



Direction of Technology

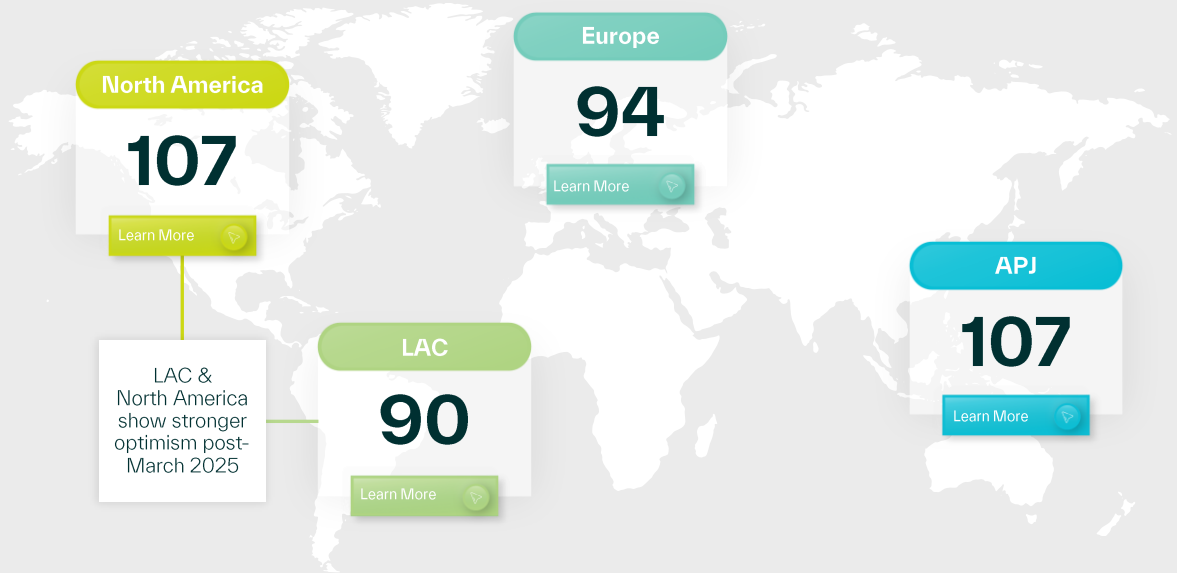
Asia Pacific and Japan Nuances:
The Opportunity to Scale for Growth



Regional Realities Shaping Growth

Each region has distinct dynamics and headwinds. To truly win in the evolving technology landscape, partners must understand and adapt to regional nuances with strategic precision.

Each chapter on Regional Nuances is designed as a companion to the main DoT Global Report, providing additional context to help you understand the technology landscape from a regional perspective. Sections should be reviewed alongside the global findings to give you a complete picture of what is most relevant to channel partners in each market.



North America

Partners lead in high-growth areas like cloud and AI, but a highly competitive market demands strategic clarity and operational agility. To outpace competition, partners must strengthen capabilities in next-gen technologies and deliver integrated, customer-centric solutions.

LAC

LAC partners are uniquely positioned for growth, driven by aggressive investment in high-growth areas. There is a strong opportunity to invest in strategic support, specifically around challenge areas like AI integration, to translate enthusiasm into measurable customer value.

Europe

European partners' compliance-driven foundation creates a robust path to future success. Partners must continue to invest in innovative and compliant solutions that can differentiate them in a competitive market.

APJ

APJ's rapid growth presents a strong opportunity for partners to capitalize on a dynamic market. Partners must continue scaling service-based offerings, expand high-growth technologies, and close the skills gap.

REGIONAL REALITIES SHAPING GROWTH

Asia Pacific and Japan Nuances: The Opportunity to Scale for Growth



APJ remains one of the **fastest-growing regions** in the world, despite slower growth momentum in 2025.

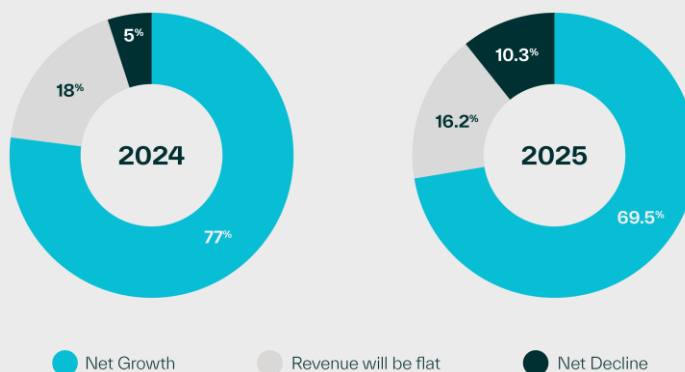
This chapter on APJ Regional Nuances is designed as a companion to the main DoT Global Report, providing additional context to help you understand the technology landscape from a regional perspective. This should be reviewed alongside the global findings to give you a complete picture of what is most relevant to channel partners in each market.

“ The outlook in APJ remains **positive**, with **significant opportunities** in high-growth technologies. AI, cybersecurity, and data and analytics are **driving change** across the ecosystem, and partners are investing to ensure these technologies are available to meet customer demand. Navigating this landscape involves many moving parts, and partners need a distributor who not only **simplifies complexity** and **accelerates** go-to-market, but also orchestrates these elements **seamlessly** to deliver **tailored solutions** for today’s challenges. As a value-added distributor with an end-to-end portfolio, our solutions, platforms, and capabilities **empower partners to scale with agility and capture growth**.

Jaideep Malhotra, President, TD SYNEX Asia Pacific & Japan

FIGURE 23

APJ remains one of the fastest-growing regions in the world, despite slower growth momentum in 2025.



Due to intensifying competition and a heightened sensitivity to macroeconomic conditions, optimism for the -future is low.

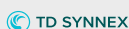
Amid a fast-evolving and highly competitive landscape in an era of complex digital transformation underpinned by the GenAI revolution, the key concerns for partners include economic conditions that include inflation, rising costs, and interest rates and difficulty in hiring talent.



The survey was conducted during the period of uncertainty around the Liberation Day tariffs, which may have impacted optimism for the future scores.

FIGURE 24

Macroeconomic Concerns: APJ v. Global Average. Highlight APJ.



● APJ ● Global Average

Source: 4th Annual Direction of Technology Report



#1

Challenge when scaling IT services = "increasing competition"

50.7% of APJ channel partners cite "increasing competition" as their top challenge when scaling IT operations (compared to 47.9% globally).

#1

Macroeconomic concern = "increasing market competition"

83.4% of APJ channel partners are concerned about "increased market competition" (compared to 74.9% globally).

The **future of growth** is defined by three clear imperatives.



#1

Continue scaling foundational offerings.



#2

Expand high-growth technologies.

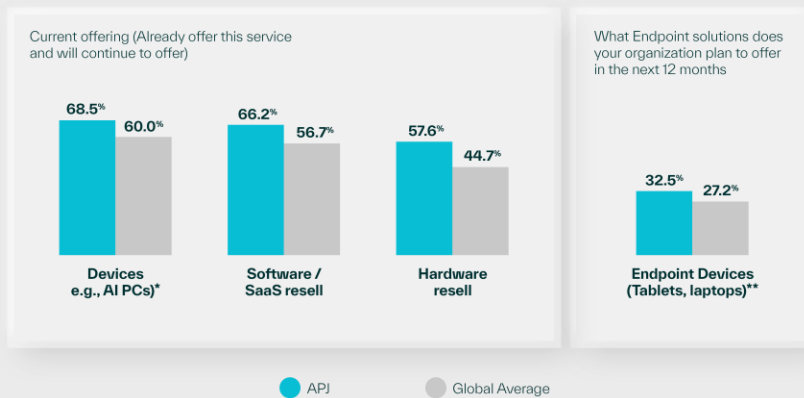


#3

Proactively close the skills gap.

FIGURE 25

Partners already show strong focus on foundational offerings like hardware and software resell.

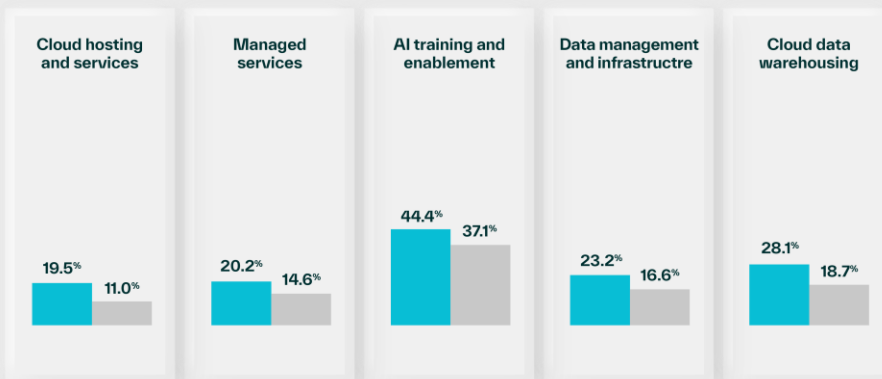


TD SYNnex

*69.0% of Japanese partners offer or plan to offer devices (e.g., AI PCs)
 **32.8% of Japanese partners offer endpoint devices in the next 12 months

FIGURE 27

And, there's a clear path forward to grow higher-value services.



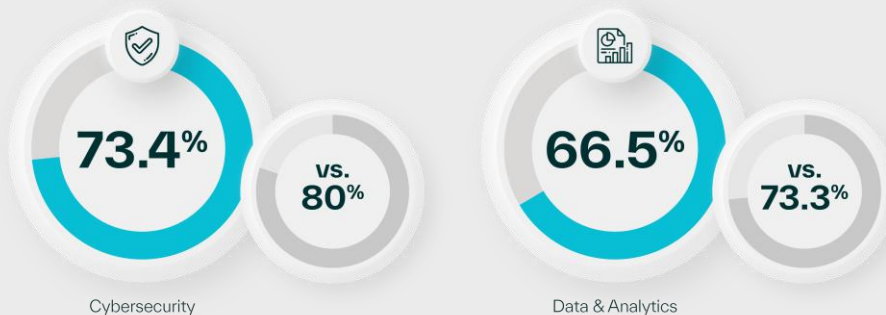
TD SYNnex

Source: 4th Annual Direction of Technology Report

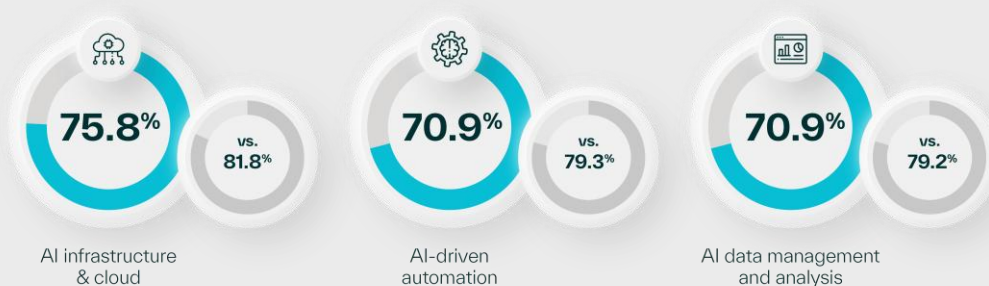
FIGURE 28



There's also a lot of opportunity to expand high-growth technologies. The upside is tremendous – high growth technologies are linked to more sustained growth.



AI specific areas include:



Japan: Strong intent in hardware resell & endpoint devices in the next 12 months

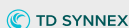
- 71.6% offer or plan to offer hardware resell
- 68.7% offer or plan to offer devices (e.g., AI PCs)
- 32.8% plan to offer endpoint devices

India: Strong intent in AI and data management in the next 12 months

- 87.3% offer or plan to offer AI infrastructure & cloud solutions
- 85.9% offer or plan to offer generative AI
- 83.1% offer or plan to offer data management and infrastructure

Singapore: Strong intent in advanced services, analytics, and security in the next 12 months

- 90.6% offer or plan to offer managed services
- 88.7% offer or plan to offer hybrid infrastructure
- 81.1% offer or plan to offer AI-powered cybersecurity



● APJ ● Global Average

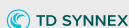
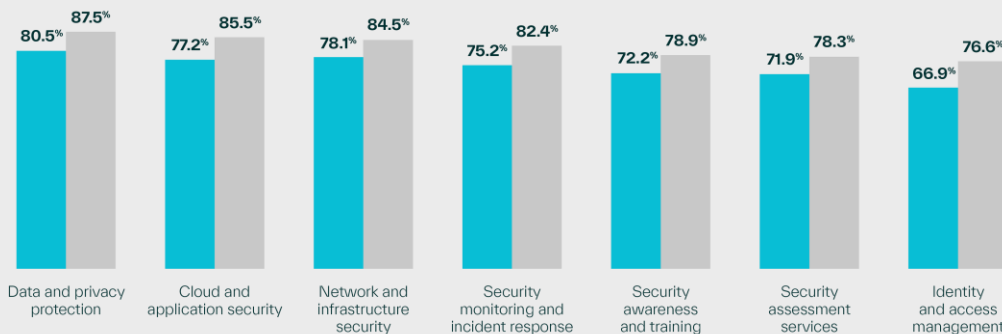
Source: 4th Annual Direction of Technology Report

FIGURE 29



Cybersecurity: Key differences APJ v. Global

Already offer this service and will continue to offer, plus don't offer today, but plan to launch this service



● APJ ● Global Average

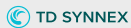
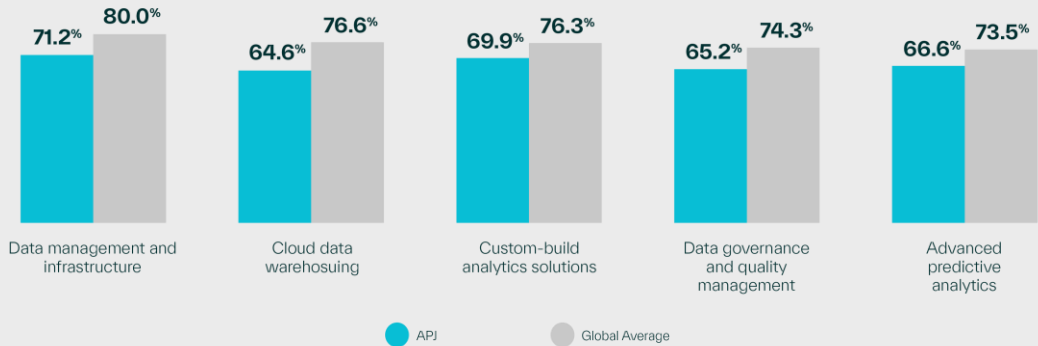
Source: 4th Annual Direction of Technology Report

FIGURE 30



Data & Analytics: Key differences APJ v. Global

Already offer this service and will continue to offer, plus don't offer today, but plan to launch this service



Source: 4th Annual Direction of Technology Report

Proactively closing the skills gap will be **integral** to **enable innovation, efficiency, and growth.**

#1

Challenge when implementing AI, data & analytics, or cybersecurity solutions = "skills gap"

52.0% of APJ channel partners say "talent shortage/skills gap" is their biggest challenge when implementing AI solutions.

Data & analytics: **49.7%** of APJ channel partners say "skills gap and expertise limitations" is their biggest challenge when implementing data & analytics solutions.

Cybersecurity: **48%** of APJ channel partners say "skills gap and expertise limitations" is their biggest challenge when deploying, developing, or maintaining cybersecurity solutions.

#2

Challenge when scaling IT services = "talent recruitment & retention"

41.7% of APJ channel partners cite "talent recruitment and retention" as their top challenge when scaling IT operations (compared to **34.7%** globally).

#2

Macroeconomic concern = "difficult in hiring or retaining talent"

79.8% of APJ channel partners are concerned about "difficulty in hiring or retaining talent" (compared to **68.8%** globally).

The Bottom Line

APJ leaders should leverage partnership support, continue scaling foundational offerings, expand high-growth technologies, and proactively close the skills gap to best foster positive growth and competitive advantage into the future.

Partner Spotlight: Wysetek



My conversation with Tech Data is always, 'What new, what more exciting are you getting to the table?' Which is **good**. I want to simplify technologies. They simplify, making sure that we can go and sell technologies to the customer. That's where Wysetek and Tech Data **combine together to showcase the right solution to the customer**.

Cherian Thomas, Co-Founder, Wysetek Systems Technologists

Partner Spotlight: Tech Data Solutions

Tech Data Center of Excellence (CoE) Tech Data's CoE simplifies the complexity of building and delivering complete solutions to technology partners. As trusted advisors on solutions aggregation, we extend support and absorb the complexity from ideation to execution, freeing up partners to focus on what they do best. The CoE is built on four core pillars: an adaptive regional approach, a simplified solutions aggregation model, enablement tools, resources and platforms, and subject-matter experts to serve as trusted advisors for high-growth technologies.

Explore 

Tech Data Practice Builder Our market enablement efforts are offered through both a digital and hybrid Practice Builder - training that caters to a wide audience, but is customized for high-growth technologies and our partners' specific needs. Our range of Practice Builder programs provides channel partners with essential tools, resources and people to expand business capabilities. We take a holistic approach to training, whether it be strategy planning, certifications, sales readiness or marketing efforts.

Explore 

Tech Data Capital Cutting-edge technology should be accessible to all organizations without financial restraints. Our goal is to empower businesses to innovate without the burden of upfront costs. With more modern businesses relying on flexible payment options for IT investments, Tech Data Capital is committed to turning IT dreams into reality. Tech Data Capital is designed to seamlessly integrate with your sales process, preserve your credit line, and serve as a one-stop-shop for products and payment solutions.

Explore 

FIGURE 26

Partner Breakdown.

% of channel partners offer or plan to offer

