



AGILITAS



EVOLVE
THE CHANGING CHANNEL

TECHNOLOGY CHANNEL CONFIDENCE INDEX 2022

THE JOURNEY TO A SUSTAINABLE FUTURE

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INTRODUCTION

Welcome to the third annual Technology Channel Confidence Index 'Barometer for Change' by Agilitas. Here, we explore the continuous evolution of the Technology Channel, by measuring the decision-maker attitudes and curating trends, predictions, forecasts and commentary about the current state of the Technology Channel and the outlook for the year ahead.

By reflecting on the years since the launch of the inaugural Channel Confidence Index in 2019 - and the transformative change that has taken place - we provide a window into the shifting priorities and challenges faced across the Technology Channel today, and highlight the actions businesses are taking to build a healthier, more resilient and sustainable future for the technology industry as a whole.

For the last two years, our research-led CONNECT campaign has given a voice to the Technology Channel, providing a hub where free-to-view intelligence, insight and advice combine to help leaders make actionable change. In order to benchmark the pace of this change, we have continued our focus on fundamental areas of focus, such as External Influences, Recruitment, Resilience, Globalisation, Sustainability, Customer Experience and Productivity.

These themes remain an integral part of this year's report, providing powerful insight into the continuous progression of the Technology Channel. However, those familiar with the Channel Confidence Index may notice that this year's report looks a little different. The world is at a crucial inflexion point and requires drastic change in order to improve environmental, social and governance (ESG) practices and ensure we have a place to flourish and grow sustainably for years to come.

Here at Agilitas, we are committed to moving the needle for change through our own sustainability pledge to achieve a climate positive workforce by 2030. The newly named Technology Channel Confidence Index acts as an outward extension of our values, designed to help channel businesses to understand the current state of play, navigate this transformational journey and meet carbon reduction targets, together. And so, the CONNECT campaign has taken on a new name, 'EVOLVE'.

There is no Planet B. Businesses - in the Technology Channel and beyond - must be intrinsically committed to act with impact and make sustainability their priority, if we are to ensure a brighter future for the Planet, People and Partners. For many, this means evolving current practices and adopting new initiatives in these three core areas, the outcomes of which are explored in the pages to follow.

The findings explored in this report were gathered in early 2022 in partnership with respected research firm Opinion Matters. To align with previous years, we surveyed 250 respondents working in UK-headquartered businesses with an annual turnover of over £5million.

2020



2021



2022



As a leader in the UK & Global Technology Channel, Agilitas understand the difference that reputable and respected knowledge can make in helping channel leaders place themselves at the curve of change and help to build strategies that future-proof their business - and the world as we know it. However, we also know we can't do it alone. For the first time, we have also invited a number of respected channel leaders to share their own reactions to the findings and offer first hand insight into how their own businesses are supporting the future of our industry and the planet.

With that, it is our pleasure to bring you the Agilitas Technology Channel Confidence Index 2022 - The Journey to a Sustainable Future.

Shaun Lynn
CEO, Agilitas



FOCUS AREAS



DEFINING SUSTAINABILITY

Before we dive deep into the findings of the 2022 Technology Channel Confidence Index, the first report in the EVOLVE era, we begin by defining what exactly is meant by a 'sustainable future'.

When thinking about sustainability, companies can be forgiven for defaulting their thinking towards environmental issues. Of course, the long-term welfare of the planet must be a top priority and every business should be committed to playing its part in contributing to a healthier future for the Earth.

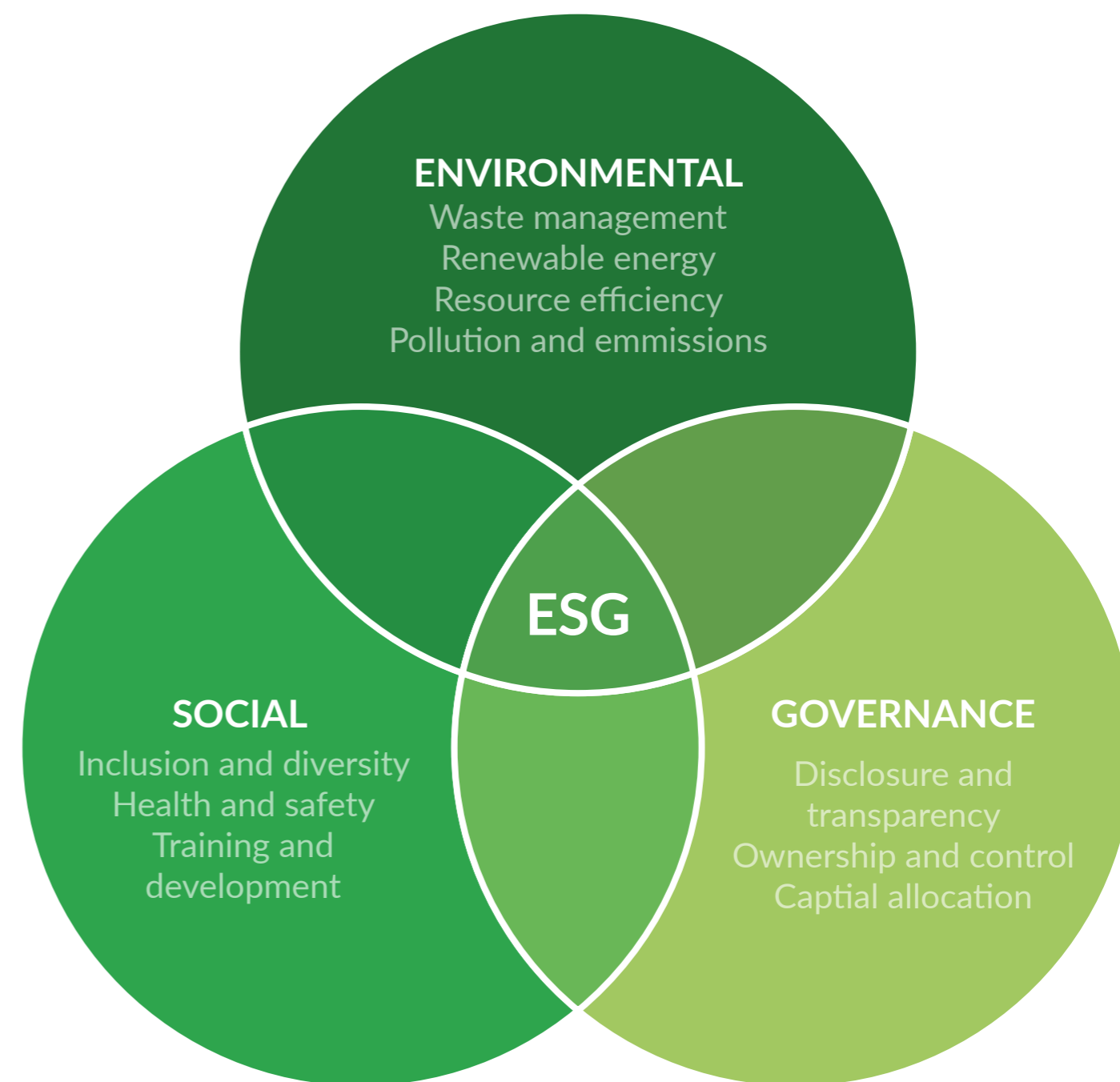
Yet, when we talk about a sustainable approach to business, there is much more to consider than environmental responsibility alone. In fact, Environmental, Social and Corporate Governance (ESG) are the three crucial pillars that work together to deliver full social consciousness and ultimately, better business.

ESG requires a holistic approach whereby businesses look beyond short-term profit and financial gain to prioritise social goals that not only concern their economic viability. As the UK Government increasingly imposes objectives for businesses in these areas, companies are being benchmarked on their ESG credentials more than ever before. Without a well-rounded strategy in place, many Technology Channel businesses run the risk of losing contracts if they fail to comply, or even difficulties in recruiting talented staff.

The changing landscape is already creating obstacles for organisations across many industries, with 10% of Technology Channel respondents admitting that they had lost a contract or tender because they could not demonstrate their business' sustainability commitments. With sustainability now a priority across the Technology industry, this number is predicted to rise significantly over the coming years.

The likes of health and safety, working conditions and information security are all key to creating a positive and sustainable working environment, so Technology Channel companies need to demonstrate their use of innovative technologies and how they are tracking ESG objectives. This includes supporting their partners and customers in their transitions to becoming greener, more sustainable and increasingly efficient, all while embracing digital transformation across their own business.

With so much to contend with, this year's Technology Channel Confidence Index aims to provide unique insight into the current state of play for ESG across the Technology Channel. Through an analysis of plans for the next 12 months, Agilitas aims to provide knowledge and ideas that will enable Technology Channel leaders to balance ESG responsibilities and help to shape the blueprint for greater accountability and impact across all areas of sustainability.



Sustainability is just one part of the ESG puzzle

A VISION FOR A SUSTAINABLE FUTURE

The basis of this year's Technology Channel Confidence Index builds on the findings from previous years. The insights explored within this report draw upon research conducted with UK Technology Channel business decision-makers to discover how optimistic or pessimistic they feel about the year ahead.

The timeliness of this report is twofold. Not only must we delve into these findings to illustrate a path to sustainability, we should also reflect on how Technology Channel businesses have solidified their resilience as the world continues to emerge from the global pandemic which began in 2020.

Despite such tumultuous circumstances at the time of the survey, Technology Channel leaders remained steadfast in their optimism that the ecosystem would weather the storm of change, with confidence standing just a fraction lower in 2021 than pre-pandemic levels.

Naturally, many businesses were forced to double down on their resilience strategies, with almost a quarter of the Technology Channel (24%) respondents answering the maximum of 10 when rating the impact of COVID-19. It is important to consider the lasting effects that the pandemic period will have on the Technology Channel. For many, it has shifted mindsets and paved the way for more purposeful decision-making. However, rather than dwell on what has come before, we must use this as the catalyst to look ahead to the new challenges and opportunities we now face.

Last year's report introduced sustainability as a standout theme for the first time. We made a positive discovery that environmental issues were already front of mind for many Technology Channel leaders. When asking respondents how important sustainability is to their business, they gave a collective score of 7.8. Of that number, one-quarter of all total respondents answered the maximum 10, being 'very important'.

As we move at pace towards the risk of irreversible climate damage, we will unpack the many ways Technology Channel businesses are implementing change, evaluating the current attitudes and future ambitions that will drive the sustainability movement forward. However, as we outlined in the previous section, the term 'sustainable' means far more than environmental commitments. In line with this critical focus, we have introduced a number of new sub-themes aligned to the planet, people and partners. New for 2022 are: Culture, Leadership, Globallocal, Purpose, Alliances, and Values.

There is something to be said for the determination of the Technology Channel to improve their green and sustainable policies and adopt eco-friendly processes throughout the supply chain. This report aims to explore the key areas to build a roadmap that ensures a bright and more sustainable future for all those businesses involved with the Technology Channel.

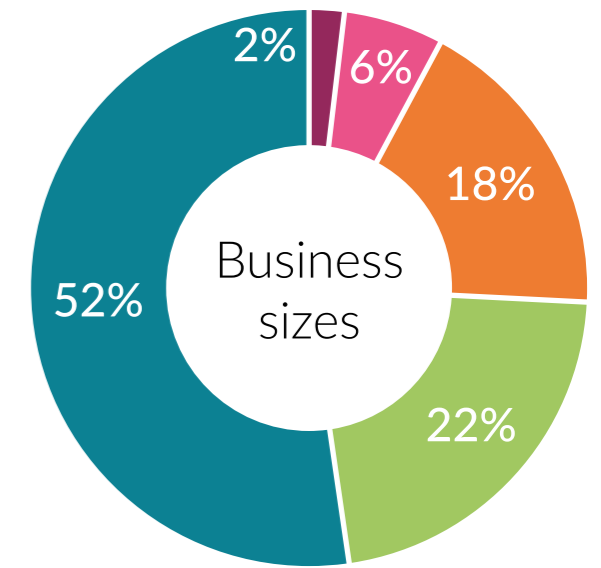
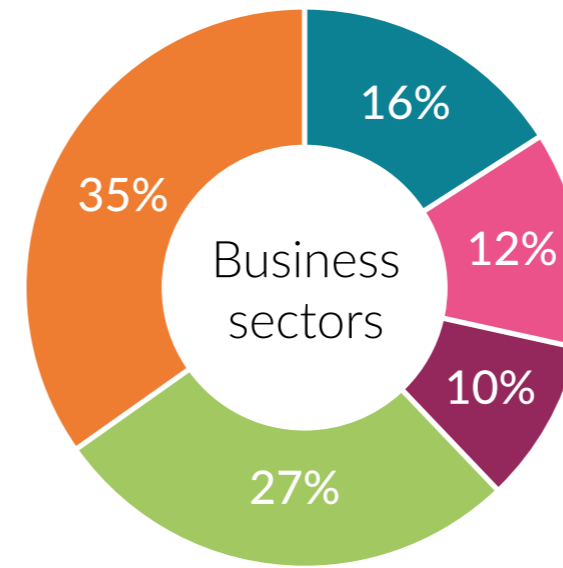


What's a sustainable future?

DEMOGRAPHIC BREAKDOWN

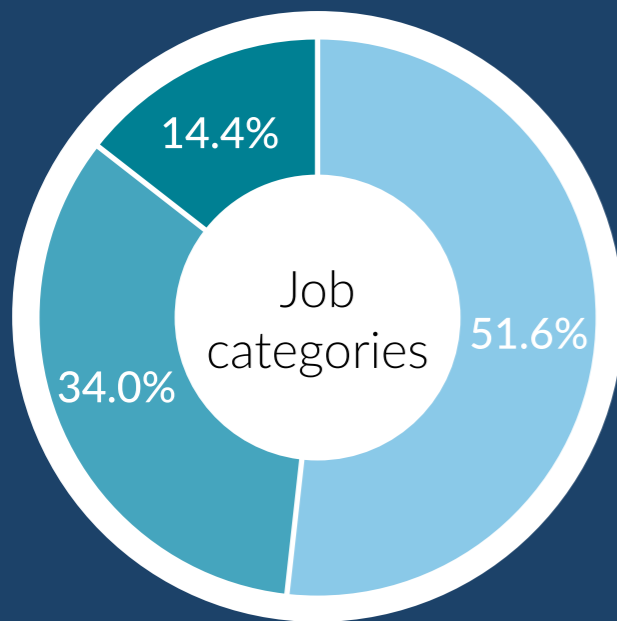
In order to contextualise the results of this year's report, we will first provide an overview of the members of the Technology Channel sector who took part in the latest research.

As is customary for the Technology Channel Confidence Index, the respondents surveyed were 250 decision-makers from UK-headquartered channel businesses, with an annual turnover of over £5 million.



- MSPs
- Independent Software Providers
- IT Resellers
- IT Distributors
- Tech Solution Providers

- Under 50 employees
- 50 - 99 employees
- 100 - 249 employees
- 250 - 500 employees
- More than 500 employees



- C-level and business owner
- Senior level decision maker
- Mid level decision maker

More precisely, the job roles surveyed were:



THE TECHNOLOGY CHANNEL CONFIDENCE INDEX

This Technology Channel Confidence Index report is designed to measure the UK and Global Technology Channel's attitudes to industry trends and offer commentary on future-proofing the businesses. This barometer benchmarks levels of optimism and confidence in the Technology Channel across a range of priority areas, which is intended to give a prediction for the future direction of the market.

The reports are designed to act as a unique point of both reference and reflection for the sector and investigate key areas which impact our industry. To achieve this, we asked decision-makers in the Technology Channel what their feelings were, with regards to a range of different key themes and trends - the results of which will be discussed in more detail within this report. In order to draw insight and comparison between the annual findings, we asked decision-makers across a range of Technology Channel businesses how confident on a scale of one to 10, they felt in the market and the future success of their company over the next 12 months.

To ensure a big picture view, we investigated attitudes to a range of topics, including transformation, relevance, globalisation, collaboration, technology, innovation, disruption, finance, political factors, regulation, sustainability, customer experience, resilience and productivity. However, as previously mentioned, this year introduces new themes to be explored that align to the collective push for sustainability, which we aim to benchmark going forwards.

By exploring the level of optimism in a range of subjects on an annual basis, we have created a quantifiable way to measure and monitor confidence across the Technology Channel.

Those who have read past instalments of the Index may recall that the overall level of confidence in the future of the global Technology Channel sat at an impressive 7.4 out of a possible 10 in 2021. Our latest index comes at a poignant time in the UK Technology Channel's history as we emerge from the shadows of global events to build resilience for the future.

We are proud to report that confidence in the future of the Technology Channel is on an upward trajectory in this year's Channel Confidence Index, climbing to 7.8 out of 10 - the highest recorded by the Index to date.

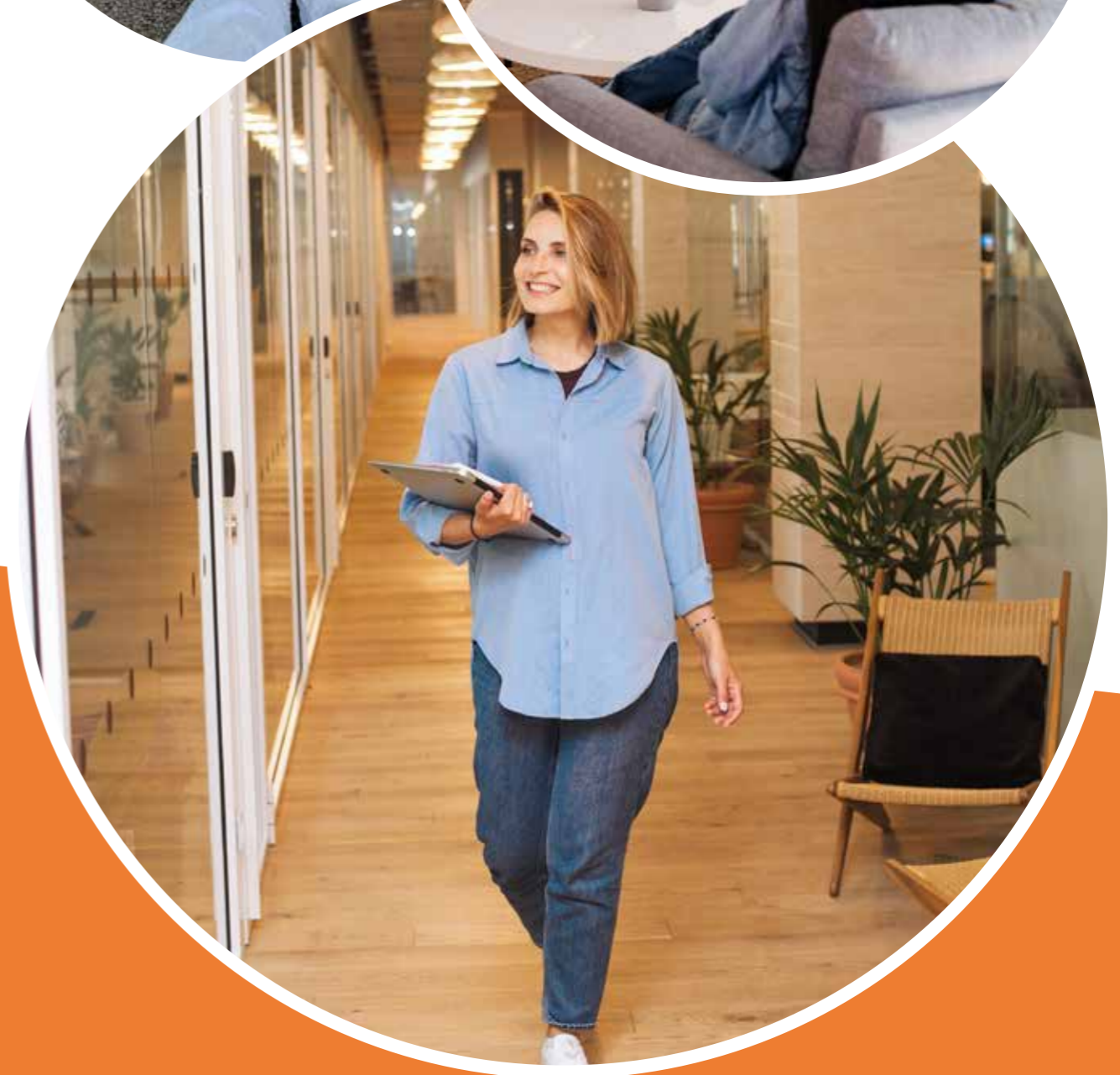
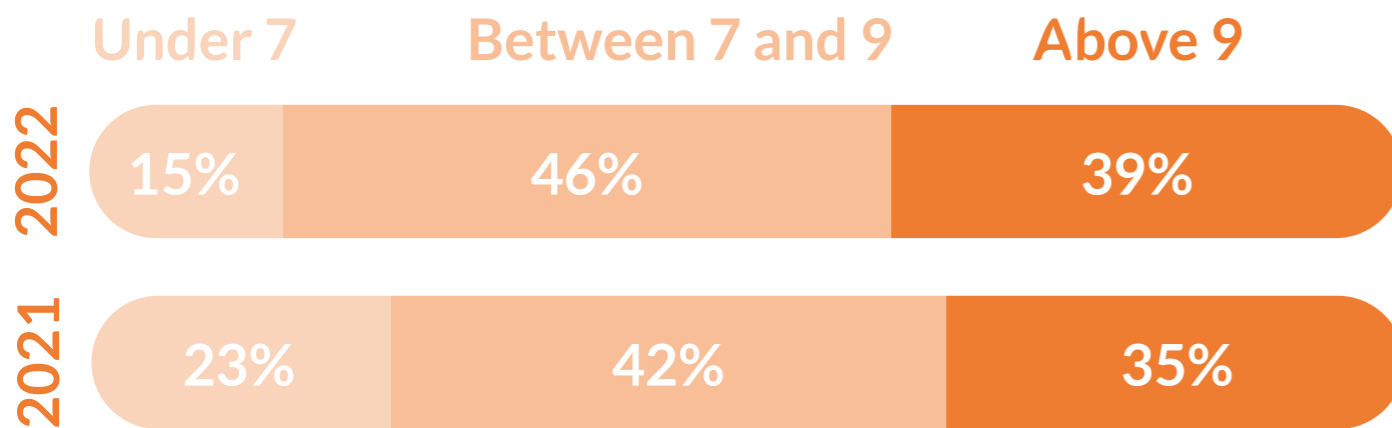


Confidence is at an all time high!

BRIGHTER OUTLOOK, BRIGHTER FUTURE

Kicking off this year's Technology Channel Confidence Index, we will once again start by exploring levels of confidence at the broadest level. When thinking about the future success of their own company over the course of the next 12 months, Technology Channel decision-makers were highly optimistic, with a combined score of 7.9.

Where 10 was 'very optimistic', 85% of respondents rated their confidence at 7 or above, with 39% of that number scoring either 9 or 10 - the highest score in this category since the Index began. When comparing the two, the data shows that senior decision makers are slightly more confident in the future of their own business, than the Technology Channel as a whole.



Channel decision makers are more optimistic than last year, yes!

HOW SECTORS ARE RESPONDING

Last year revealed a complete role-reversal between the MSPs and IT Distributors when asked to rate their confidence about the future of their business in the current market, scoring 6.9 and 7.9, respectively. While this trend continues in 2022, the results show a huge increase in optimism amongst MSPs, with barometer readings rising from 6.9 to 7.7 year-on-year.

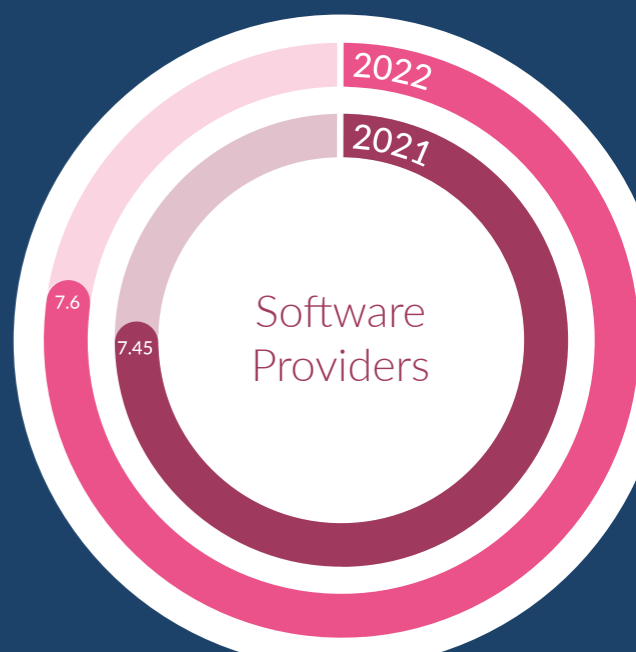
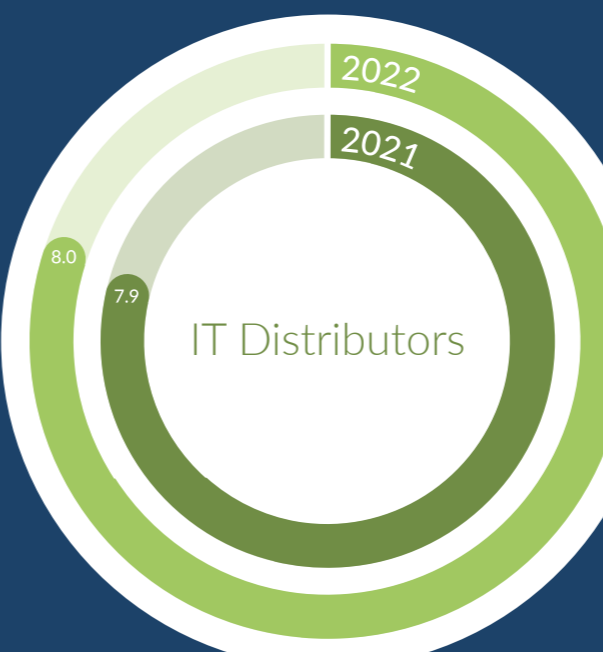
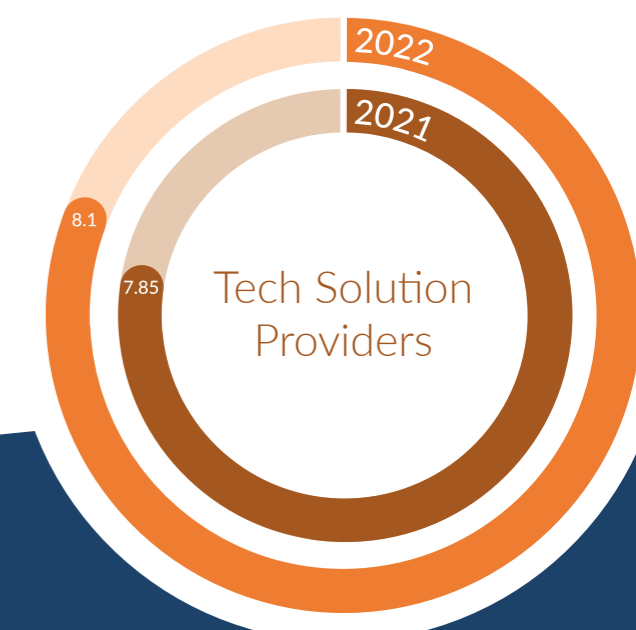
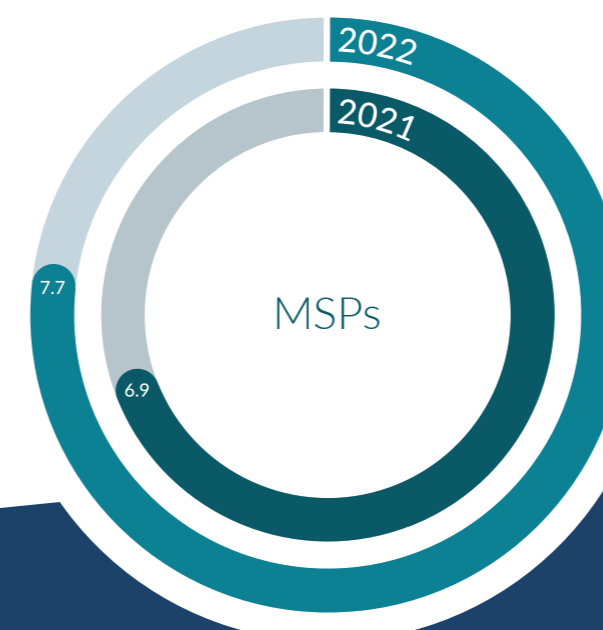
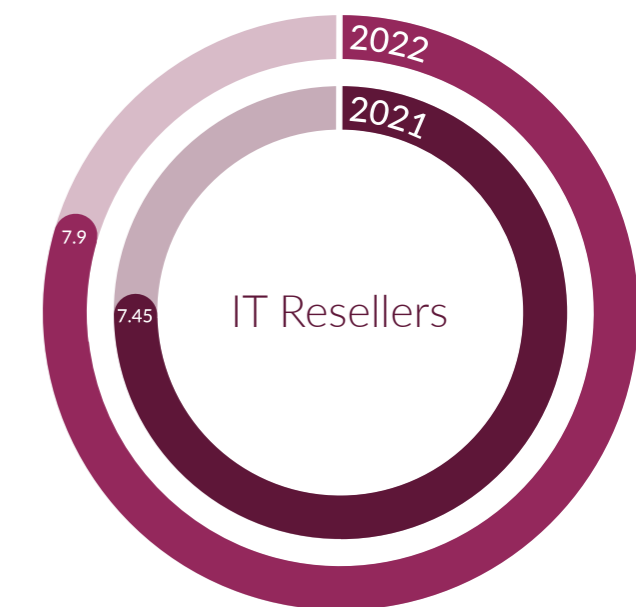
In the last two years, many MSPs found themselves faced with many unforeseen challenges and were forced to pivot their business models at speed in order to meet new customer demands and maintain their value, in a time of vast cuts in expenditure on maintaining traditional office IT infrastructure in response to vast remote working. While confidence in their own business remains below the industry average (7.9), this significant climb in optimism for the future is extremely positive. It shows that MSPs have not only been able to weather the storm for change, but have been able to reinvent the way they operate and serve customers to emerge stronger for the future.

Confidence amongst IT Distributors also showed a slight increase to 8.0 for the year ahead, but were overtaken by General Technology Solutions Providers, who collectively ranked their confidence levels at 8.1 (increasing from 7.85 in 2021). This is particularly interesting to note and could be viewed

as a reflection of the ongoing demand for IT hardware and technology solutions amidst accelerated digital transformation efforts and more permanent hybrid working models.

In fact, confidence in the future of their businesses increased across all sectors, with optimism levels from Independent software providers climbing from 7.45 in 2021 to 7.6 for the next 12 months and IT resellers also feeling more confident at 7.9 this year, compared to 7.45 in 2021. While Independent software providers were the least optimistic group by a small margin, the uplift across the board can be interpreted as a sign of better things to come for all business types.

SECTORS

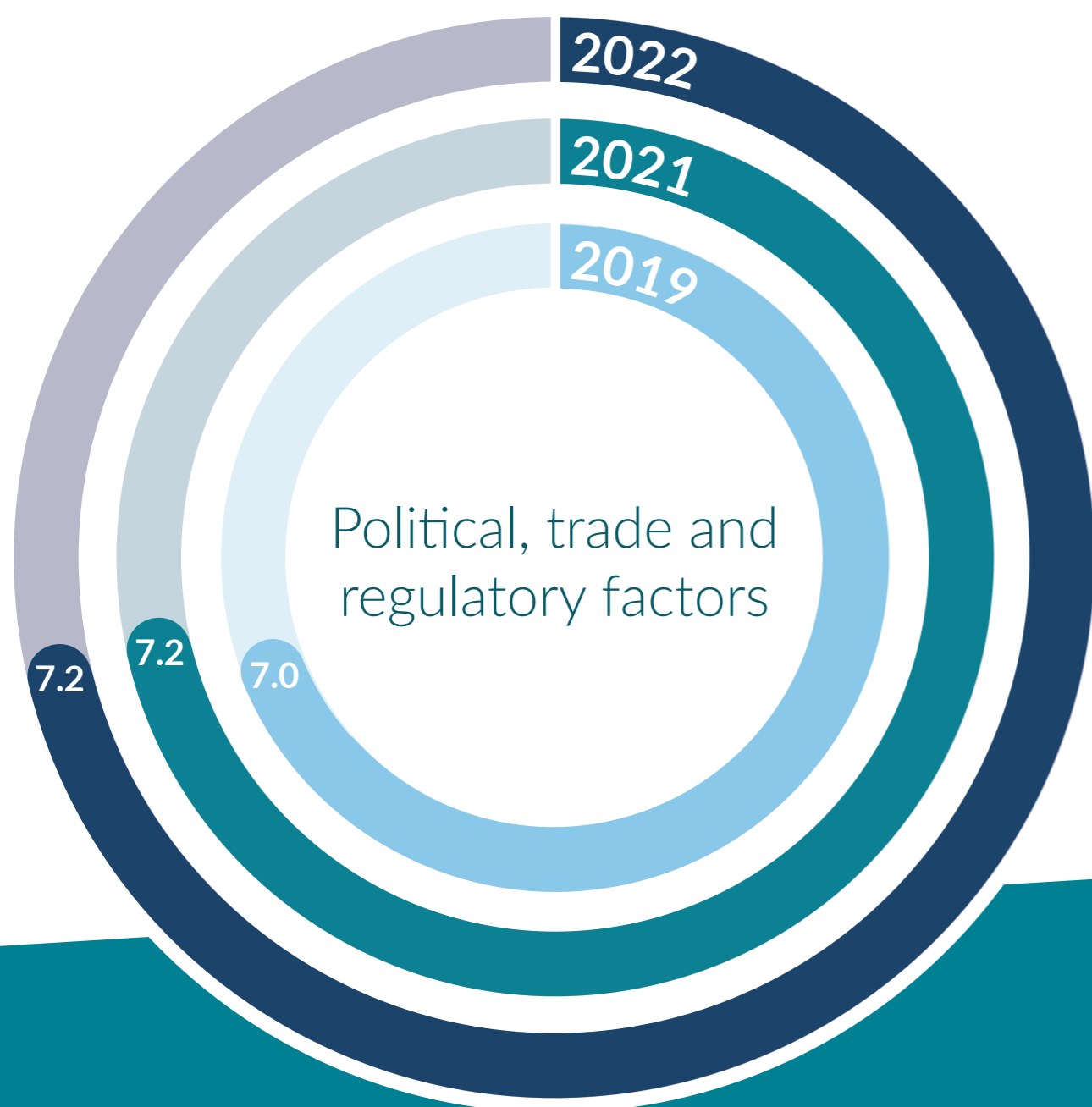


MSPs saw the biggest increase.

THE FORCE OF EXTERNAL FACTORS

For 2022, the levels of optimism recorded in this area were largely unchanged from last year, with confidence in managing political, trade and regulatory factors sitting at 7.2 out of 10, where 10 is very optimistic. Last year this was split into two areas with confidence in withstanding political and trade factors at 6.8 and regulatory changes at 7.2.

Interestingly this year, there was a large disparity between different departments in regards to optimism surrounding external factors. Whilst Business Owners and MDs were typically more optimistic, sitting at 8.1 and 7.5 respectively, their colleagues in Procurement and Service were more pessimistic, scoring an average of just 5.2 and 5 out of 10. Over two years on from the official start of Brexit and UK businesses are still very much coming to terms with this shift. You could argue that many are now only beginning to fully comprehend the long-term effect that the departure from the European Union will have on their business. Procurement teams are more likely to be directly affected by trade and regulatory changes in their day-to-day lives and with huge changes to supply-chains post COVID it is perhaps unsurprising that they are less optimistic.



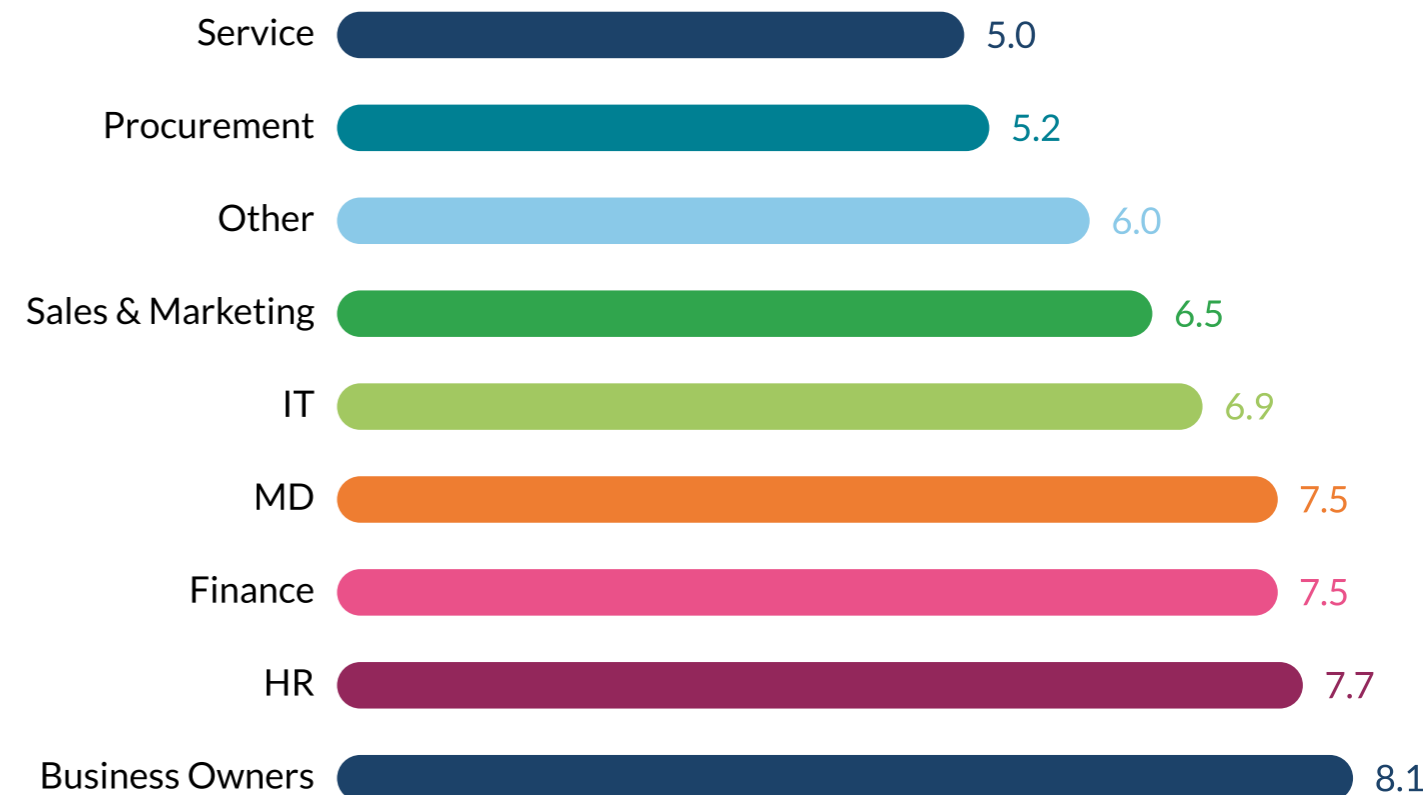
For the Technology Channel specifically, impacts on global supply chains in the wake of Brexit have proven a harsh reality. These latest findings are perhaps a reflection of the continued disruption and uncertainty for many, as decision makers grapple with its long-term challenges. Later in this report, we will explore exactly what the supply chain of the future will look like and more importantly, who is leading from the front when making change.

Service teams were the most pessimistic out of all the respondents surveyed when it came to considering the impact of external factors on future business success. As the front line to dealing with the disruption that external events such as COVID-19, the global chip shortage and recruitment issues have

presented, it is understandable why Service teams may be more cautious as they face the challenges of the next 12 months.

Later in this report we discuss the importance of creating the right company culture, with communication from senior management featuring in the top 5 factors to improve culture within an organisation. Business Owners and MDs recognising that other employees may be more pessimistic than themselves and building an effective internal communication strategy to restore confidence, could avoid additional problems when it comes to retention and productivity of their staff.

CONFIDENCE LEVEL PER BUSINESS AREA



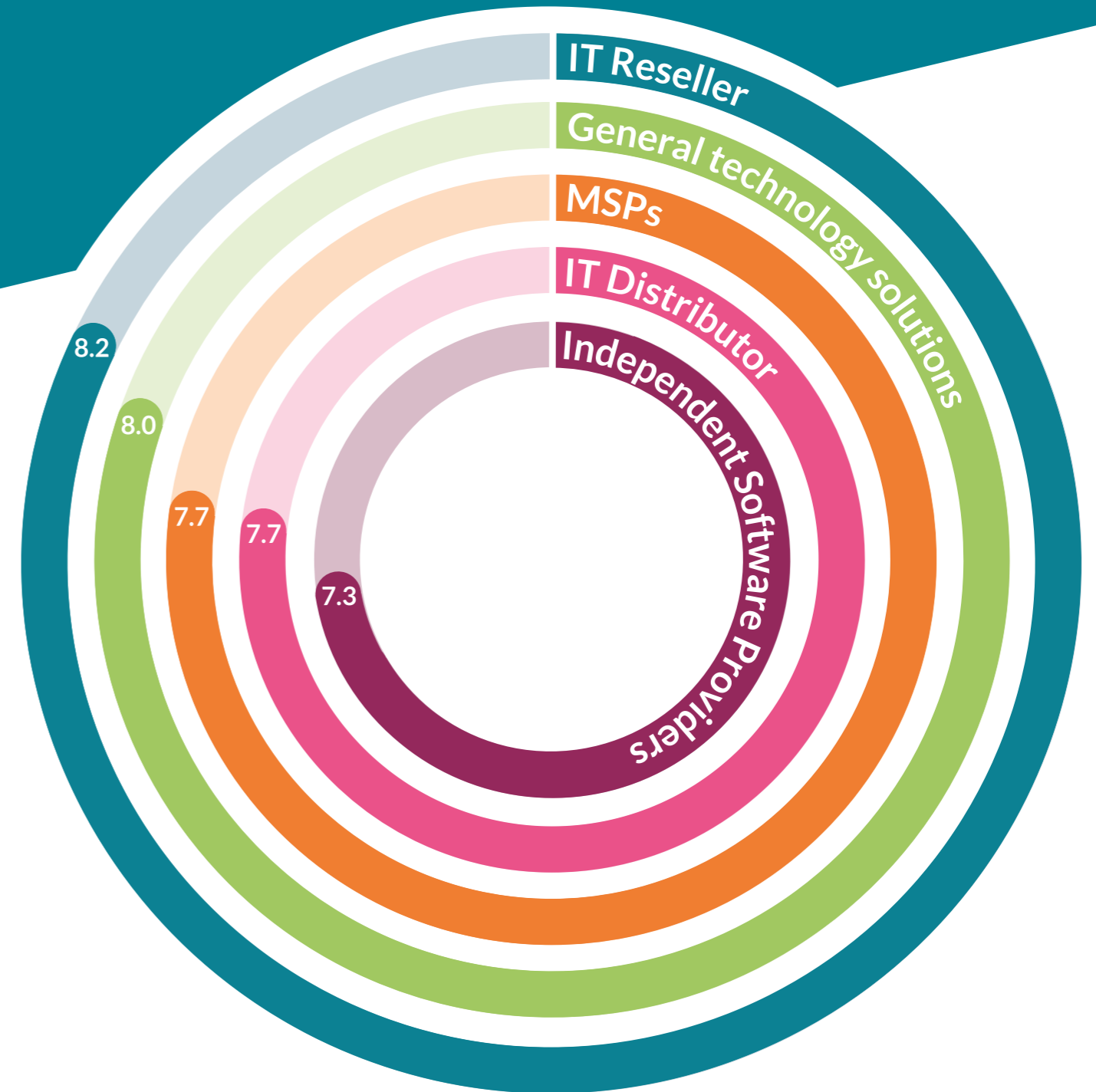
Are business owners out of touch?

In this year's study, we broadened our investigation surrounding external influences to understand how decision makers are building resilience to unavoidable change. In 2021, over three quarters (76%) ranked the importance of resilience 8 and above. The Technology Channel also showed strong confidence in improving resilience throughout the course of 2021, with 64% ranking their optimism at 8 and above on the scale. These results came at a poignant moment in time for a Technology Channel that was still dealing with the vast disruption caused by the global pandemic.

This year saw continued optimism in building a more resilient business model to survive external factors, with confidence in this area reaching 7.8. There is something to be said for this level of confidence amongst senior decision makers; once again as in previous index reports, individuals with the highest level of visibility and control over the course of business decision making and direction.

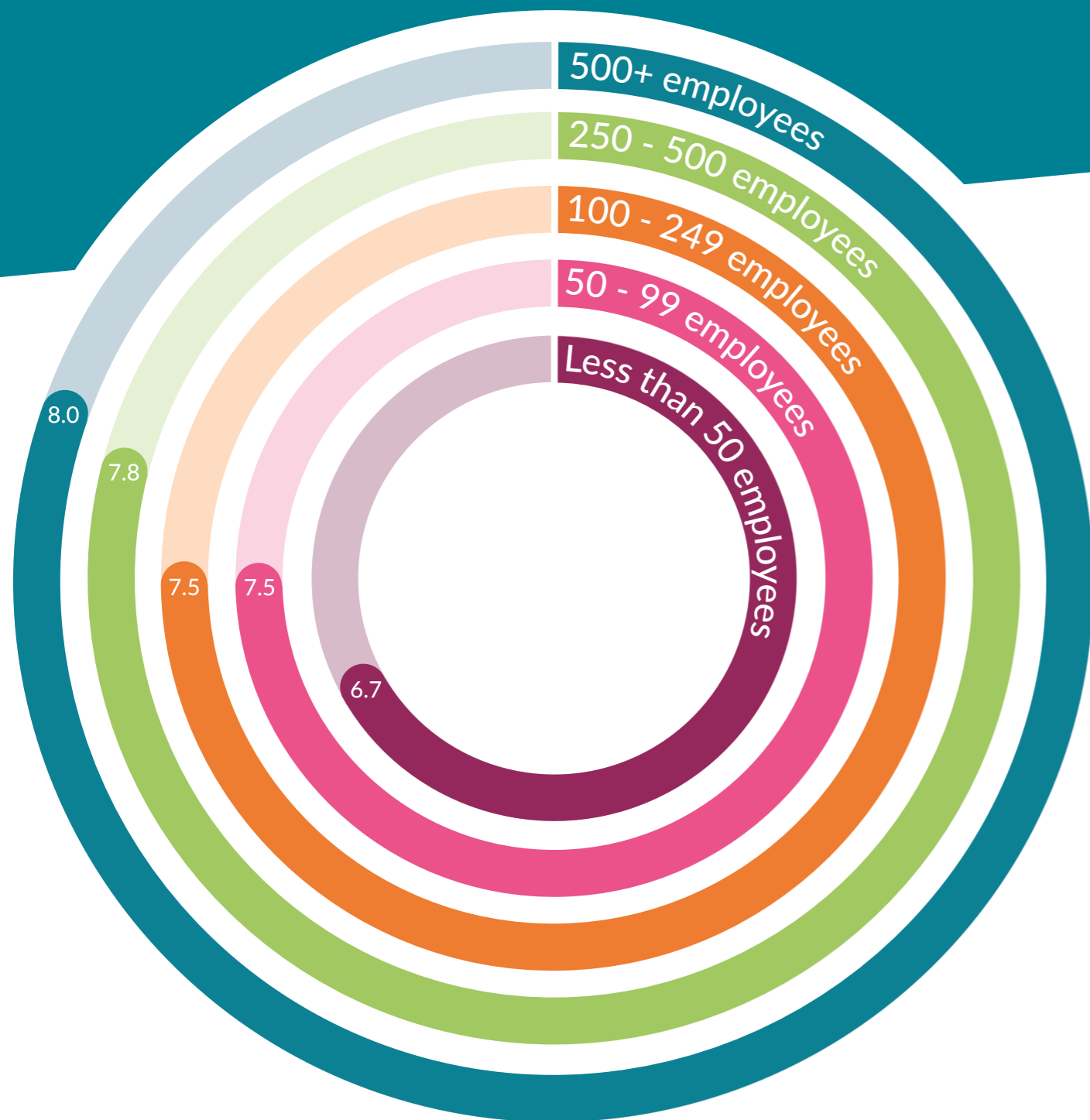


Looking into the varying market sectors, it is clear there is also a difference between how IT Resellers (8.2) and General Technology Solutions (8.0) feel in terms of their resilience and how they have been impacted by external factors, when compared to Independent Software Providers (7.3).



IT Resellers feel so much more confident than Independent Software Providers

While the total average showed a positive outlook on the future of resilience, the findings indicate some clear disparities in thought when broken down by company size. According to the findings, the larger the business, the more positive they are in their ability to remain resilient in the year ahead. Large Technology Channel businesses with more than 500 employees were not only significantly more optimistic about their resilience to external factors, but were the only group to score above the collective average at 8.0. As we move down in employee headcount, this number declined steadily, with small businesses with 10-49 employees showing the lowest rate of confidence at 6.7. The impact of company size on resilience has garnered many column inches across the Technology Channel during COVID-19.



In April 2022, 15 partner leaders came together for the CRN Rising Stars Dinner to share perspectives on the bifurcation between industry powerhouses recording huge growth and smaller players which, as **Doug Woodburn, Head of Channel Research, Incisive Media reports**, "often sacrificing revenue at the altar of services and profitability."

"This is not a trend most of the sub £70m-revenue partners present were worried about, with some questioning whether the growth of their larger peers is sustainable," Woodburn writes.



Industry Voices from the CRN Rising Stars Dinner

"I think the bigger players' business models have been more suited to Covid - they have the bigger teams of telephone salespeople hitting customers," agreed **Flow Communications' CEO Etienne Greeff**.

Scott Nursten, CEO, ITHQ, felt that some smaller partners have failed to move with the times, however, "I think that growth isn't just about scale - obviously those big businesses have scale and attract business through price - but I think a lot of the smaller businesses maybe haven't adopted the new wave of thinking and new technologies. A lot of the competitors we see are still flogging ten-year old horses and because of Covid the technology landscape has shifted quite dramatically and not everyone has responded as well."

BRAVERY BUILDS RESILIENCE

The pursuit of greater resilience takes many forms, however, it will always be shaped by the attitudes and actions of people. Not only is business resilience essential to maintaining operational strength, it is also crucial to the livelihoods of employees. In order to make sustainable change, those at the forefront of decision making have the power to determine the right course of success and adapt to new challenges or circumstances.

Over the last two years, the need for strong leadership capable of making big decisions has in many cases been the difference between survival and failure for businesses around the world - and the Technology Channel is no exception.

Against this backdrop, Agilitas introduced leadership as a new focal point for the Technology Channel Confidence Index. Specifically, we asked Technology Channel leaders to rate how important it is for their business to grow an environment of trust where leaders are encouraged to be brave/bold with ideas. The results revealed a significant show of hands amongst respondents in this area, with an overall score of 8.1 out of 10.

The importance of doing so was felt most amongst those operating in the most senior positions. 33% of business owners and 19% of Managing Directors/CEOs ranked a maximum 10 out of 10. This is an extremely encouraging insight. If those at the top are willing to give their leadership teams licence to be brave with their decisions and put trust in their ideas, we will see a more innovative and progressive Technology Channel as a whole.

With such high stakes involved, it can be a challenge to afford leaders the trust and responsibility to find critical solutions that work for the betterment of business and people. When asked which measures

Channel businesses should adopt to empower leaders in their business, creating a culture that encourages vision and accepts mistakes received the highest vote (74%), followed by regular training and development (64%) and creating a collaborative environment with other decision makers (63%).

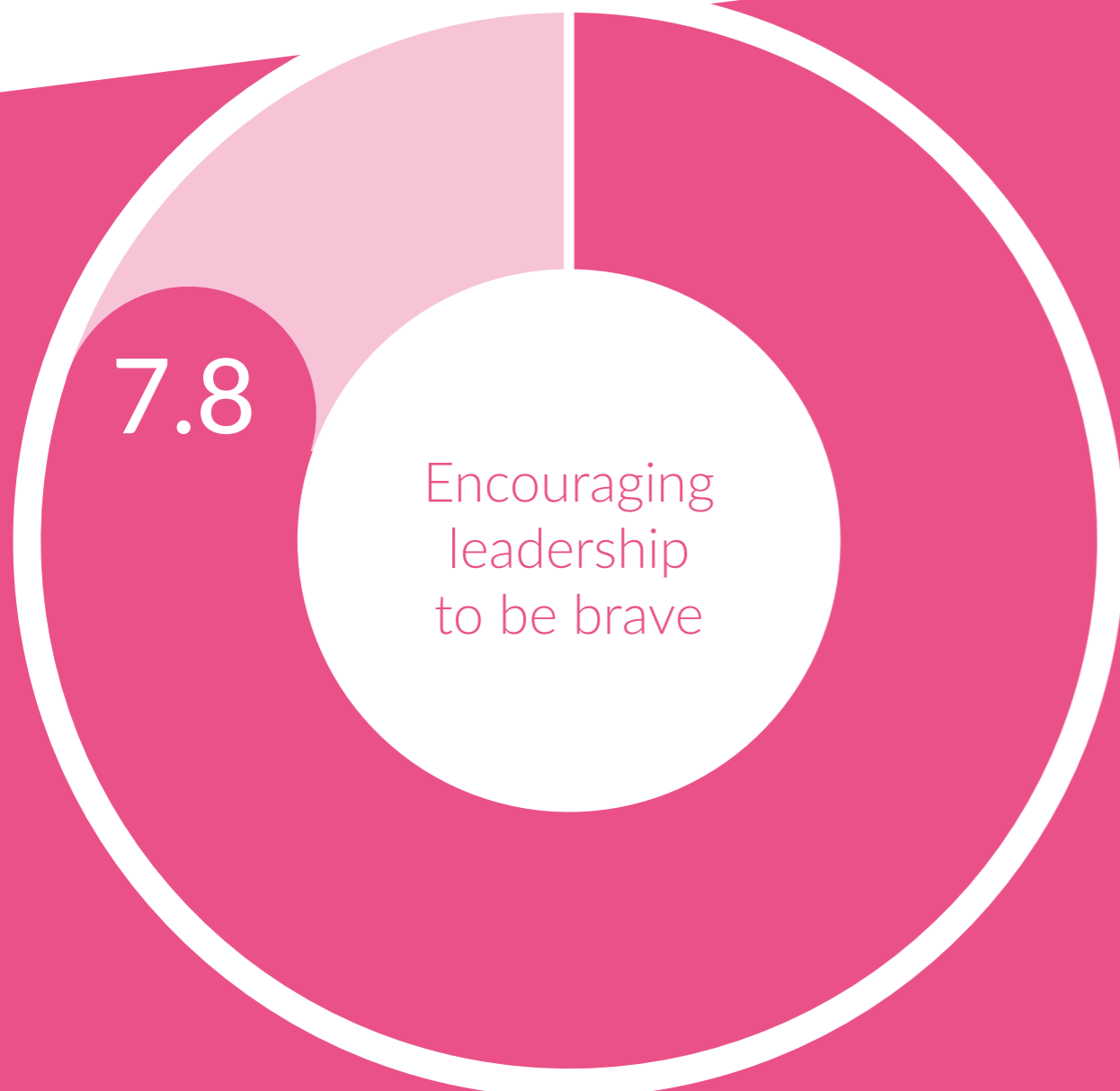
It seems leaders are recognising the need for a set-up that not only gives those with decision power access to conversation and skills, but also allows them freedom to 'think big' - and to some extent - prepare to fail, in order to learn and improve for the future.

Agilitas says:

The last two years have brought about unprecedented levels of change for modern business leaders. Not only are they still guiding their organisation through the lasting impacts of Brexit, but the global pandemic forced many (if not all) leaders to make tough decisions that impacted their staff. All employees turned to their senior leaders for guidance and direction, and this had to be navigated and communicated correctly to instil confidence.

It is in such trying times that we see the best and worst in leadership. These findings paint an interesting picture about how modern Technology Channel leaders want to operate, with more accountability, collaboration and responsibility, but in a supportive environment which accepts mistakes and allows room for growth.

In order to make this a reality, this culture must be created at the highest level and filtered down to the wider leadership team. It is very positive to see so many business owners and CEOs already believing in this shift to the highest level of importance. As we emerge from a difficult period and enter a new era of sustainable business, it is crucial that businesses take stock of lessons learned and implement necessary change to pave the course of leadership in the future Technology Channel.



STRIVING FOR SUSTAINABILITY

Sustainability in an environmental sense was a new addition to the Channel Confidence Index in the 2021 report. Since then, the critical need for businesses in the Technology Channel to adopt eco-friendly practices in the supply chain has moved from 'nice to have' to a point of critical need and action.

Today, sustainability credentials are increasingly at the fore when Technology Channel businesses look to evaluate the partnerships they form and how they hold partners to account (more on this later). Despite its high place on the agenda, this year's report unveiled a surprising decline in optimism about the Channel's ability to adopt eco-friendly processes in the supply chain. In 2021, confidence in this area stood at 7.8, a figure which lowered to 7.6 for the year ahead.



While the score remains generally high, this year-on-year decrease poses some interesting food for thought. Last year, many Technology Channel businesses were at the start of their sustainability journey and now, confidence may have wavered slightly because they are in the thick of making their objectives a reality. That reality means the honeymoon period is behind us and now the hard work of building a long-term sustainable relationship with our customers and supply chain partners begins.

What people thought was a tick box exercise is now unfolding to be a company-wide mindset that must be backed up with governance, measurement and constant investment. In years before, businesses could undertake baseline activities such as planting trees, branding them as offsetting initiatives with a claim to be sustainable.

We have quickly learned that this is no longer enough. Now, businesses are not only accountable against their own targets, but are having to prove their figures and benchmark against official business sustainability ratings, using assessment-based methodologies such as EcoVadis. Sustainability is no longer something you can claim through small actions or gestures; it requires a complete transformation of business processes and even deeper collaboration with partners. As a result, becoming sustainable without significantly increasing costs is proving a real challenge.

The future of the planet is everybody's business, but it is also true that some are moving faster than others when it comes to making active changes across their business. Within this context, the slight decline in confidence in these areas is valid, and almost reflects the difficulties Technology Channel businesses now face in making change across entire supply chains and ecosystems.

Move from this... to this!





“Don’t panic, listen, collect data, set strategies”

INDUSTRY VOICE: **maintel**

Joanne Ballard, ESG Strategy and Compliance Director

How have your sustainability efforts evolved over the past 2 years?

We have moved from limited disclosure, which was required through the regulations we work to, towards embedding Environmental, Social and Governance (ESG) into everything we do across our business (and that journey is ongoing). This involves making it part of our company culture and widening our reach by understanding what is important to our key stakeholders, both internal and external and linking our activities to the UN Global Sustainable Development (SDG's).

2021 saw the launch of our ESG at Maintel website and the start of the Maintel Forest which enables employees to plant trees and we plant 25 trees for every 500 cloud seats our customers connect through us. 2022 saw the first publication of our Sustainable Business report and we are now working on low carbon products and services to enable customers to improve their environmental impact. In December 2021, we launched our volunteer policy enabling all team members to have 3 days paid volunteer leave per year to aid our local communities be that tree planting, litter picking or serving teas and coffees at a local support centre.

What have been the biggest challenges Maintel has faced regarding sustainability?

The number of regulations and frameworks that are present and due to be implemented and deciding which one/s are most relevant to Maintel and our customers. We aligned to the SDG's as they take into account what is needed across multiple regulations and frameworks, so we focus on the highest level.

How important is partner relations when it comes to sustainability?

Extremely – our partners have an impact on our ability to reduce carbon emissions, improve working conditions and build better communities. We need to work with our partners to ensure there is a full circular economy in place and identify improvements to assist in reducing the impact of production and transportation. For example; if you order 500 phones, do you really need 500 paper user guides, 500 plastic bags and 500 boxes? Working with partners, we can target and achieve environmental and social improvements that benefit us, our customers and local communities.

What would you recommend to channel businesses just starting out on their sustainability journey?

Don't panic - Listen – Collect data – Set strategies

The world of ESG can be daunting with the number of regulations, frameworks and ongoing changes, as more companies fall within the remit of the regulations or wish to move forwards with an ESG program of activities. However, it doesn't have to be. A good place to start is to understand what is important to your stakeholders.

Customers have regulations that they must adhere to, employees will have their own thoughts as to what is important, as will the Board. Collating all the thoughts enables appropriate strategies to be set and targeted. It's not about what one group thinks, it's about setting strategies across all areas. Yes, meeting the regulations is imperative but ESG is a movement for the future of people, planet and prosperity. The work we do now will form the basis of improvement in the future, or at the very least not making anything worse.

Companies have been reporting on their finances for years and reporting on sustainability is very similar. The information is available – start with Gas, Electricity and Transport (Scope 1 and 2) and build from there into Scope 3, working with suppliers and partners to set targets, implement initiatives and work together to improve the environment, local communities and supply chain working arrangements as a whole.

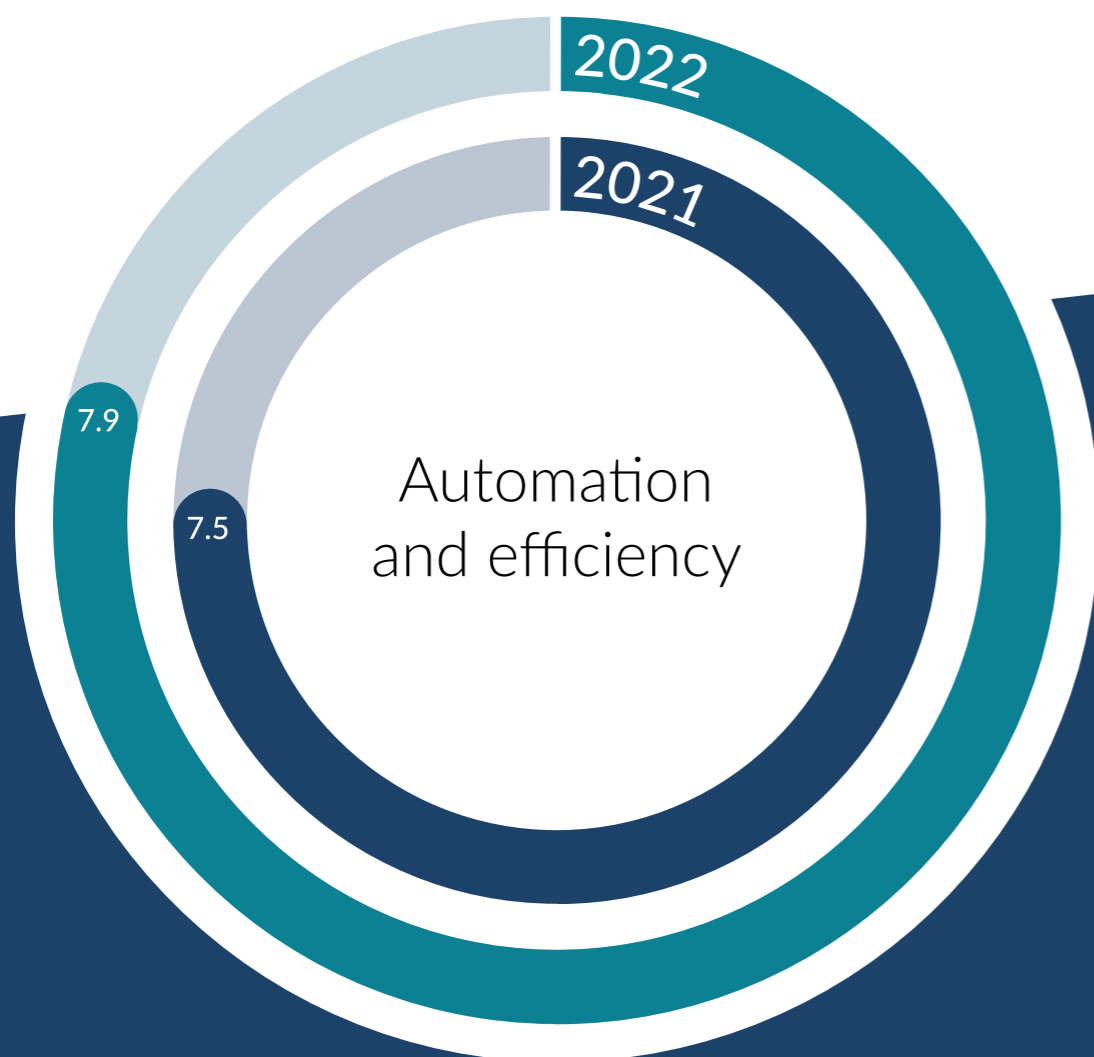
TECHNOLOGY DRIVING PRODUCTIVITY

Another core area of focus in last year's Channel Confidence Index was productivity. It goes without saying that productivity is a crucial determining factor for success in the modern Technology Channel. In an increasingly competitive market, customers and partners rely on the ability of their suppliers to work at speed in order to better serve their end customers.

This expectation has only exacerbated over the last two years, as new pressures demand even faster responses in moments of uncertainty. This shift was reflected in 2021, with Technology Channel decision makers exhibiting strong feelings towards the importance of productivity across their businesses, reaching 8.25 out of a possible 10 (where 10 was 'very important').

The term 'productivity' has far-reaching implications. However, in an age of digital transformation, it is now closely aligned with introducing automation and efficiency measures that empower employees by streamlining workflows and alleviating manual processes that enable them to focus on more high-value, complex tasks.

In 2021, respondents were asked to rate how strongly they believe that such solutions would improve productivity across the Technology Channel, showing a high confidence level of 7.5. Reflecting on the progress that businesses have made to accelerate digital transformation in the last year alone, it is no surprise that Technology Channel leaders are showing an even more positive outlook for the next 12 months, with confidence in automation and efficiency efforts climbing to 7.9.



Like many other sectors, the Technology Channel is faced with wider challenges that can impede productivity, such as talent shortages, transformation of workplace culture due to increased remote working and the aforementioned regulatory and trade implications. Based on these results, it seems as though automation and other technology-driven solutions are providing a much needed opportunity to bridge these gaps and allow teams to correctly channel their energy and resources to maintain productivity through periods of turbulence.



Streamline workflows and alleviate manual processes

CUSTOMER EXPERIENCE AT THE CORE

The ability to serve customers is naturally one of the largest catalysts for business change in the Technology Sector and beyond. Those familiar with the Channel Confidence Index will know that customer experience has been a core theme of the report since the very beginning, and exploration into this field continues in 2022.

To provide context around this year's results, we must first reflect on the state of customer experience in previous years. In the 2020 CONNECT to Transform report, customer centricity was a significant focus. When asked to what extent they viewed their business as being customer-centric, most respondents (81%) described their business as one that placed their customers at the heart of their model.

It would also be unwise not to mention the impact that the outbreak of COVID-19 has had on the Technology Channel's ability to serve customers in the last two years. Last year, our survey was conducted during the height of the global pandemic and our results illustrated the bearing that such an unprecedented event had on the Technology Channel's need to change in order deliver the best experience to channel partners and end users.

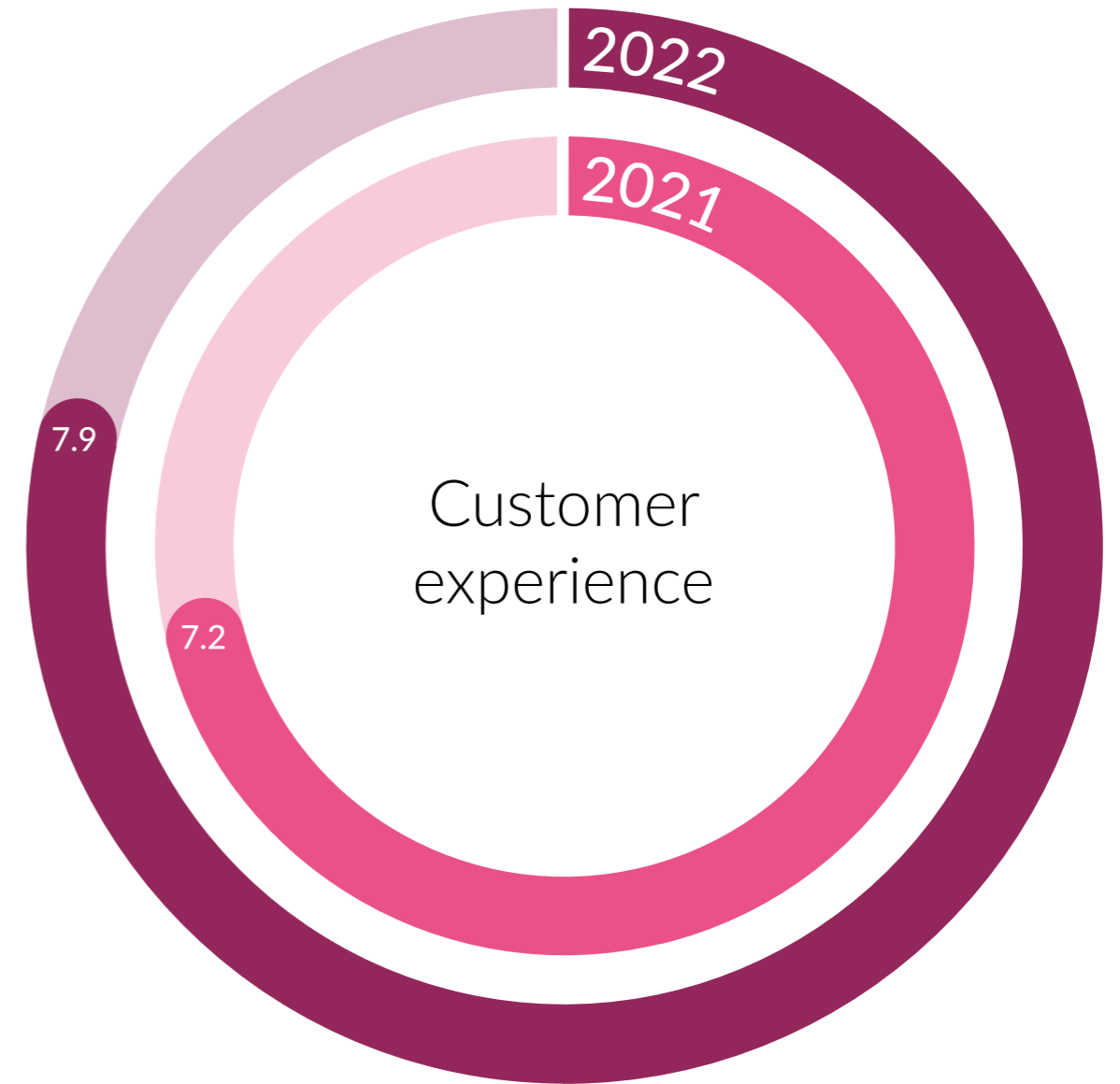
As a result, we found that 71% of respondents ranked the evolution of the customer experience at 7 and above, where 10 was 'very significant'. Despite this, its significance remained unequivocally clear with one third (33%) ranking its importance at a maximum 10 (being very important) and 41% scoring either 8 or 9.

In the fight for survival, many Technology Channel businesses switched to a more insular view of success, taking a damage limitation approach to internal challenges in order to minimise the impact on their employees. With that, the very definition of success changed from one benchmarked on customer

satisfaction, to a focus on simply keeping the business alive. This ultimately led to a sharp decline in optimism when concerned with meeting customer demands, falling to 7.2 in 2021 across the channel from 7.9 in the previous barometer, reflecting the critical challenges businesses were faced with during that time.

As businesses continue to overcome the final rippling effects of the pandemic era, customer experience is taking centre stage once again. When asked to rate their level of confidence in customer experience across the Technology Channel as a whole, we saw a return to pre-pandemic scores, climbing back up to 7.9 for the next 12 months.

Of those surveyed this year, 14% responded with a maximum score of 10 and just 6% offered a score of 5 or below. That said, maximum optimism levels surrounding customer experience have continued a downward trend year-on-year, falling from 16% in 2021. Due to the pandemic, many businesses have been focused on simply 'keeping the lights on', leaving customer experience without the true focus it requires. Now, many firms are playing catch-up.



However, where there was once a degree of leniency, Technology Channel companies can no longer blame COVID-19 for poor customer experience or falling short of Service Level Agreements (SLAs). This has led to a shift in focus from senior leaders, with many businesses working hard to define exactly what they want to be valued for, to get ahead of competitors and build customer loyalty.

Breaking this down by sector, IT resellers were significantly more confident in the Technology Channel's ability to define their value to customers, scoring at 8.5. This was followed by General technology solutions providers (8.2), Managed service providers (7.9), IT distributors (7.8) and Independent software providers (7.3). For the most part, there is a clear vote of confidence for the future of customer experience. As an ecosystem, it is imperative that we get it right in order to create an environment that works for the betterment of people, partners and the planet as a whole.

Can we still blame Covid for our issues?

ACTING WITH IMPACT

We began this report by addressing the new 'EVOLVE' era of the Technology Channel Confidence Index and the resulting introduction of new themes that aim to explore the growing emphasis on three vital areas as we strive for a more sustainable future; the Planet, People and Partners.

The next section will turn its attention to the new themes for 2022 to help create discourse around the challenges, mindsets and actions that will shape the Technology Channel in years to come.



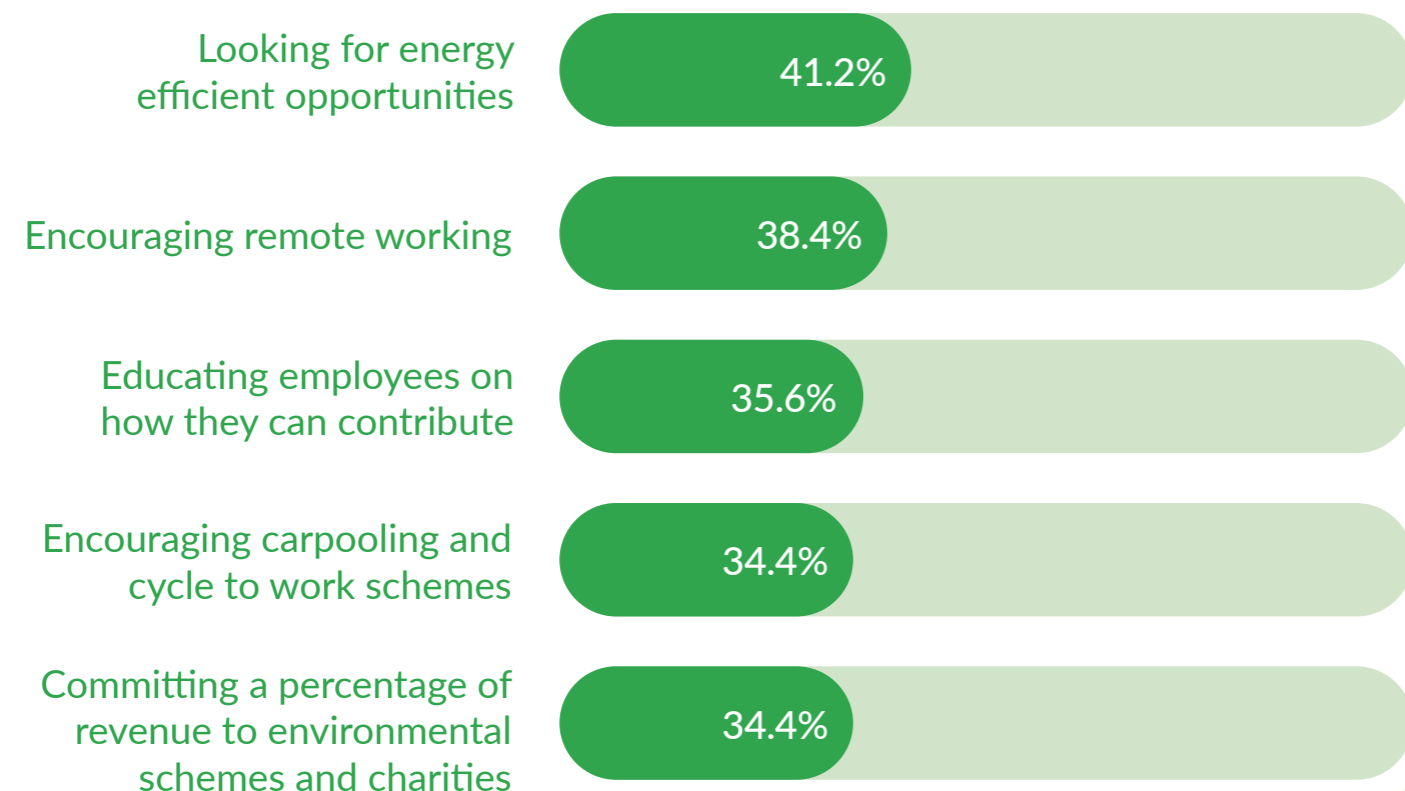
PAVING THE JOURNEY

Before embarking on any business journey, the first step is to define your objectives and lay out the necessary steps required to achieve these goals. When it comes to sustainability in all its forms, this process is vital to understanding how a business plans to make a difference, the course of action it will take to get there, and most importantly, who will play a part in this journey.

Defining a company's purpose and communicating it to team members, customers and partners is an important exercise, as businesses increasingly look to work with others who share the same values and ethos about the future of the Planet. For the purpose of this report, purpose is defined as 'acting with impact through eco-friendly processes to create a better, more sustainable future'. To understand the state of purpose, we asked respondents to rate how confident they feel about the Technology Channel's ability to achieve this in the next 12 months. The result was positive amongst decision makers with a mean score of 7.7 out of 10.

As our definition of purpose illustrates, paving a more sustainable future requires impactful and measurable action. In this year's research, we sought to explore the most common measures that Technology Channel businesses are taking to achieve their sustainability goals in the next 12 months:

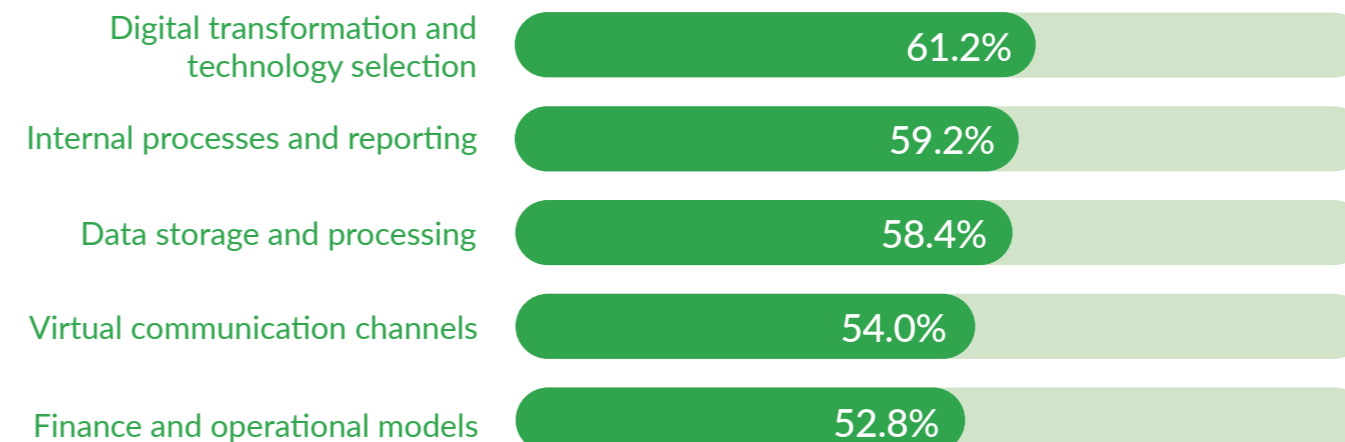
Top measures for creating a more sustainable future



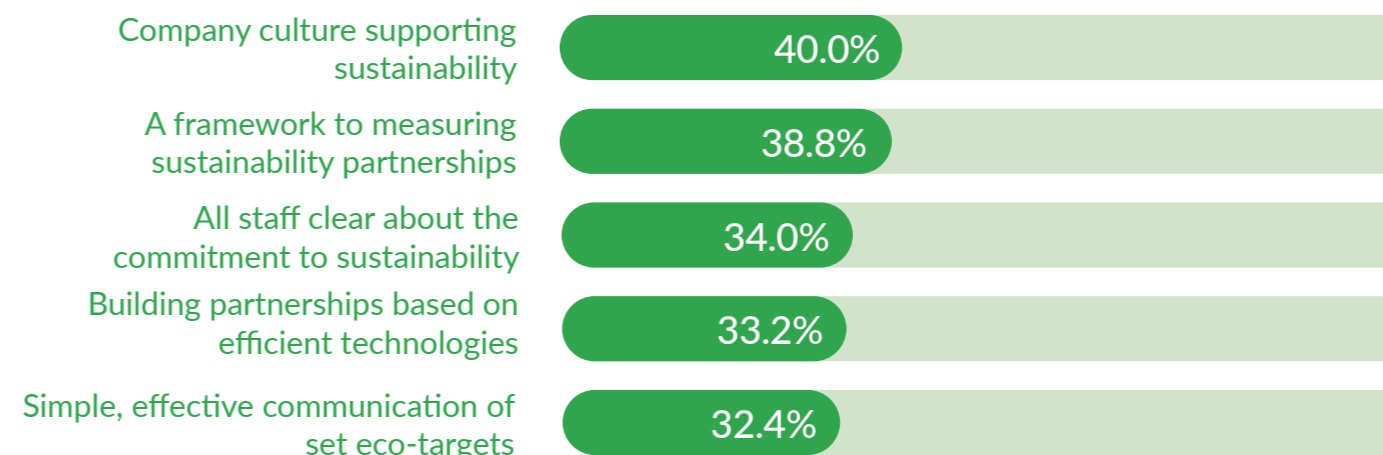
The extensive implications of ESG now require businesses to take a considered approach to evaluating their efforts and implementing change in the right areas, without creating unmanageable disruption for their teams and operations. Positively, channel leaders indicated that much of this work is already underway. When answering the statement, 'we are proactively evaluating our sustainable/ESG efforts across our business', confidence levels came in at a mean score of 7.8.

With many channel businesses taking action to improve their own environmental sustainability, the rate at which targets and initiatives are being implemented makes for an interesting view of the change happening now, and what's to come in the future. We asked Technology Channel decision-makers in which areas they are implementing change to measure their sustainability commitments:

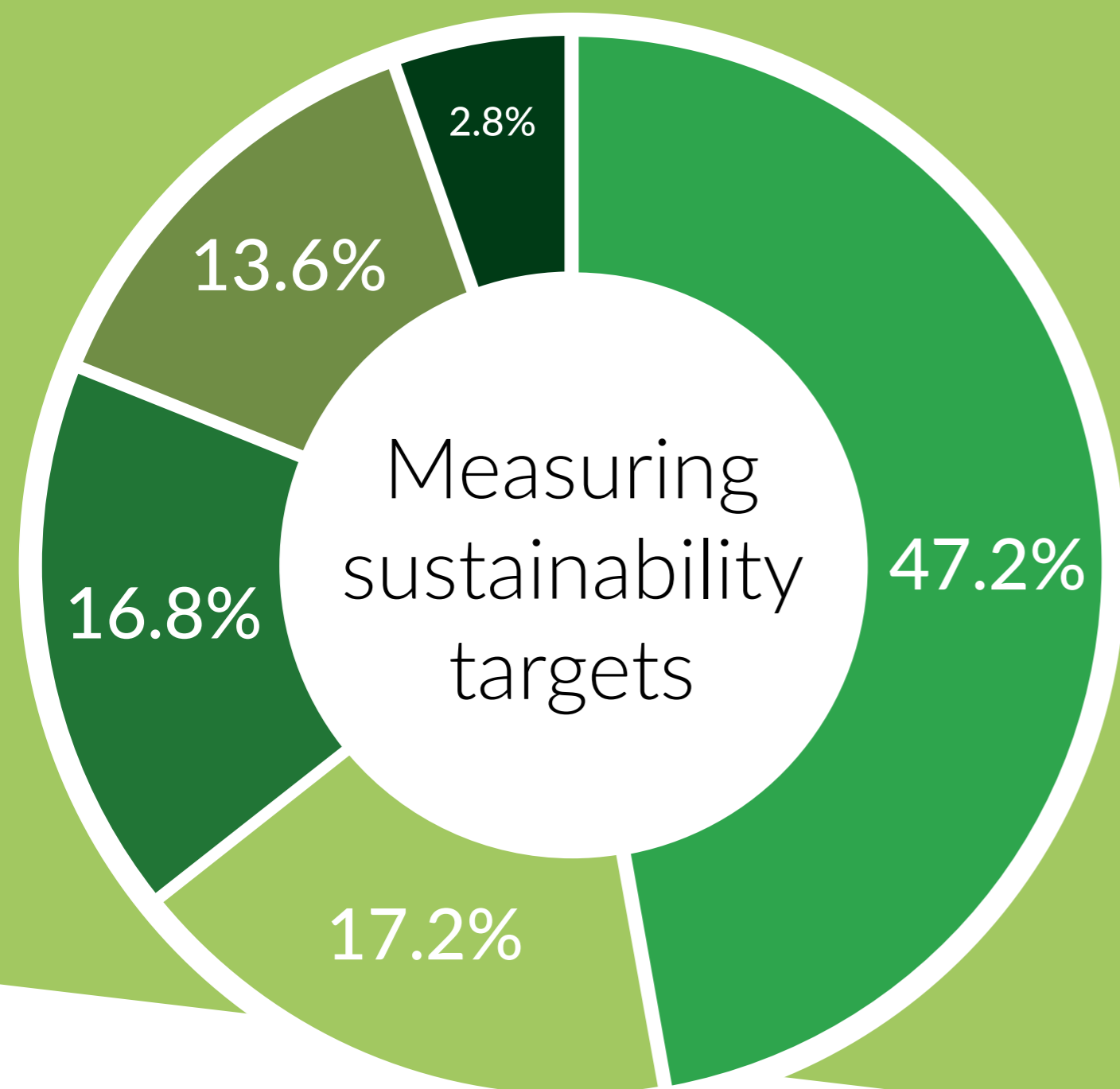
Top 5 sustainability initiatives



Sustainability: future ones to watch



Introducing more sustainable measures across a business is a huge step in the right direction, but is only truly valuable when their effectiveness is benchmarked and improved as a result. We asked Technology Channel leaders to share how if at all, their business measures its sustainability targets and found that the majority of firms are now measuring them every quarter:



- Quarterly
- Annually
- Less often than quarterly, more often than annually
- More often than quarterly
- Less often than annually but at least once every 5 years

Promisingly, nearly 2% of respondents answered 'not at all' when asked how often they measure sustainability targets and less than 1% stated that their business has no sustainability targets in place to do so.

Agilitas says:

It is clear that many Technology Channel firms are already making steady in-roads to improve their sustainability credentials, by evolving their internal processes, data storage, communication and technology selection. The real challenge now lies in creating a company-wide culture and infrastructure that allows them to maximise resources and encourage participation in every corner of the business, whilst bringing employees on the journey.

This also plays out at an industry-wide level. For example, many large businesses across the sector have experienced significant growth since the pandemic, but are using partners who may not practice what they preach at a corporate/ shareholder level. The future requires the entire supply chain to work together to become the most sustainable as a whole. Where sustainability was once perceived as a company-specific objective, businesses must now consider the whole supply chain when they measure their sustainability efforts, treating suppliers as an extension of a business to unite in common goals and shared responsibility.

That said, the data shows a wide understanding amongst leaders that true sustainability cannot be achieved in isolation. It requires close collaboration with external eco-partnership and channel partners that share the same vision, as well as a significant review of transport, logistics and travel models. It is important to evaluate all aspects of your business, processes and relationships and set goals to remain accountable. To see so many companies committing to invest in eco-friendly processes that can be measured and built upon is an extremely positive indicator for the future of the Technology Channel.

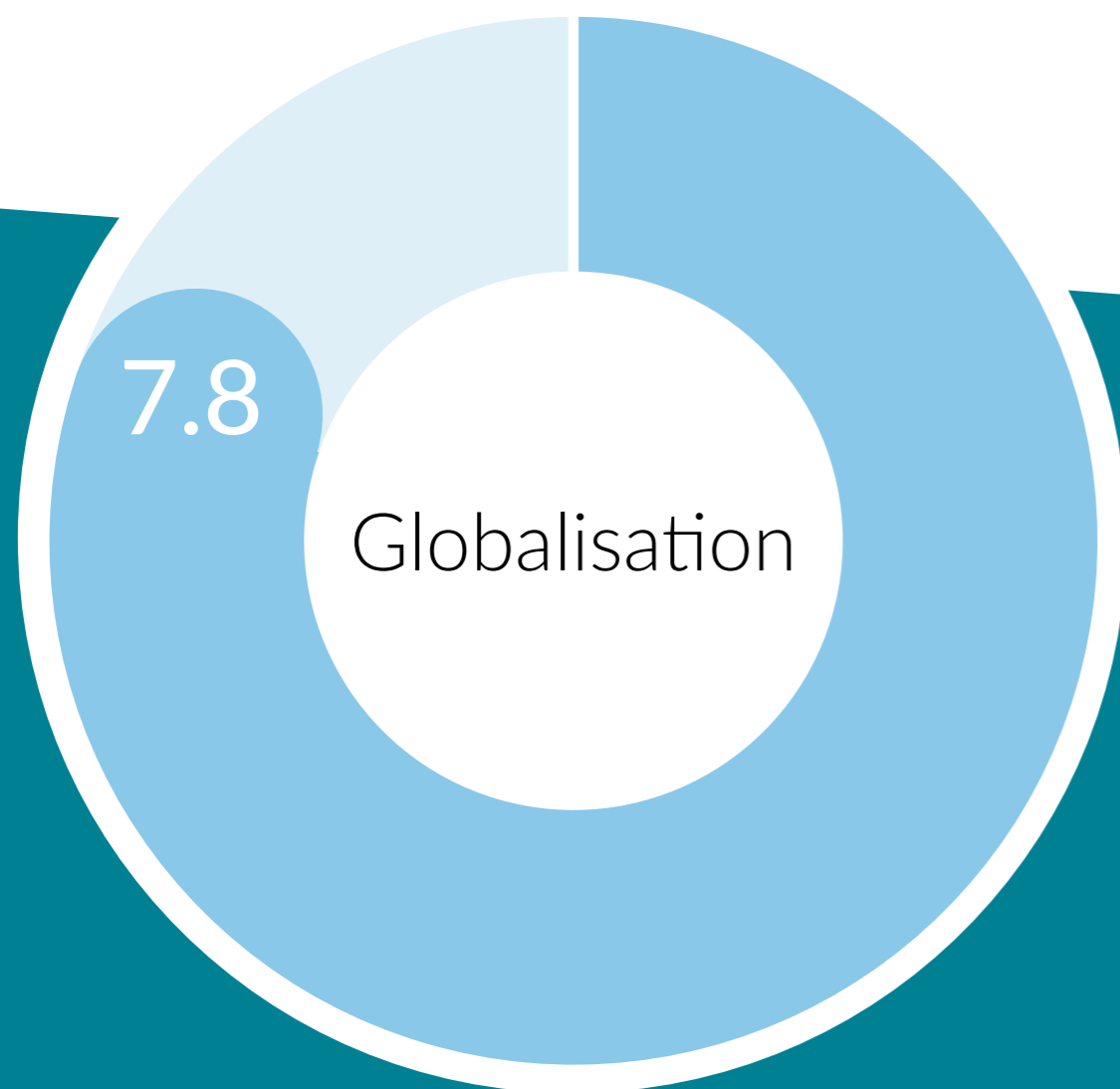


A 'GLOBALLOCAL' MINDSET

The term 'globalocal' is defined by Agilitas within this research as 'building local supply chains and ecosystems across global markets'. Taking this approach will have a significant impact on reducing carbon emissions around technology production, logistics and so on.

By its very nature, the Technology Channel is global at its core. Whether this be global teams operating across regions, international customer bases or dealing with the provision of hardware, traditional supply chains have been built across borders to ensure businesses have access to the right support and infrastructure.

In previous years, our study of globalisation has closely concentrated on how Technology Channel businesses 'are embracing new, global markets'. Last year presented a decline in confidence in this area from 7.8 in 2019 to 7.4 in 2021, a decrease that was linked to the impact of the global pandemic which slowed the pursuit of new territories for many businesses. However, optimism for global expansion has increased to 7.6 for 2022, showing that more companies are re-focusing on their opportunity for growth in new markets.



It is clear that a global approach will remain a permanent fixture for the Technology Channel in years to come. However, the increasing pressures on the manufacturing and production of technology hardware is adding a critical new dimension to how supply chains will evolve in the future. Another newly explored area in this year's Technology Channel Confidence Index is globalocal, which we have defined as building local supply chains and ecosystems across global markets to increase availability whilst reducing carbon emissions.

The last two years have created huge problems for technology vendors and suppliers in all corners of the world. The global microchip shortage has caused drastic delays in hardware production rates amidst growing demand, forcing many companies to look 'closer to home' to remain productive. Though there are now signs of light at the end of the tunnel, this lasting impact on businesses has created a huge case for reimagining the way supply chains are set up and operate throughout the global Technology Channel.

Now, expanding local supply chains is going to become a priority for businesses to help reduce dependence on the Far East. We are already seeing moves from large players like Intel, the world's largest semiconductor chip manufacturer. In early 2022, the company unveiled its plans to build a €17bn semiconductor site in Germany, "addressing the need for a more balanced and resilient supply chain". What's more, businesses are now being challenged to do more with less, investing in ways to reuse, rework and recycle hardware and devices to maximise the lifecycle of parts and contribute to more sustainable processes. As a result, we are seeing an emergence of globalocal supply chains whereby businesses create local ecosystems or hubs around the world and use them to operate faster and more effectively on a global scale.

In line with this shift, our findings show that many Technology Channel leaders are already recognising the need for globalocal supply chain innovation. When asked how important building local supply chains and ecosystems across global markets will be to their business in the next 12 months, respondents offered a mean score of 7.7 (where 10 was 'very important').



Of those surveyed, over half (59%) of channel leaders scored 8, 9 or 10, with Business Owners and Managing Directors citing a significant focus on a globalocal approach to their business model, with scores of 8.3 and 8.1 respectively. While the results display a high level response at the top of the scale, the remaining 41% represents a disparity in thought amongst leaders which may have any number of reasons.

Agilitas says:

It is true that 'globalocal' is a relatively new concept born from lessons learned in recent years, as a viable way to reduce logistics costs and carbon emissions, gain better knowledge and experience in local markets and minimise risk in an uncertain political landscape. This throws up some interesting questions around those showing less focus on local supply chains.

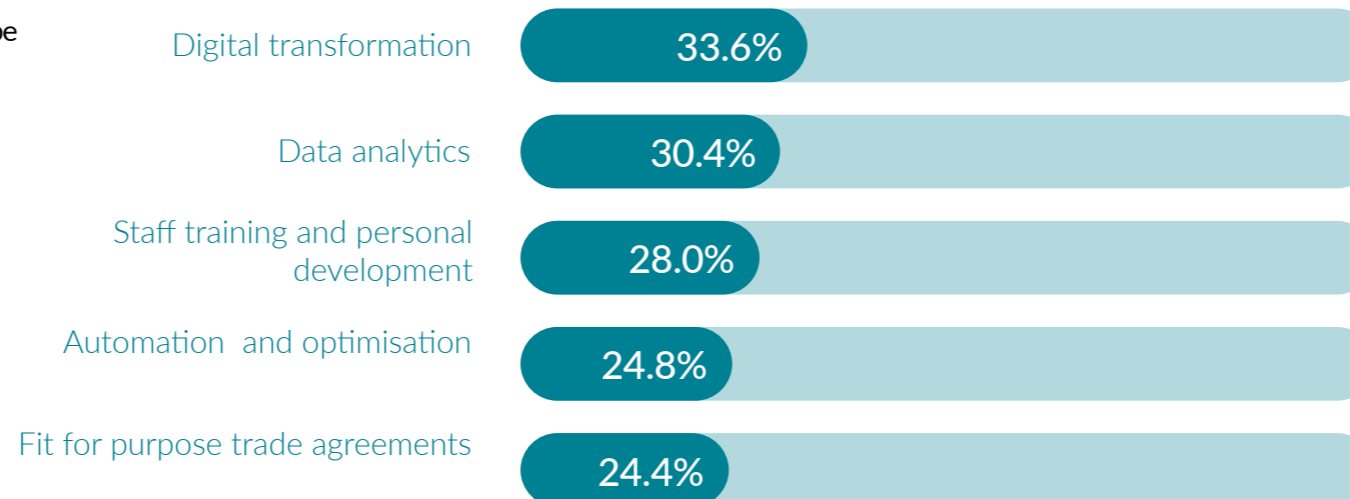
Perhaps the full impact of rising costs, Brexit and wider political events are not yet being felt to the full extent by some businesses, therefore the true value of the globalocal approach remains unclear. Alternatively, we can speculate that the 59% driving this shift in their own business are the ones looking to differentiate themselves from the pack, futureproof their model and focus on delivering their core services. For now, we are still in the early stages of the globalocal movement, and it will be very interesting to see how this picture evolves by the time of next year's Index.

A ROADMAP FOR CHANGE

While the vision for a globalocal future is already showing positive signs, such a monumental shift in processes can not be achieved overnight.

When asked about the time it will take to build successful globalocal supply chains and ecosystems across the Technology Channel, most respondents believe it will take between one and two years (32%). This was closely followed by a shorter period of more than 6 months, up to one year (28%), with 22% of respondents expecting a longer lead time of more than 2 years, up to 5 years. With so many moving parts to consider, Technology Channel firms can be commended for taking a careful and measured approach over time, in order to create sustainable change for the future.

With that said, channel leaders are already assessing the most important elements that will make building effective and successful globalocal supply chains possible. As with many modern businesses changes, navigating this adjustment will require a blend of the right technology, skills and regulation:



GLOBALLOCAL - THE AGILITAS VIEW

Yasmin Ripley, Logistics & Inventory Manager, Agilitas

The past few years have been incredibly challenging for anyone involved in logistics. We have all felt the impact of COVID-19 and Brexit. However, it now feels like the world is getting back to a degree of normality. It is inspiring to see the impact of our commitment to finding new ways to improve the global supply chain.

As a company with a large customer presence in Europe, Agilitas recognised the need for an EU hub very early on in the stages of Brexit. Whilst we as a nation and a company used to be able to send shipments from the UK into the EU the next day, the lack of control we had over customs clearance time meant we needed to be ahead of the game and have parts available in the EU, to eliminate the impact of Brexit on customers.

Opening the Agilitas Amsterdam hub was definitely the right decision. It has ensured our European customers didn't feel the impact of Brexit and we still achieved the highest possible service due to not exporting from the UK and facing custom clearance delays. I would recommend any Technology Channel company to have a hub in the EU to maintain productivity and output despite regulatory restrictions.

The global pandemic also affected all companies with staffing issues and we worked closely with trusted delivery partners to maintain the level of service we needed to navigate challenges. This experience emphasised the essential need to partner with the right companies in order to build the best supply chain; companies who have the same values and share the passion to provide outstanding customer service.



A PEOPLE-FIRST MENTALITY

Without people, there is no future and businesses have quickly learned just how integral a people-first culture is to achieving long-term growth. At the time of writing, the UK is facing the force of 'The Great Resignation', a term used to describe the highest rate of mass employee resignations across the region since 2009, according to official data. This movement has left many UK businesses with considerable challenges of both keeping staff and finding new talent in a competitive market where the level of open vacancies is the highest on record.

While the drivers may differ between individuals, organisations and circumstances, there are some overarching themes that can explain the shift in job seeking that first began in 2021. Perhaps more workers are now recognising their worth and with that, are seeking better employment opportunities that cater to the demands of modern life, such as greater flexibility and better pay to combat rising living costs. As we know, the hybrid working revolution has forced many companies to rethink their approach to team management and instil greater flexibility and trust to keep ahead of the shift.

At the same time, the next generation is also entering and disrupting the workforce. Many of which are technologically-savvy and self-taught in modern digital skills. Not only is this adding to the complexity of the recruitment market and in many ways, is putting the onus of organisations to create new roles that offer the right opportunities and allow room for growth and development.

With so many factors at play, the act of building a sustainable culture has never been more important in the race for attraction and retention.



The pros of flexible, hybrid working

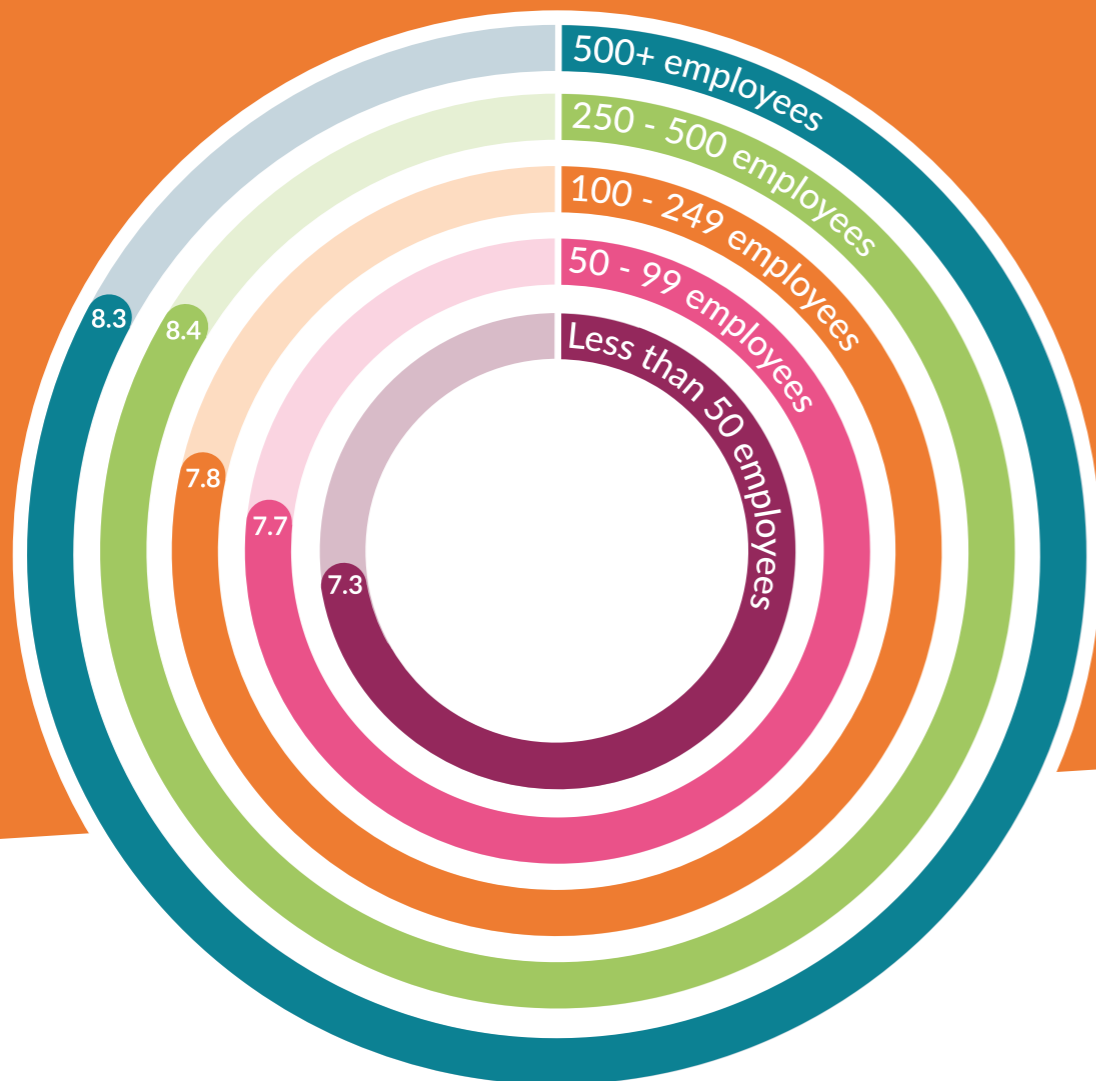
CREATING THE RIGHT CULTURE

Workplace culture across the Technology Channel is a new theme for this year's Technology Channel Confidence Index and was defined to respondents as 'building a culture that team members believe in and contributes to long term retention'. Creating a positive culture that works for every member of the business is no easy feat, nor is it a one size fits all approach. However, it is a fundamental need and our latest research revealed just how highly Technology Channel leaders are placing culture on their agenda.

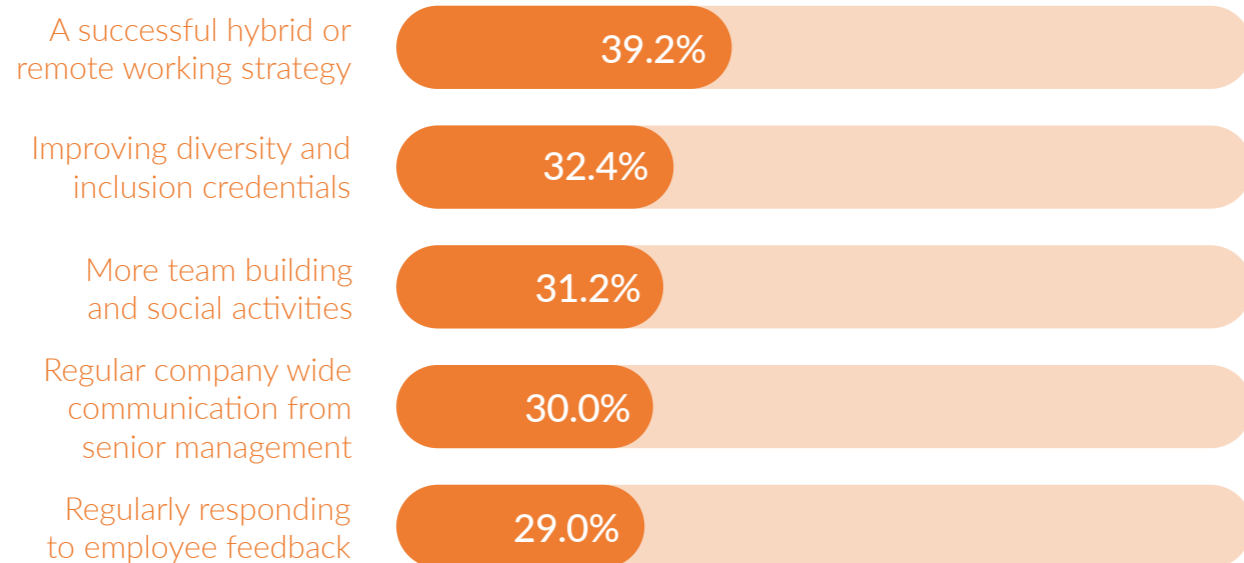
Following the same scale format, we asked respondents how important company culture is to the success of their business over the next 12 months. The results revealed an overwhelming response, with the mean score sitting at 8.2. Unpacking this further, a striking 70% rate its importance 8 and above, 23% of this number selected the maximum 10 ('very important').



The findings also unveiled an interesting dynamic between culture and company size. Of the groups surveyed, it seems as though the importance of culture grows as headcount increases. Technology Channel businesses with 250-500 employees rated highest at 8.4, whilst companies with over 500 employees scored 8.3. This decreased lower down the scale, with 100-249 employee-strong businesses marking cultural importance at 7.8, those with 50-99 employees scoring 7.7 and small businesses with 10-49 employees reaching 7.3.



As we know, the right company culture is built through action. We asked Technology Channel decision-makers to select the top three ways that they believe can most improve their company culture. When collated, the most popular five factors overall were:



Agilitas says:

Improving company culture is intrinsically linked to both attracting and retaining staff and those who take action to make change are the best placed to compete for talent in an era of mass resignations. The top factors revealed in this report represent the all-encompassing nature of a modern company culture.

The calls for remote and hybrid working needs have accelerated, but a successful culture is about much more than how and where people work. It requires clear learning and development paths, better social and professional communication, more active listening and the vital need for diversity, inclusion and equal opportunities. Looking ahead to the future, it is clear that Technology Channel businesses working to build a culture that all people can believe and participate in, will quickly outpace those who choose to stand still.



We know just how important company culture is to the Technology Channel and the processes that can be used to improve employee experiences, but how well will this be delivered over the next 12 months? To understand this, we asked leaders to rate their confidence in their own organisation's methods to support the people across their business. The results painted a very positive picture, with confidence in this area reaching a mean score of 7.9 out of 10 (where 10 was 'very confident').

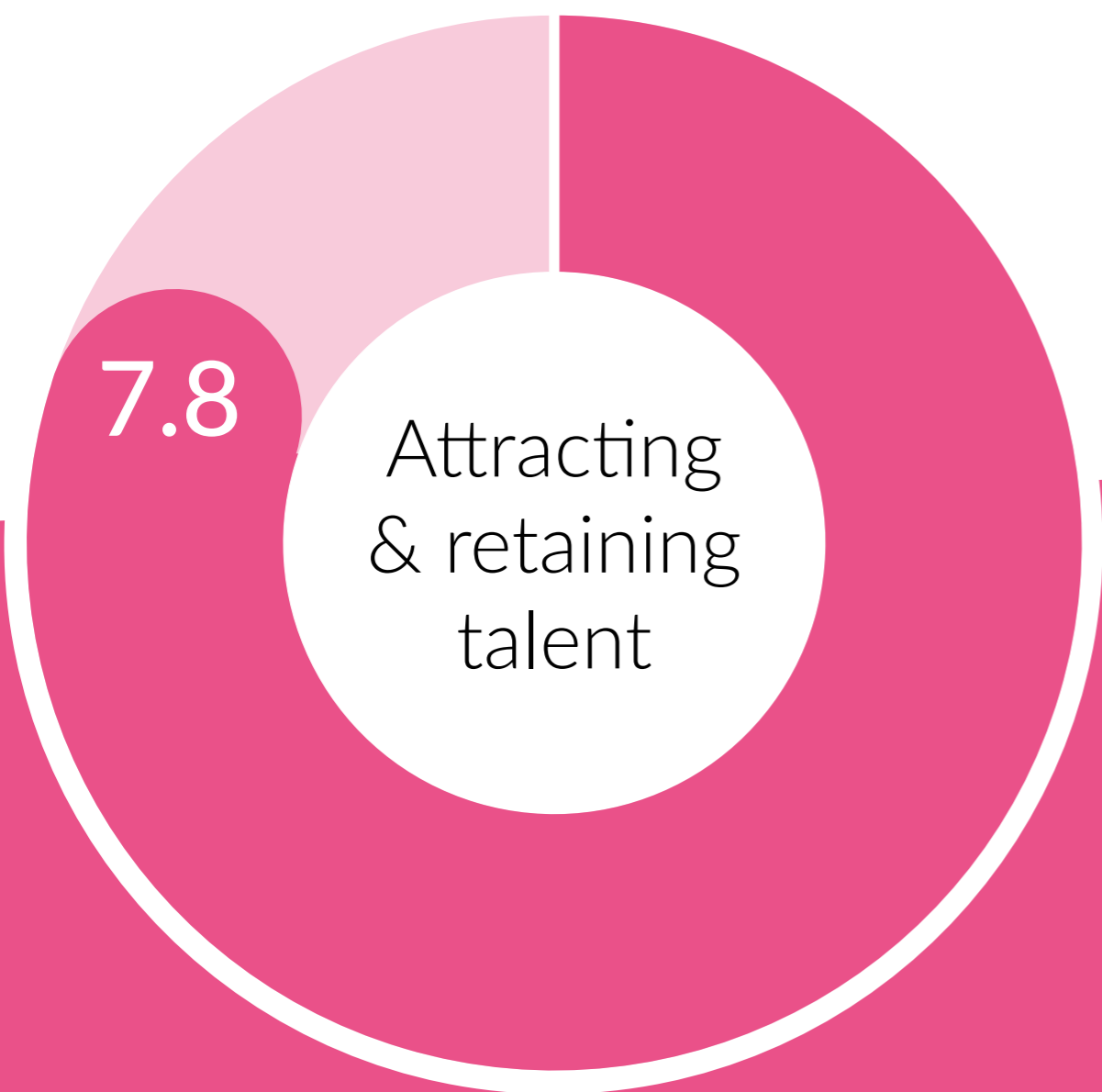
It seems that culture will be a huge area of investment for the Technology Channel and companies are either satisfied with their current culture strategies, or are planning even further improvements in the coming months to further improve support for their people.

TALENT ATTRACTION AND RETENTION

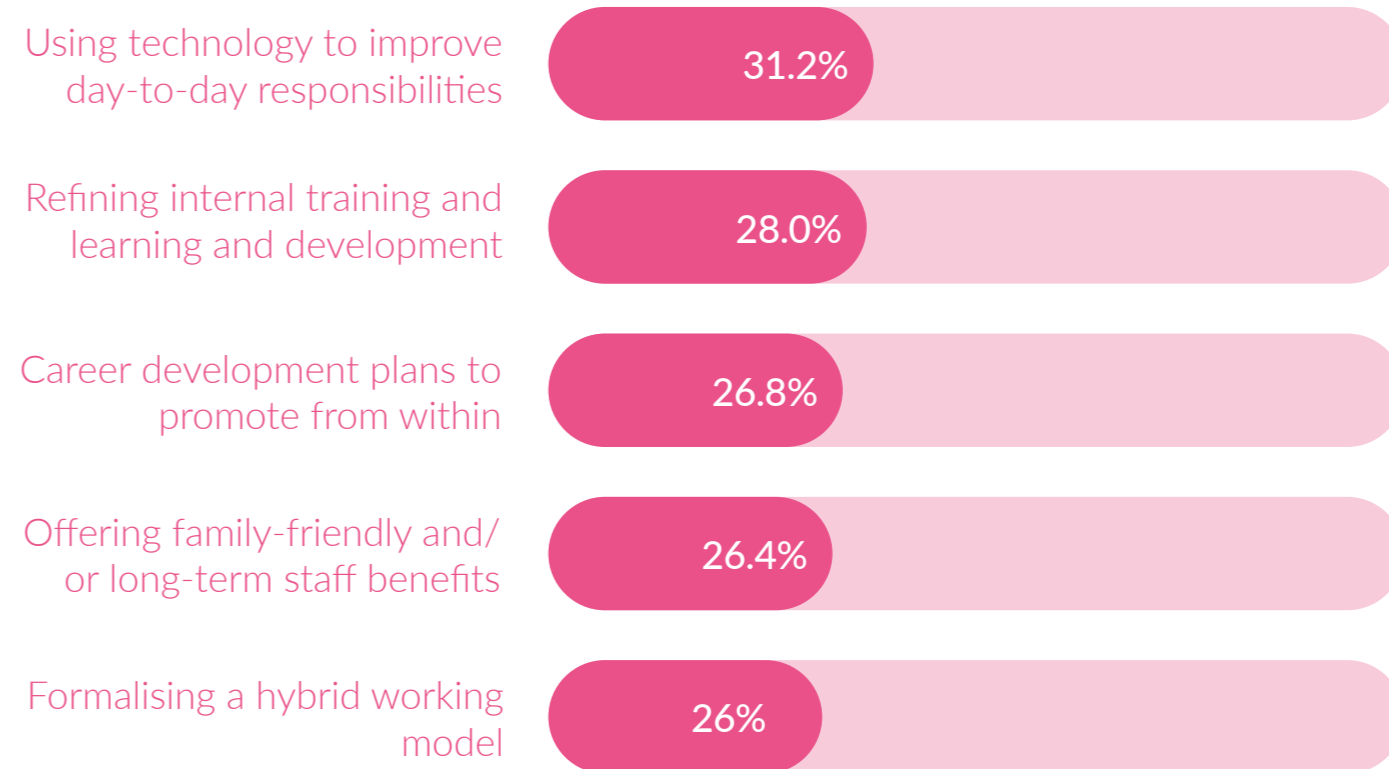
Recruitment policies have been a staple feature of this report since the barometer began. In line with our focus on people, we have expanded our analysis to not only explore attracting the right people, but also the critical need to retain staff within. To set the scene and provide a customary annual benchmark, we once again asked channel leaders to respond to the following statement, 'we are confident that we have the right recruitment policies in place to maximise our position'.

Positively, the response to this statement has returned to 7.6 this year, having decreased to 7.3 in 2021 from 7.6 in 2019. This increase may be a sign that many Technology Channel businesses have worked hard to evolve their recruitment strategies in line with their own transformation, to appeal to a wider talent pool capable of meeting customer needs and with new skills fulfilling emerging technology-based roles.

Looking at the sector as a whole, we asked respondents to share how confident they felt in the Technology Channel's ability to not only attract talent, but retain it in 2022. Contrary to The Great Resignation, Technology Channel leaders showed strong confidence in this area at 7.8 out of 10, with 64% scoring 8 or above on the scale.



Similarly to company culture, we also asked respondents to identify their top three factors that can most improve the attraction and retention of talent. Collectively, the top five areas were:



It seems that the most popular attraction and retention activities are closely aligned to building the right culture, with internal training, career development and hybrid working coming to the fore. The top factor of using technology to improve day-to-day responsibilities goes hand-in-hand with the shift we saw towards automation and efficiency earlier in this report, presenting even further justification for increased digital transformation across the Technology Channel today.

The Channel has high confidence in attracting and retaining talent

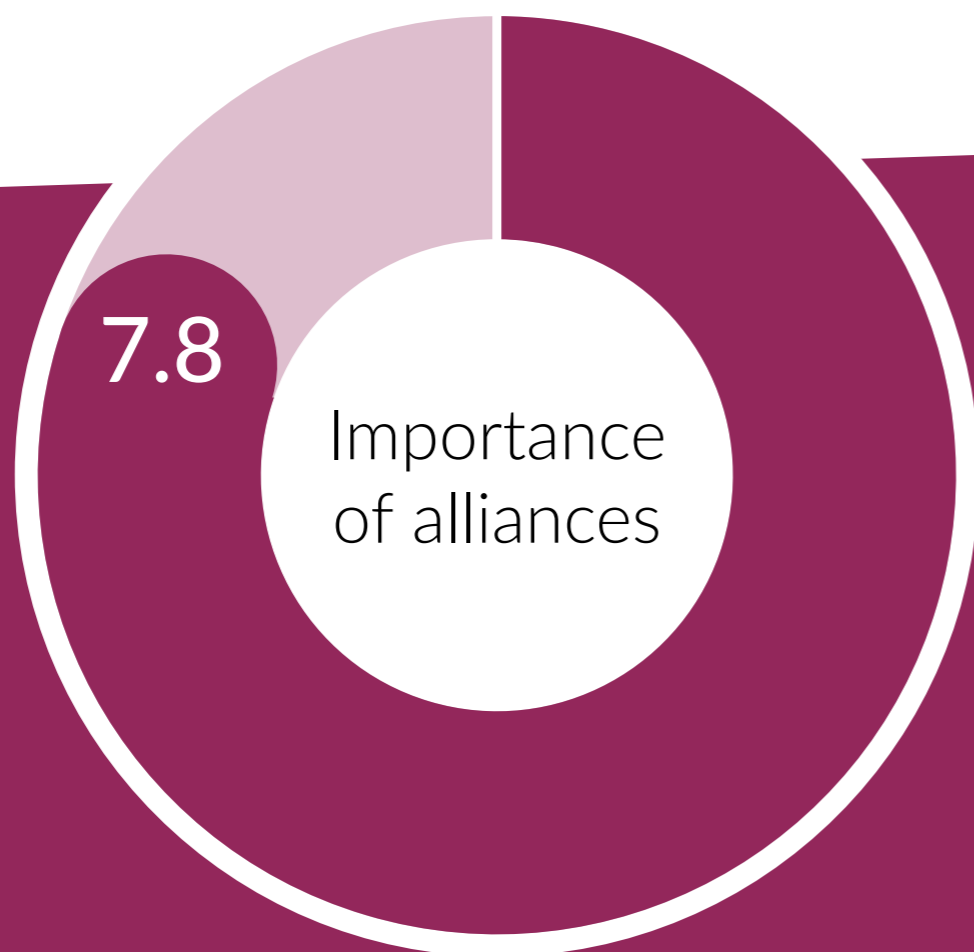
A COLLECTIVE MOVEMENT

The final section of the Channel Confidence Index 2022 explores the final of the three EVOLVE pillars; Partners. The Technology Channel has always been a best-in-class example of how businesses can work together to serve the needs of customers. As we look to build a more sustainable future, Technology businesses are fast learning that partnerships are simply no longer transactional exchanges of services alone.

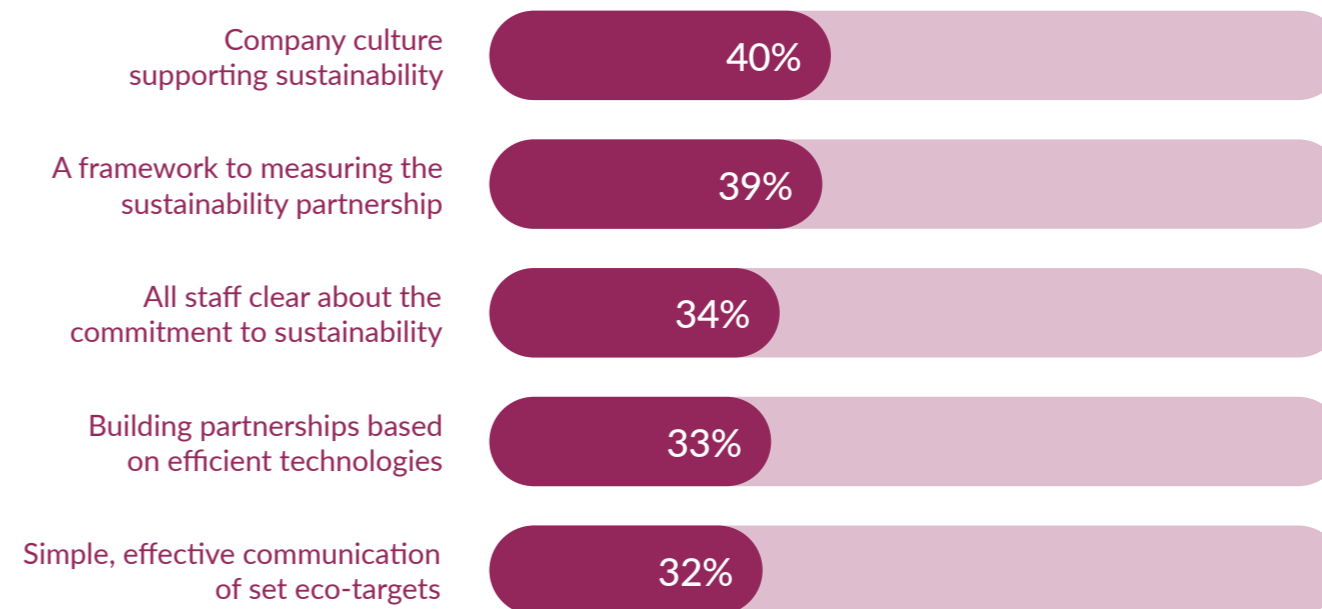
In fact, modern partnerships require a deep collaboration and sharing of ideas and initiatives to achieve sustainability goals faster. As a result, we are seeing a new type of 'eco-partnerships' emerge; where channel firms choose to collaborate with supply chain partners whose sustainability goals align with theirs and are willing to work together to achieve them.

The power of alliances has been explored throughout the previous Channel Confidence Index, but just as the role of the 'channel partner' evolves, so has our definition. This year, we describe alliances as 'building sustainable ecosystems by forming long-term and transparent relationships with like minded companies'. Respondents were asked how important this is to their business and presented a strong response, with a mean average of 7.8 (where 10 was 'very important').

However, importance levels varied by sector. Managed service providers (MSPs) deemed it most important at 8.1 whilst independent software providers ranked lowest in this area at 7.1. Here, we can draw some interesting conclusions. Many MSPs have grappled with challenges in the last few years and have undergone significant transformation to remain competitive, which may make long-term alliances all the more important to their future success. On the other hand, independent software providers may have less focus on long form partnerships due to their independent nature.



In addition to ranking its importance, we asked respondents to outline the top factors they believe Technology Channel businesses should look for to create sustainability-focused channel alliances:



These findings shine a light on the role that company culture plays when forming sustainable partnerships. If all employees are able to participate in their company's own vision and are bought into the commitment and targets, this will make for more valuable and impactful collaboration across the board.



Build transparent relationships with like-minded businesses

INDUSTRY VOICE: HIGHGATE SOLUTIONS

Jenny Latimer, Alliances and Marketing Manager

When we meet with a new partner, we always introduce Highgate's sustainability strategy and aim to find out more about theirs. It is extremely positive when partners have this information readily available and can provide a document or direct us to a dedicated webpage.

The Channel's priority order is very similar to our approach. However, our actions have been driven around our current focus areas, which have organically enabled us to achieve all five of the top factors. These focus areas include measuring our carbon footprint, forming strategic partnerships with organisations that have similar sustainability goals and raising internal and external awareness. There are many steps organisations can take to be more sustainable and it can be overwhelming to know where to begin. Honing in on a couple of areas first can simplify this to help organisations to navigate their efforts.

We are always measuring our carbon footprint and have processes in place to capture travel emissions as they happen. This gives us the ability to adapt and change throughout the year as necessary. Our four day week trial has reduced our energy emissions by 20% and during the extra time off, employees are able to make more sustainable choices, like walking or cycling instead of driving. We also encourage our teams to live more sustainably, by providing them with items like litter pickers, wildflower seeds and environmental fact sheets.

Externally, we are committed to working with partners on initiatives to maximise impact, and are offering customers services that keep old equipment from going to landfill and promoting technologies that have the least environmental impact.



MEASURING PURPOSE AND PROFIT

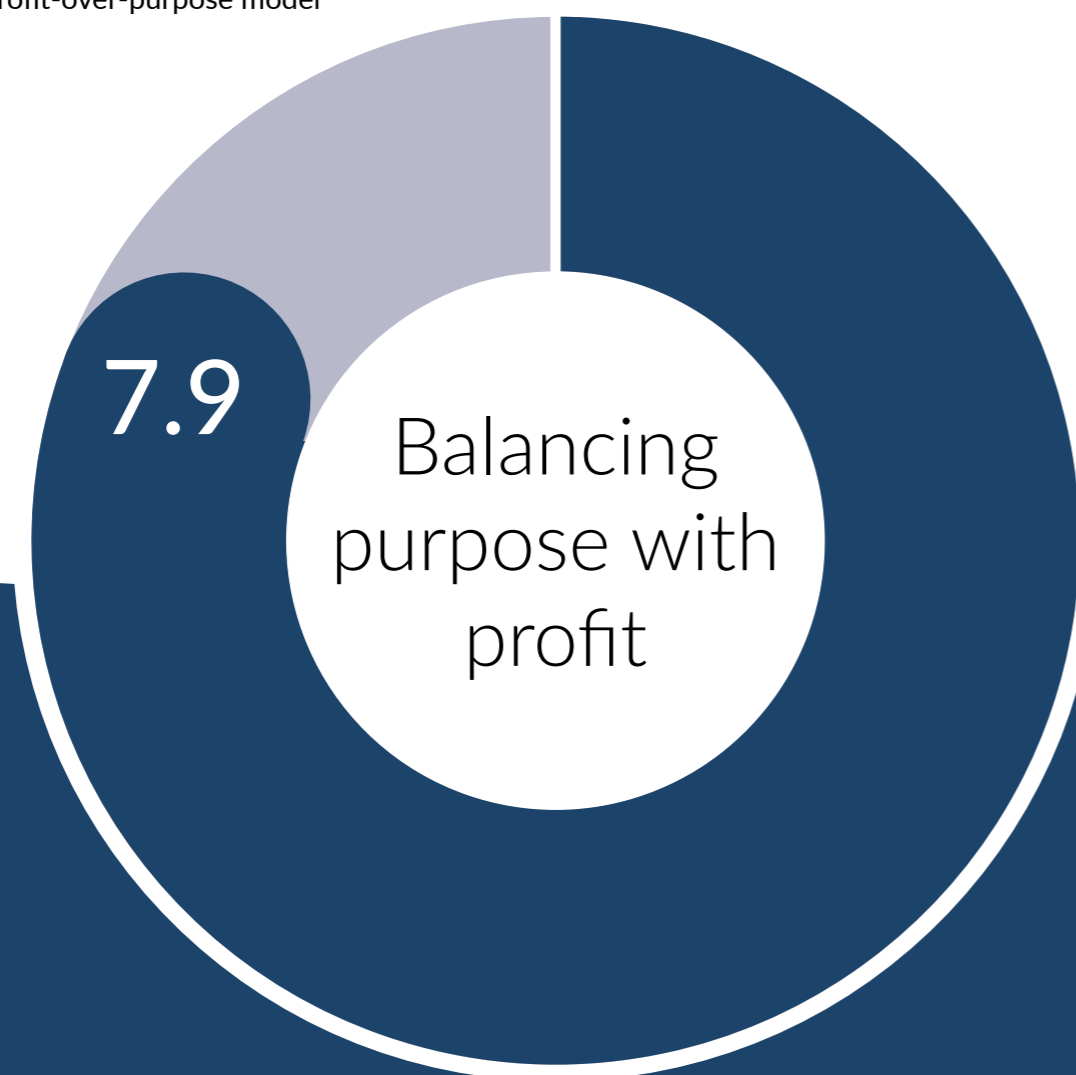
Within this report, we have looked closely at the many ways that Technology Channel leaders are taking action to build a future of prosperity, positive culture and environmental sustainability.

While these actions are the fundamental force of change, there also has to be a parallel shift in how these businesses evaluate the success of the relationships they form. Now, Technology Channel businesses must look beyond financial gain and broadening their definition of value, to include environmental and social responsibilities that will contribute to a healthier and more sustainable future.

Senior Channel decision makers were asked how, if at all, their business prioritises the importance of purpose (environmental and social) and profit when evaluating partnerships. The findings revealed that many Technology Channel businesses are already shifting their mindset, with almost half (46%) stating they measure purpose and profit in equal measure. Of those remaining, more companies (18%) are prioritising environmental and social purpose over profit when it comes to their partnerships, than those opting for a traditional profit-over-purpose model (12%).

This is a very positive step in the right direction and it's clear that many Technology Channel businesses are recognising the need for change. A further 10% confirmed that their business is currently re-evaluating its approach to partner collaboration, setting the scene for a more purposeful future.

Aligned with this outlook, confidence in the channel's ability to form collaborative partnerships that balance profit with purpose was high amongst channel leaders, with a barometer reading of 7.9 out of 10. It will be very interesting to see just how many businesses move to a purpose-driven partner procurement process over the course of the next year.

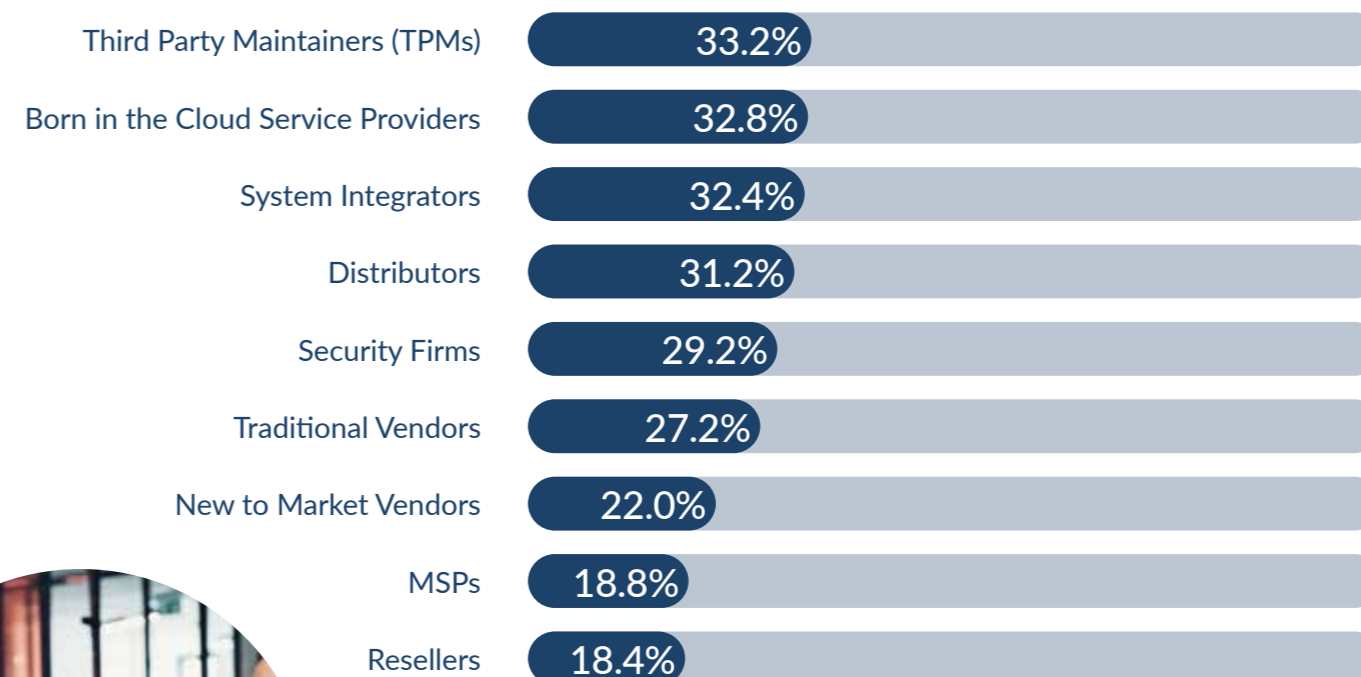


WHO ARE THE CHANNEL CHANGE-MAKERS?

As those within the Technology Channel will know, successful long-term partnerships are fundamentally built on trust, honesty and transparency. Through an alignment of common goals and understanding, businesses can work better together to pave a future of sustainable growth. When asked how important forming long-term relationships built on honesty and transparency will be to their business over the next 12 months, 61% of respondents scored 8 or above, where 10 was 'very important'.

This is perhaps another fallout of the pandemic era. During this time, many Technology Channel firms not only strengthened their partner relationships and worked together to overcome challenges, but found new ways to collaborate and support each other, beyond traditional SLAs. However, as we look to the future, this year's survey identified the frontrunners in the movement towards building long-term partnerships.

Respondents were asked which Technology Channel businesses they believed are the most likely to lead the way in forming trusted long-term relationships in the next 12 months:

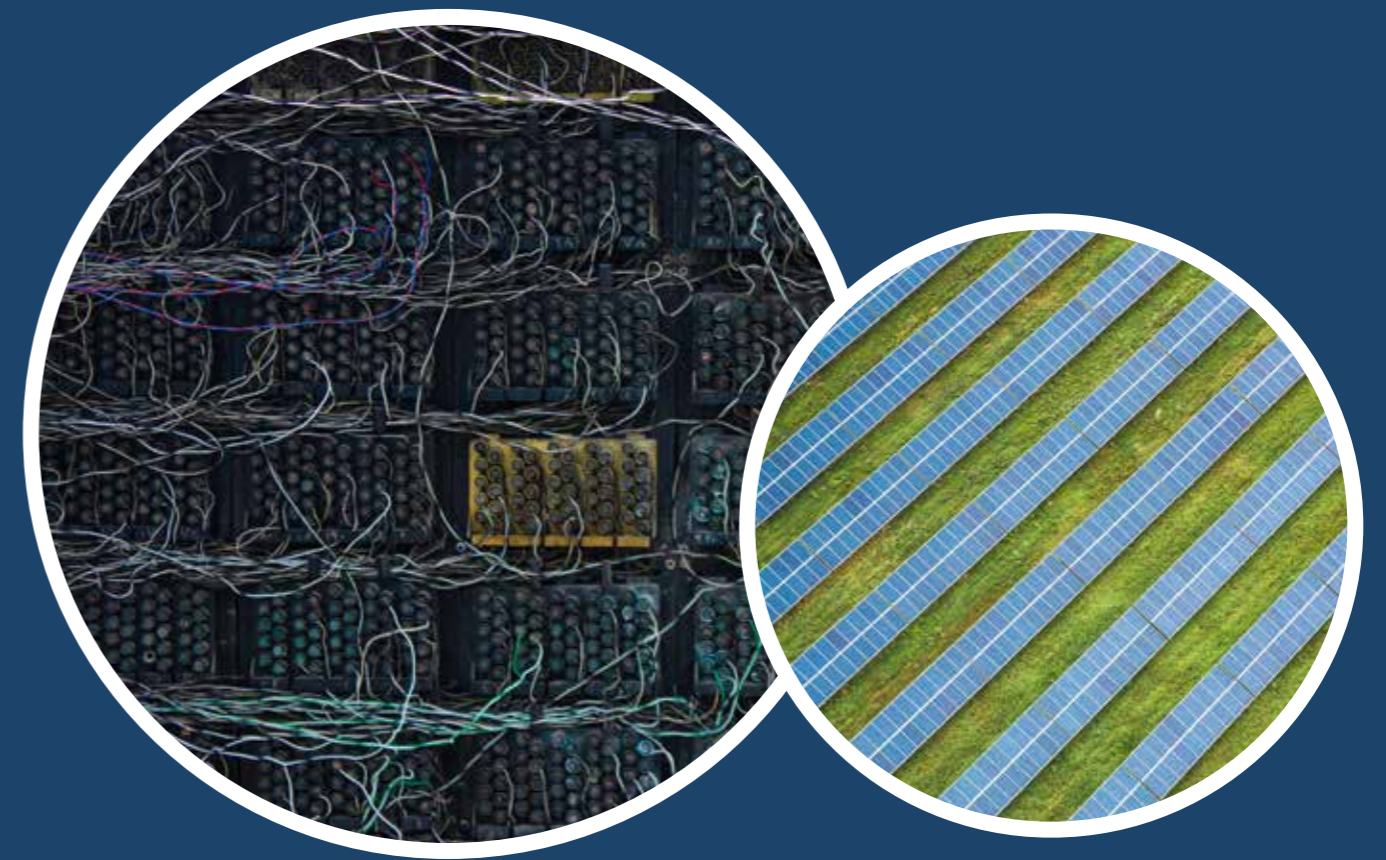


Channel businesses are recognising the need for change

Agilitas says:

As service-related businesses, the top 3 business types have the ability to integrate quickly and seamlessly with partners and provide crucial value-add services to the end user. The flexibility afforded by their business model delivers a high degree of agility, allowing them to evolve their core offering to meet customer need in years to come. They also understand how annuity and subscription/on-demand models deliver greater margins. In turn, this creates cash for future investment in talent and infrastructure, enabling them to stay ahead of other firms.

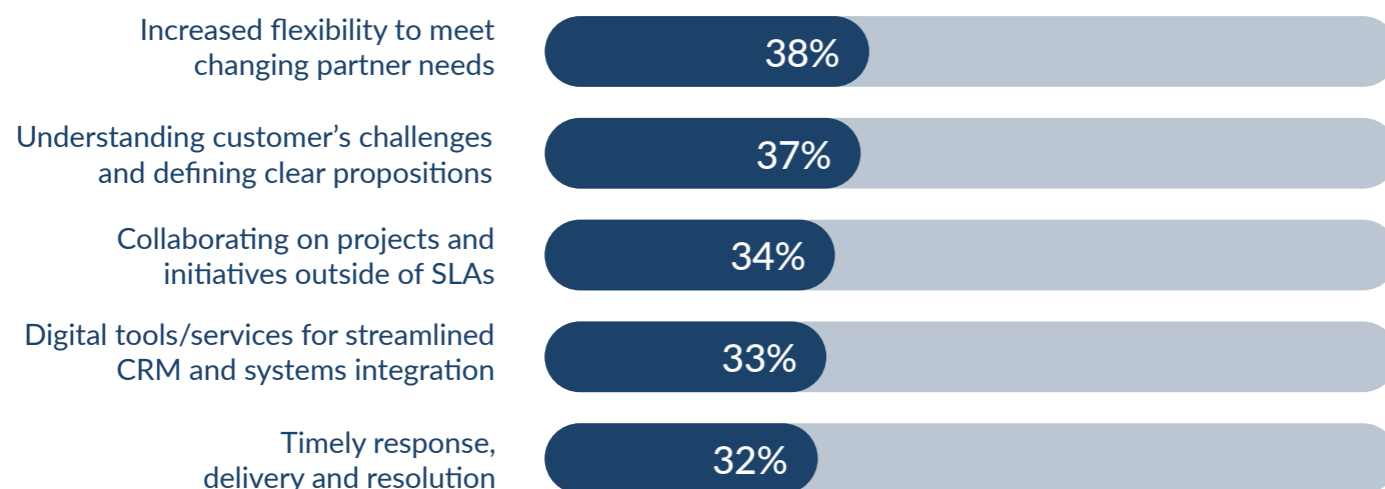
Known for short-term transactional relationships that are led by product sales, it's unsurprising that resellers fall at the bottom of this list, with MSPs, many who were providing very reactive and simple monitoring service pre-COVID, close behind. But as VARs add their own IP to differentiate and MSPs find their new relevance to meet new customer requirements such as managing tech lifecycles and security threats, we anticipate that this perception of business relationships will evolve dramatically over the next 12 months. VARs and MSPs that prove their value to customers will inevitably form long-term partnerships along the way.



maintel 
THE ART OF REINVENTION

TAKING ACTION

Regardless of business type, there are some key steps that businesses can take to achieve lasting, honest and transparent relationships. When asked what measures their business is taking, the top five responses amongst Technology Channel leaders were:



We have seen huge strides being made by Technology Channel businesses to reinvent traditional models, forming strategic alliances to overcome the challenges of legacy processes at scale in a more technologically advanced ecosystem. One such business is Maintel, a trusted provider of Cloud & Managed Communication services.

Maintel collaborated with Agilitas to provide a flexible, automated and well-integrated inventory management service that will enable the company to grow and enhance the speed of delivery at scale in-line with their ambitious growth plans. The partnership sees Maintel utilising Agilitas' advanced Inventory-as-a-Service solution, InventoryAssure+. The all-inclusive service provides engineering resources coupled with the provision of multi-vendor tech spares to its support customers, as well as the nationwide storage and distribution of all project stock.

Agilitas' suite of flexible inventory support options offers comprehensive service levels that ensure maximum 'uptime' regardless of technology or geographical location. This resulted in an outsource of its entire hardware infrastructure of over 65,000 technology devices, enabled by Agilitas designing a solution to deliver the service to Maintel in a scalable operating and commercial model. Agilitas' as-a-service model meant that its services were able to be flexed to meet Maintel's exact requirements both at an operational and a commercial level.

As the partnership evolves, Maintel is seeing early signs of strong progression and success. Transferring inventory management and stock ownership to Agilitas and the responsibility to manage the contract for an initial five years has provided Maintel with an SLA-based service that it can rely on. The team is now benefitting from a clear link between transition and stock, which is ensuring it can support all customers from day one.

CLOSING REMARKS

As the first Agilitas market report of the post-pandemic era, there is no surprise that the first EVOLVE Technology Channel Confidence Index would offer up such a diverse mix of results, full of lessons learned, progression and disruption. There are huge positives to be drawn from the overall increase in confidence about the future of the Technology Channel. However, it is clear that there is work to be done to ensure businesses deliver successful environmental, social and corporate governance strategies.

This year cast a deeper light on the state of sustainability across the Technology Channel and the commitments that firms are taking to building partnerships, ecosystems and supply chains that contribute to a sustainable future. Digital transformation and automation as a trajectory is a huge contributor to a more productive workforce, more efficient ways of working and better sustainability.

In the months ahead, we will no doubt see a movement amongst Technology Channel businesses to redefine their purpose and how they want to be valued, ushering in a new era of eco-focused channel partnerships built on shared views for improved sustainability. The vision to act with impact extends to all corners of the Technology Channel to build an environmentally, socially and economically sustainable future. Now, the true value of success is no longer determined by financial gain alone, as many channel players seek to reevaluate the way they do business to find the right balance between profits and purpose.

At a time where UK job vacancies have risen to record levels and unemployment fell to its lowest rate in nearly half a century, the buoyancy of the recruitment marketplace must be a crucial consideration for any business. However, it is positive to see the importance that Technology Channel firms are placing on creating a supportive

company culture that everyone believes in and contributes to, in order to attract and retain new talent in a competitive marketplace.

As regulatory, political and trade factors continue to bear down on the Technology Channel's ability to flourish, the global local revolution will certainly come into its own in the months ahead. In this point of transition, there is a call for leaders to be brave in their decision making in order to stay ahead of the curve and differentiate their businesses. Regardless of the approach or direction taken, Technology firms have a responsibility to the planet, their people and partners to remain accountable for their actions and reevaluate their approach to channel partnerships in order to bring about impactful change, faster. Above all else, a brighter future will be built on greater honesty, transparency and idea-sharing between partners.



Find the right balance between profits and purpose

LOOKING FORWARD

While the EVOLVE era may look and feel slightly different, our focus on providing actionable market insight remains the same. Over the coming months, you can expect a series of reports which continue to map the course of progress across the Technology Channel.

The topics explored within this Confidence Index will form the foundation of our future market research, to continue providing a clear benchmark for change across the ecosystem. Upcoming reports will explore these themes within the context of our three core pillars, Planet, People and Partners, which will continue to evolve as new trends, challenges and opportunities arise.

Stay tuned in to our website and social media channels, following the #ChannelConfidenceIndex hashtag for further news, views and insights from across the UK Technology Channel!

In order to create industry discussion around the issues impacting the Technology Channel both today and tomorrow, we will be releasing our future findings in a number of exciting ways, through videos, events, media outlets and much more. We will also be inviting more industry leaders to join the conversation and share their reactions to the trends and initiatives that are paving the way for a more sustainable future.



#ChannelConfidenceIndex



PLANET



PEOPLE



PARTNERS



EVOLVE

THE CHANGING CHANNEL

#EvolveWithAgilitas



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