners. With 14 offices worldwide, CEO Nicolas Leroy-Fleuriot told us he planned to set up shop in the US market around private cloud services

**Cleis Tech** System integrator from Milan

**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 standalone Cypriot business. Providing a range of IT and telecoms offerings, the firm has well over 100 staff and turnover of more than €20m



**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

**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

**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

**Devoteam** With sales of €555m, this cloud specialist works with Google, Microsoft, ServiceNow and Red Hat

**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

**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

**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

**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

**Filippetti** One of Italy's leading systems integrators, Filippetti works across IT infrastructure, cloud and application development

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

**General Computer Italia** Maintenance and support provider

**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

**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

**Hardis Group** The CEO of this firm has told us he's keen to double its Salesforce business after sales hit €100m in 2017. It acquired two Salesforce partners in 2017, which helped Hardis move into the top 10 providers in France, with a 50-strong team of dedicated specialists

**Henix** IT and consulting firm from Paris

**Hitech Pros** French ITSM outfit

**IAN srl** Milanese server and storage VAR

**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

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

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

**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

**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

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

**Interdata** French network integration specialist

**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

**Irene** Specialises in industrial applications

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

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

**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

**ITS Group** Based in Paris, this MSP has 10 offices across France, Belgium and Switzerland and hit revenues of €188.8m in 2017

**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

**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

**Maticmind** Formerly part of the Swiss group Ascom, Maticmind is a top integrator in the Italian market, hiring 560 staff across eight Italian cities

**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

**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

**New Cytech** A Cypriot firm working with more than 20 major vendors and 1,000 customers

**NovaBase** One of Portugal's top three IT services firms, Novabase has revenues of around €136m and international locations in Spain, Mozambique, Angola, Turkey and the UAE

**Novatim** Provides IT and telecoms to enterprise customers NSIT Systems Parisian consultancy

**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

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

**Oceane Consulting** French firm that hit €25m sales in 2016

**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

**Partenor Group** For the first 22 years of its life 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

**Philog** Focused on IP communications

**PMC** Italian systems and storage integrator

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

**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

**Satec** This Spanish firm employs 1,000 staff and holds Gold status with Cisco and Oracle

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

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

**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

**Setra Conseil** Specialises in database technology

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

**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

**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

**SoftCompany** In 2016, 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

**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 Información** Spanish firm offering solutions from SAP and other vendors

**Space** Networking, comms, security and telecoms services cover the offering of this Greek VAR headquartered in Athens. The firm generated €50m in revenues in 2016

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

**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

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

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

**TCSI Digiberia Tecnologias** 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

**Zucchetti Informatica** An Italian IT house with 10 offices and 2,700 staff across its home country

## NORDICS

**123 Data** Oslo-based IT store

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

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

**Addpro** Swedish application and cloud integrator Addpro provides CRM and business intelligence products

**Advania** Founded almost 80 years ago in Reykjavik, this firm claims to be a “one-stop shop for everything IT related”. Advania comprises 1,000 staff across its home country, Sweden, Norway and Denmark

**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

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

**Appendo** IBM-focused content management specialist

**Areto Solutions** Trondheim-based digitalisation specialist

**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

**B2B Solutions** Offers IT and communications solutions

**B4 Restore** An IBM Platinum partner from Denmark, B4 Restore provides storage and backup-as-a-service

**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

**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

**Datacon** This Danish €40m-turnover Microsoft, HP and

HPE partner has two offices in Aarhus and one just north of Copenhagen

**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

**EdgeMo** Despite being in business for less than six years, this firm prides itself on the range of high-end badges that 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

**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

**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

**Inopi** Danish digital business specialist

**IntraVision** Microsoft and IBM house from Copenhagen

**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

**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** Systems, hardware, and consulting firm from Denmark

**JDM** Microsoft-focused cloud player

**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

**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

**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

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

**Konehuone** IT provider from Espoo

**Koneo** This 400-employee-strong Swedish firm provides anything from PCs to high-end computing and also sells products online

**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

**Middlecon** "Big data without angst" is this this Stockholm-based firm's mission statement. It has also branched out into a number of emerging-technology areas, including big data and blockchain

**Molgaard Data** Offers IBM Power Systems

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

**MOTUS** Specialises in lifting and handling systems

**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

**Netverkspartner AS** Norwegian VAR founded in 2001

**Netwell** Finnish social business specialist

**Nýherji** Logging €130m in revenues in 2016, this Icelandic VAR employs 500 staff and has been in business for more than 25 years

**Office Center** Provides Apple and Microsoft technologies

**OlapCon** IBM Premier business partner from Finland

**Opin Kerfi** Another Icelandic VAR, Opin Kerfi has been in business since 1985 and offers infrastructure from HPE, Cisco, Microsoft and VMware

**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 services

**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

**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

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

**Sigma** Made up of six business groups, this firm has 3,000 staff across the world, offering product supply, connectivity and consulting

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

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

**Soleno** IBM-specialised consultancy

**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

**Solita** Finnish digital services company

**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

**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

**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

**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

## UK AND IRELAND

**1E** Software life cycle automation specialist

**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

**ANS** Mancunian networking and cloud provider

**Arkphire** This Dublin-based MSP recently partnered with ServiceNow, adding to its current vendor stable which includes Dell EMC, Cisco and VMware

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

**Auxilion** Cloud and support provider

**AVMI** Audiovisual integrator

**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

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

**Blue Chip** Independent IBM support provider

**BT Business Direct** Computing, networking and ICT arm of telco giant

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

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

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

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

**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

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

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

**Claranet** Acquisitive MSP Claranet made the UK its latest M&A target when it snapped up a data storage reseller – its second deal of the year. The firm is expecting to hit £310m this year based on acquisitions throughout 2017

**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

**CSI** Acquisitive VAR and MSP

**DataDirect** Self-styled "IT concierge"

**Datapac** Irish reseller Datapac claims to be the country's leading IT solutions provider. It has been around for more than 35 years and works with most major vendors

**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

**DNM** Claiming to have more than 150 customers across Europe, North America and Asia, this Irish firm claims to be a truly international company. It 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

**eBuyer** Big e-tailer of IT products

**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

**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

**Evros** Another Irish reseller, this 250-employee-strong outfit claims to support more than 100,000 devices across its home country

**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

**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

**IT Lab** MSP with offices in London and Manchester

**IT Quotes** Uses an innovative online quoting tool

**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

**K3** Publicly quoted retail software specialist

**KCOM** Telecoms firm with extensive VAR operations

**LAN Consultants** Irish networking specialist founded 20 years ago

**Managed 24/7** In 2016 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

**Maintel** This comms player recently doubled in size after acquiring UK peer Azzurri Communications. CEO Eddie Buxton claims more M&A is likely, particularly around managed and hosted services

**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

**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

**Phoenix Software** This software reseller was acquired by fellow Microsoft partner Bytes last year, but is still trading under its own brand

**Planet 21 Communications** Polycom, VMware, NetApp and Cisco make up this Dublin-headquartered firm's vendor stable. With three offices in Ireland, it also has locations in Belfast and the US

**Printerland** Print reseller that works with all the major vendors

**ProAV** Focuses on audiovisual solutions

**Probrand** Has begun to develop its own IP

**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

**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** £108m-turnover MSP from Harrogate

**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

**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

**Sord Data Systems** HP Platinum partner that sells online and works with the public sector

**Stone** One of the biggest PC manufacturers working in the UK channel, Stone also works with Apple, Acer and Lenovo

**Storm Technologies** Fast-growing HP, Microsoft, and VMware partner

**Stormfront** UK Apple Premium Reseller

**Strencom** Offers managed connectivity and cloud

**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

**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

**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

**Trams** Apple VAR that has branched out in recent years

**Triangle Computer Services** Works with IBM, VMware, and Cisco

**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

**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

**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

**XMA** Based in Nottingham, this reseller trades mainly in the education and wider public sector market

**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

## CHANNELNOMICS

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