

State of the Channel 2025

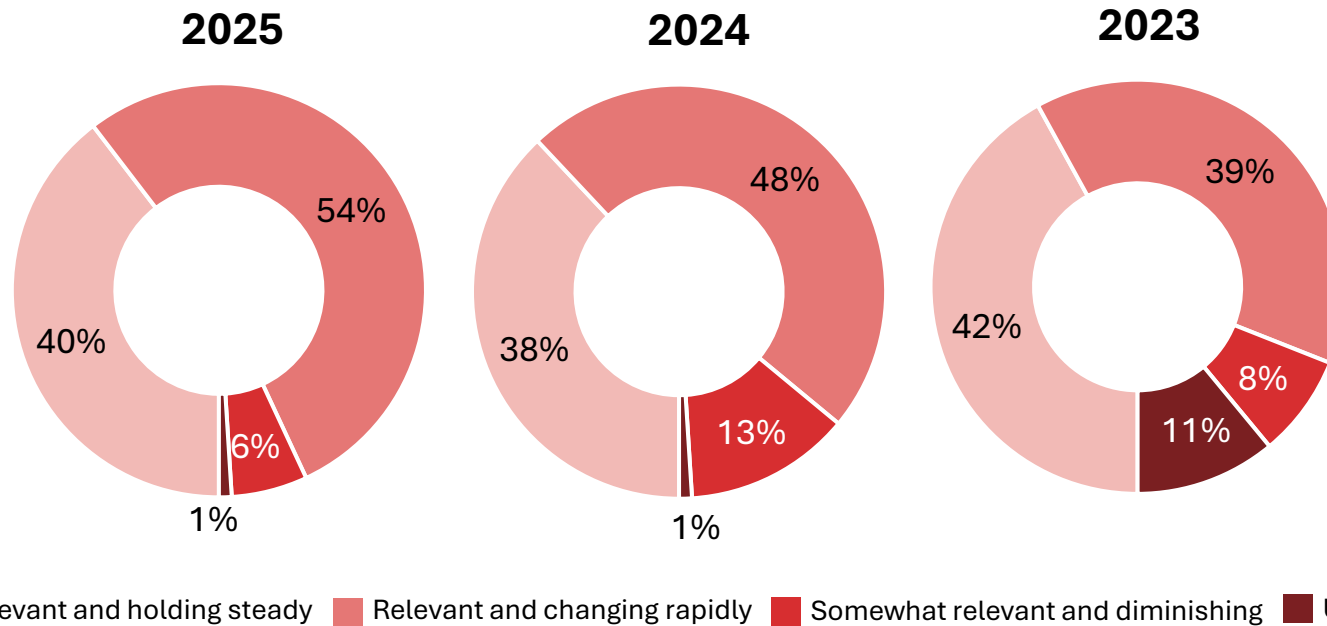
Benelux



Global Technology Industry Association

Most Channel Firms Report Optimism About the Year Ahead – But With Caveats

Assessment of State of Channel Health and Relevance



Notably for the channel, the largest bucket of spending for the last two years has been on IT services. Gartner says worldwide spending on IT services will reach \$1.73T this year, up from \$1.59T in 2024. This represents a 9% spending increase year over year. Robust IT services spend is a harbinger of opportunity for the channel, where customers turn for expertise.

The channel's prevailing outlook for the year ahead tends to be positive. For example, 54% described the channel as "healthy and changing rapidly," a 6% increase over last year. This group is embracing growth and emerging techs like AI. Another 40% characterized the channel as "relevant and holding steady," indicating stability without explosive growth. Takeaway? Benelux's channel is more bullish about 2025 prospects and growth than last year.

Status of Channel's Business Goals

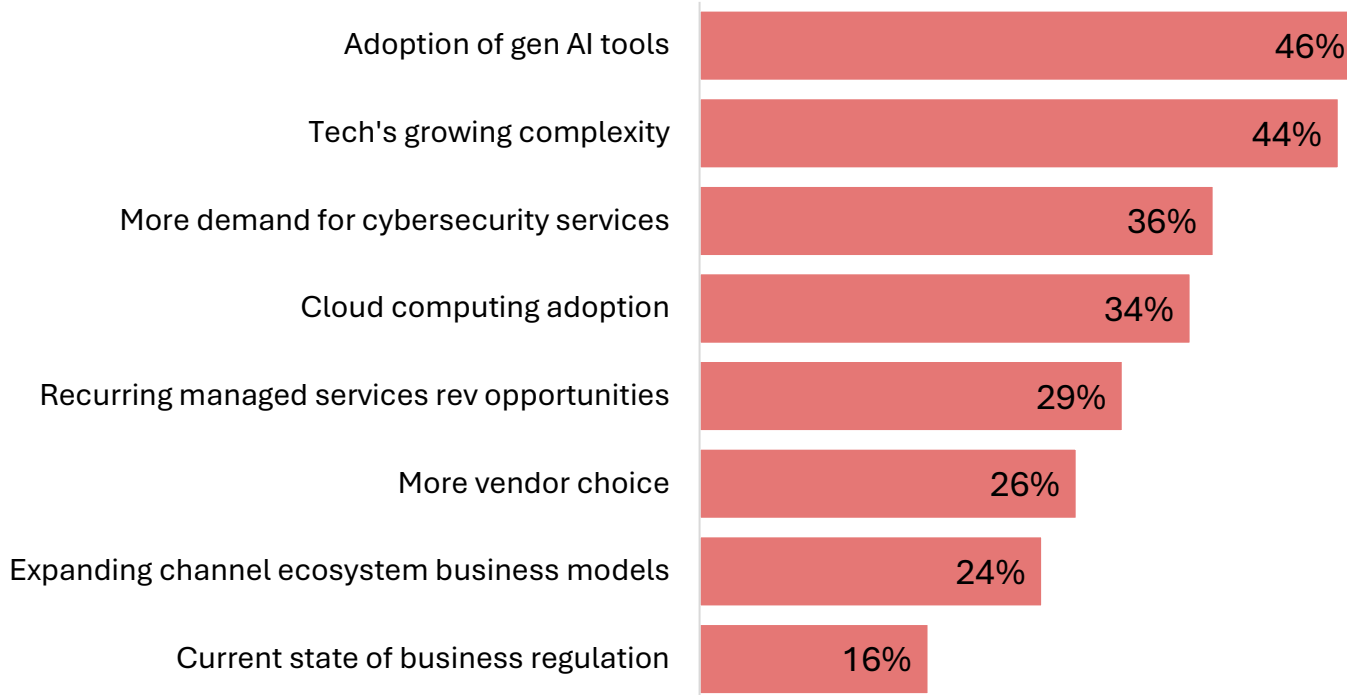
14% Ahead of expectations
73% On target
10% Lagging slightly

Source: GTIA State of the Channel 2025 Benelux survey | n=126
GTIA State of the Channel 2024 Benelux survey | n=129
GTIA State of the Channel 2023 Benelux survey | n=118

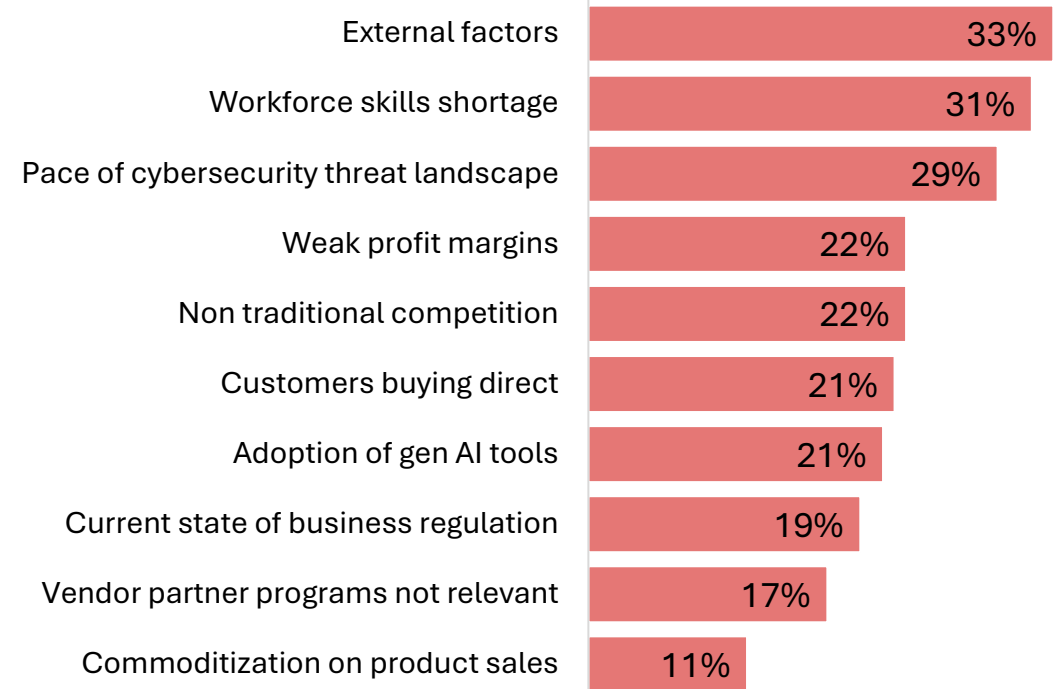


What Channel Firms Say Will Drive or Hinder Business This Year

Factors Contributing to Healthy IT Channel



Factors Inhibiting a Healthy IT Channel

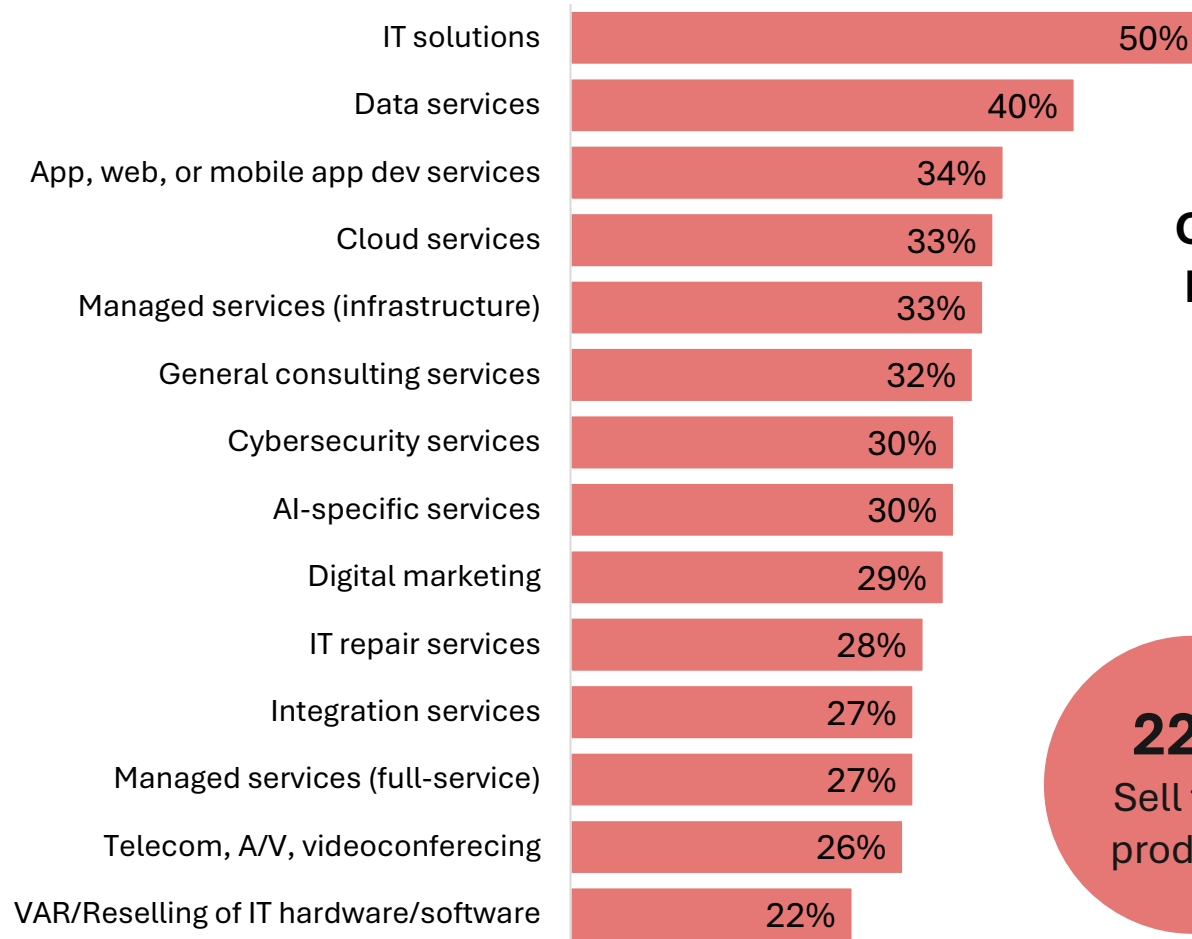


Benelux's channel firms are banking on the adoption of AI tools to help drive their fortunes in the years ahead. That belief pairs well with their view that technology's increased complexity will also be a boon for business. Indeed, customers today are looking for channel expertise to help with everything from developing an AI strategy to ensuring their data is safe to applying technology to broader business goals.



Revenue and Profitability: Where the Channel Sees Growth/Opportunity

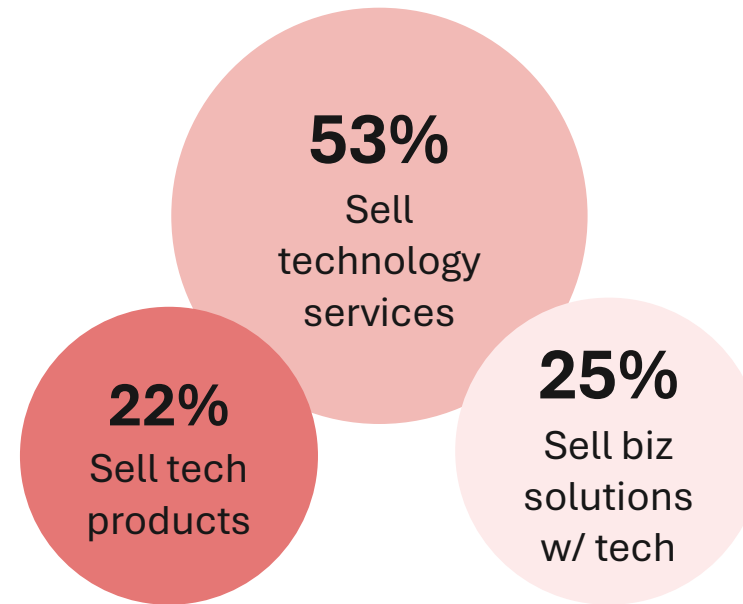
Main Portfolio Composition for Today's Channel



Top Revenue Projections

1. Cybersecurity services
2. AI services
3. Data services
4. Digital marketing

Channel Firms Describe Primary Business



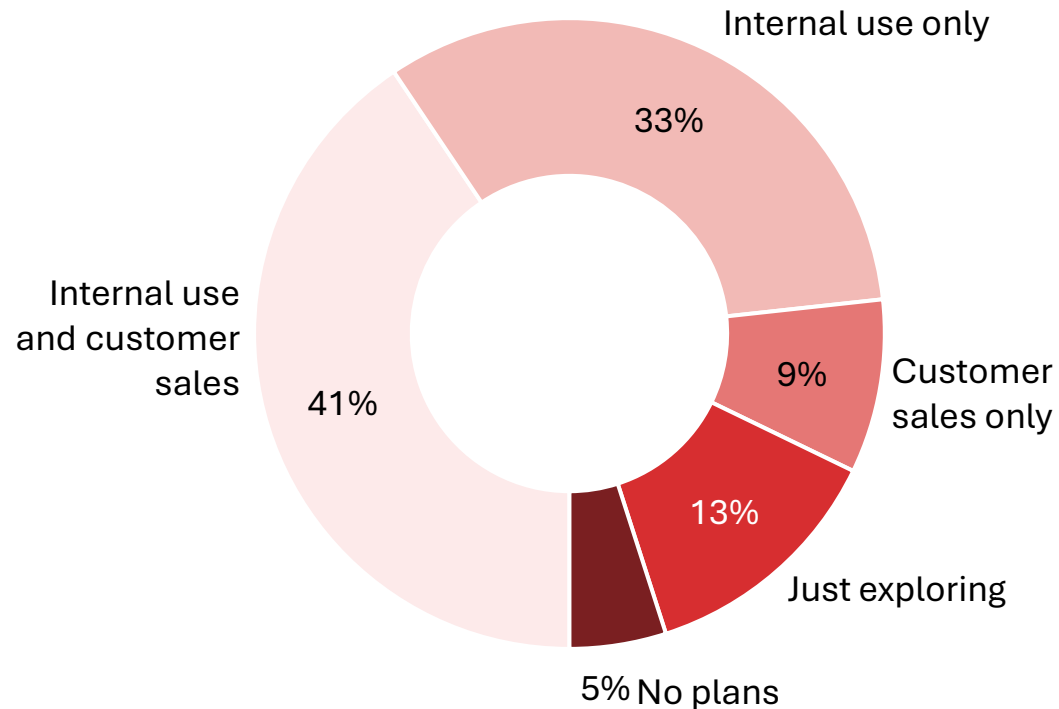
Top Profit Projections

1. AI services
2. Integration services
3. Digital marketing
4. Cybersecurity services

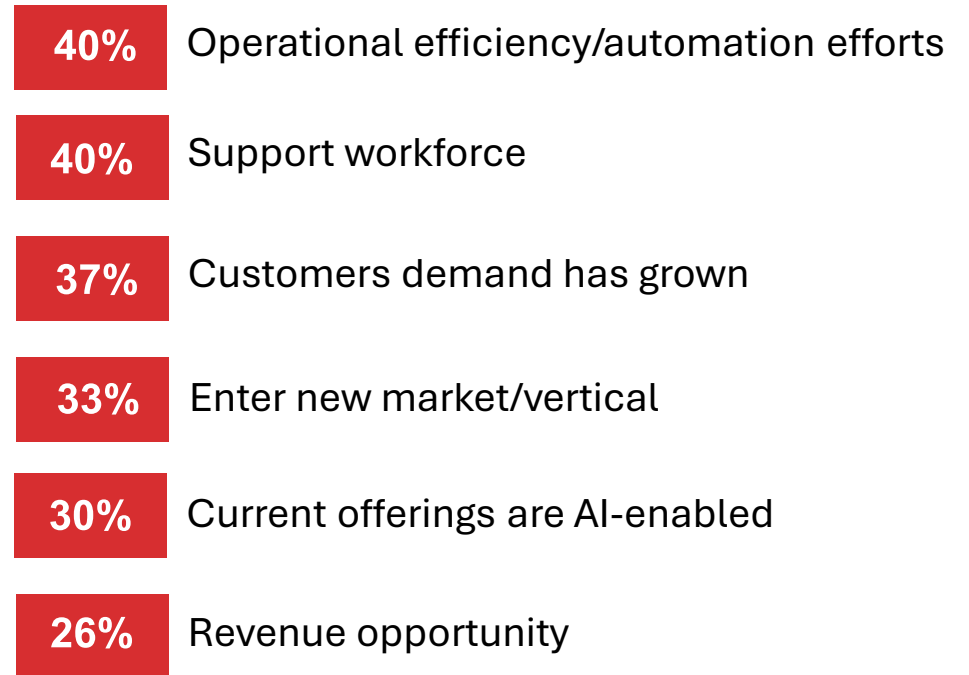


Artificial Intelligence Gains Ground as an Efficiency Driver for Channel

Company Plans Over Next 12 Months



Motivations for AI Adoption Lean Toward Internal Needs

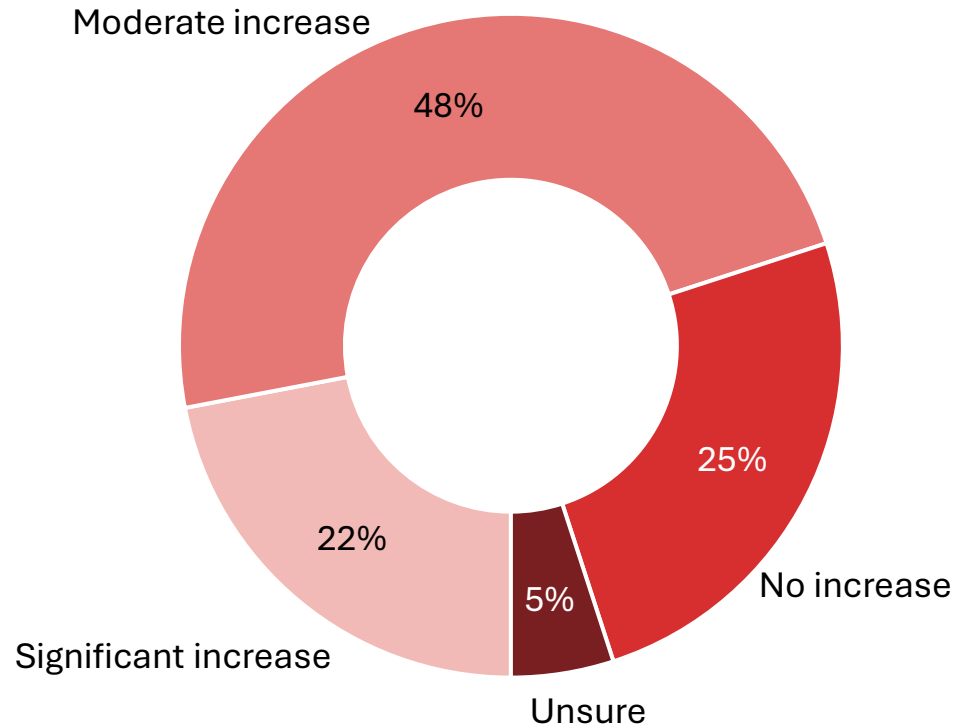


Benelux's channel is using AI today mainly in content generation activities (42% of respondents) and automation of internal functions (36%). But the next two most popular uses on the list reflect AI in a revenue-generating role as part of the product portfolio and, specifically, as a data services offering.

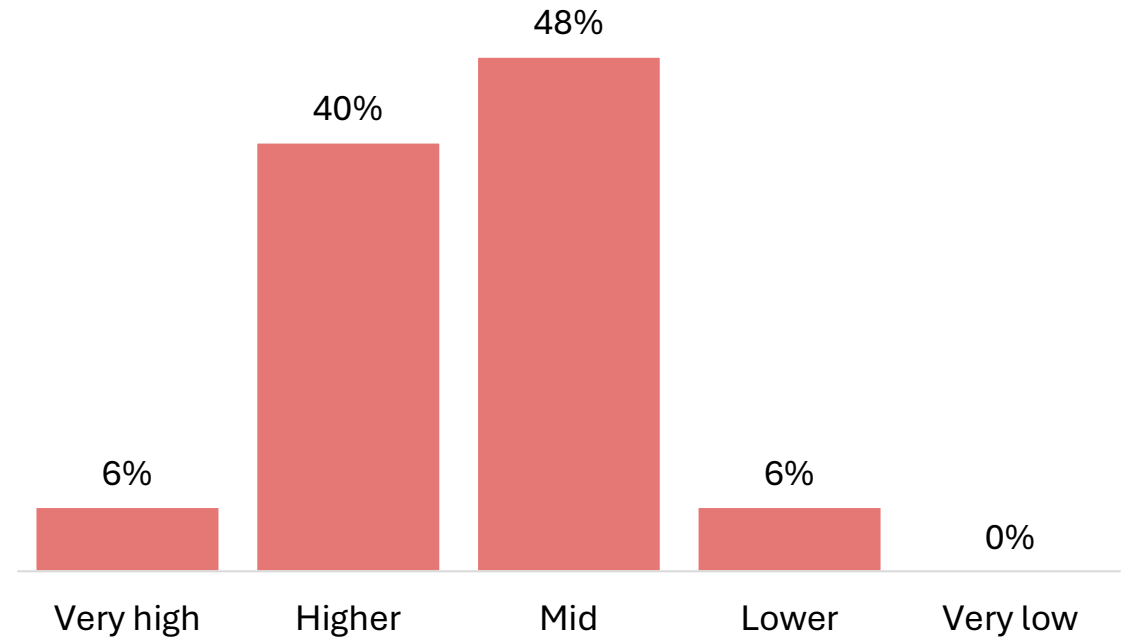


Changing Skills Requirements Keep Workforce Issues Front & Center

Tech Hiring Expectations



Level of Change in Skills Requirements is High Across Cybersecurity, Data, AI

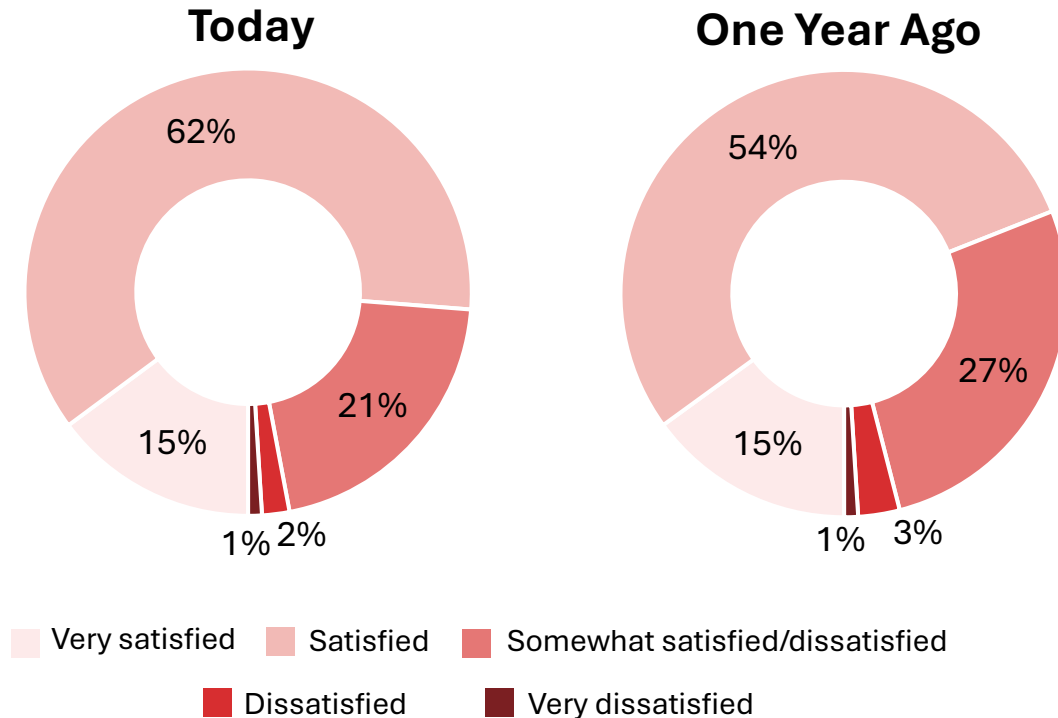


31% of Benelux channel firms said workforce skills gap issues is the No. 2 potential inhibitor to a successful year ahead. Companies are mainly addressing the gap through hiring for newly created and existing positions that now require different skills.

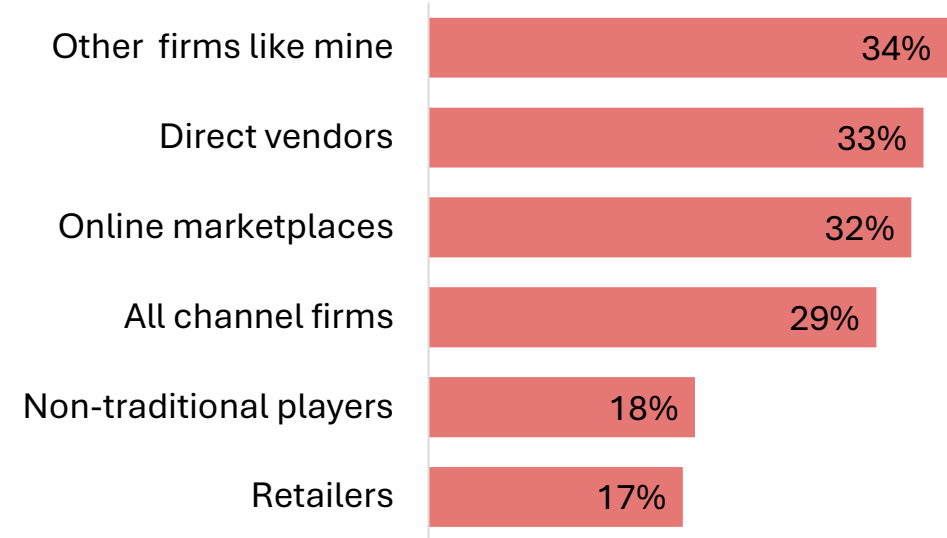


Vendor Sat Remains Steady Despite Continued Issues with Sales Conflict

Channel Assessment of Vendor Relationships



Main Competitors Cited Today



Top Reasons for Changing Vendors

- 29% Seeking to enter new markets
- 28% Looking for better profitability
- 21% Selling more of our own IP



Methodology

GTIA's *State of the Channel 2025* study provides insights around key channel trends in business environments.

The quantitative study within the Benelux region consisted of an online survey fielded to channel professionals during December 2024. A total of 126 respondents participated in the survey, yielding an overall margin of sampling error at 95% confidence of +/- 8.5 percentage points. Sampling error is larger for subgroups of the data.

As with any survey, sampling error is only one source of possible error. While non-sampling error cannot be accurately calculated, precautionary steps were taken in all phases of the survey design, collection and processing of the data to minimize its influence.

GTIA is responsible for all content and analysis. Any questions regarding the study should be directed to GTIA Research and Market Intelligence staff at research@gtia.org.

GTIA adheres to internationally respected and accepted code of standards and ethics for market research.



Source: GTIA State of the Channel 2025