CHANNEL BENCHMARKING

DEMO

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compuBase
The Leading Business Intelligence Company for the ICT Indirect Channel
www.compubase.net
Executive Summary

- The survey:

This study has been completed using the compuBase database. The main dataset of this study includes ICT service providers, software editors or resellers who resell UPS products to and within the B2B and the B2C market.

The segmented selections as described in the column below have been applied to the compuBase database to meet Brand1’s requirements:

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</tr>
<tr>
<td></td>
<td>Software publishers (IT &amp; Telecom activities)</td>
</tr>
<tr>
<td></td>
<td>Services (IT &amp; Telecom activities)</td>
</tr>
<tr>
<td>The company must resell at least one</td>
<td></td>
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<tr>
<td>the following products</td>
<td></td>
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<tr>
<td></td>
<td>UPS</td>
</tr>
<tr>
<td>Must be</td>
<td>Headoffice</td>
</tr>
<tr>
<td>Exclusions</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Other non IT activities</td>
</tr>
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<td>Inclusion(s)</td>
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The main segmented dataset contains 2714 companies.

The aim of the study is to compare Brand1’s channel vs. its main competitors’ channel and to reveal its strengths and weaknesses thereby gaining a better understanding of Brand1’ partners profile across Germany.
Coverage:

Brand1's channel is ranked in the first position with 661 partners declaring Brand1 as one of their top 3 resold brands. That is about 24% of partners who declared to resell UPS and who have in the same time one of the following IT & Telecom activities: resale, software publishing or services.

The following brands in terms of volume are Brand3 (very close, with 641 partners) and in third place Brand2 with (191 partners).

Brand6 has less than 100 identified partners.

However, it must be underlined the fact that not all the brands were taken into account within this analysis. Some important competitors might therefore have been left out.

Brand1 Partner typology:

Partner size (p24-28):

Brand1 partners belong to the groups of SMB companies (25-249 employees) and a few very large size companies (more than 500 employees). Brand1’s strategy being oriented towards a good regional coverage, the company tends to work with many small-medium and regional resellers.

This trend differs from one brand to another, but overall the competitors tend also to work with small and medium sized companies.

Like all the other brands, Brand1 channel partners are experienced and established companies where 99% of the partners are more than 5 years old.

Partner activity (p29 - 31):

Brand1’s network is situated in fourth position with channel partners whereof the main activities are reselling to individuals and on fourth position for IT services respectively.

All partners’ brands are basically oriented towards these two activities. Reselling is dominant within the channel. However, we distinguish therefore two main groups:

- Partner companies more oriented towards reselling
- Partner companies more oriented towards services (compared to the competitors)

Brand1 belongs to the first category.

Partner revenue origin (p32-35):

- Brand1 maintains a channel network where ICT resale generates the main source of revenues (73%), and where both resale and services (25%) come in a mid position compared to all the other competitors.
- Office equipment hardware and system revenues are an important part of revenue for Brand1 partners (56% in total). Brand1 performs above the average for office equipment sales and comes on top position.

Brand1 Partner’s Sales Target: by Size of targeted enterprise (p46-48):

- Very strong targeting government bodies
- Strong for SOHO accounts
- Slightly above the average targeting large sized firms
- 75% of revenue from Brand1 partners has enterprises as origin
Brand1 partner’s coverage (p50):

- **Brand1** is well represented by channel partners with a regional and nationwide coverage, and also receives an above average scoring for partners with a local and international coverage.

Brand1 Partner’s Sales Target: Vertical business (p51-55):

- **Brand1** partners are very well covered by partners who vertical address services activities and government bodies compared to those addressing the industrial activities. However, the less covered activities also belong to the services sectors.
- **Brand1** is less present on the industry vertical market, opposite to **Brand6** and **Brand7**, who prevail in this sector.
- The services represent overall 25% of Brand1 partners’ revenue (p57) and within the services activity, the distribution services and the other services represent an important component for **Brand1** partners (p58).

Sales Methods (p58):

- **Brand1** partners declare to be above average, like all the other brands, for the online commerce.
- The majority of channel partners use common sales methods such as sales via a catalogue, sales through a dealer network and sales through a wholesaler (except **Brand3** and **Brand5** for the latter sales method).

Technical skills of Brand1 partners (p59-64):

- **Brand1** partners declared to be focused and skilled in areas such as Executive Information Systems, Application Server and Storage Are Network.
- In exchange, **Brand5** partners are more oriented towards Naval Industry, Primary sector and Government/State skills.
- Compared to its competitors’ channel, **Brand1**’s channel is less linked to the proprietary platform universe as well as LINUX / UNIX universes. 83% of their revenue has a Microsoft platform as origin. This is strongly linked to the fact that **Brand1** is less industry-oriented compared to its main competitors.

Competition inside Brand1 Channel (p5; 15-20; 65):

- Channel competition represents an important issue. When a reseller has a choice to sell a certain product, he may recommend one brand or another. This attitude depends on several variables such as margin, confidence, sales support, technical issues, etc...
- To gain market vs. the competition, **Brand1** has to make sure that its brand will be proposed to the client. A survey on competition inside the channel represents a key issue, especially when direct competitors are strongly present within its natural channel.
- Within the **Brand1**’s channel, **Brand5** seems to be the most severe and business threatening competitor on the 7 presented market segments. **Brand5** has a large network of resellers and a big overlap with **Brand1**’s channel. **Brand5** and **Brand2** top the overlap with **Brand1** from a market segmentation point of view.
- Finally, the channel overlap gives an important view on the competitors and calculating the number of common channel partners is very important. This can be done in volume as the number of common partners, or in percentage of the total
common partners vs. the partners’ channel volume. Brand7 and Brand3 currently share a relevant number of resellers with Brand1 as far as the overlap percentage of partners is concerned. In terms of volume, Brand5 tops the overlap with Brand1 channel, also due to the fact that its network is the most consistent in terms of volume.
As a leading company on UPS, **Brand1** does not have one single main competitor but various competitors according the different market segments.

- ‘Large Accounts’ competition; the top competitors are: Brand6 & Brand7.
- ‘SMB’ competition; the top competitors are: Brand4 and Brand7.
- The most similar competitor to Brand1 is Brand5, except on partner’s large account partners and partners influenced by the local market.

**Brand1** channel position at a glance:

![Brand1 Res. UPS vs. Market](image)

*Chart 1. Brand1 channel compared to channel on 7 different axes – Extremes show a strong position for the referent axis.*

- In all graphics “Res.” stands for Reseller.

**Axis explanation:**

- Coverage of “Large partner”: Partner’s coverage having 10 employees and more.
- Coverage of “Young Partner”: The higher the score is, the younger the channel is (in terms of set up date).
- Coverage on “Local influence”: The higher the score is, the more oriented towards local sales the channel is (vs. national & international).
- Consumer trend: Indicator mixing coverage and revenue from individuals.
- SMB oriented: Indicator mixing coverage and revenue from SMB.
- Large account oriented: Indicator mixing coverage and revenue from Large accounts.
- Service Market driven: The higher the score is, the more important the revenue issued from end user clients working in Services businesses is.
Compared to the market, the Brand1 network is:

- **Higher on:**
  - Partners targeting large accounts (25.3% vs. 18.3%)
  - Partners targeting consumer markets (29.4% vs. 23.4%)
  - Partners targeting large size companies (50.5% vs. 41.9%)
  - Local markets (29.9% vs. 17.3%)

- **Nearly equal on:**
  - none

- **Lower on:**
  - New partners (1.8% vs. 3.6%)
  - Partners targeting services market (25.2% vs. 34.8%)
  - Partners targeting SMB companies (58.2% vs. 74.2%)

*Note:* Due to the importance of Brand 1 and Brand3 channel volume within the main dataset their partner profiles are strongly influencing the main dataset results. Brand1 and Brand3 characterize the market and therefore don’t have too many particularities when compared to the market. Consequently, when a difference appears between the main dataset and Brand1 and Brand3 results, these differences are showing strong variations vs. the market.
The Channel Benchmarking underlines the strengths and weaknesses of Brand1’s channel distribution network.

With this information, **Brand1 can determine the typology of the partners it needs to work on.**

For instance, it would seem interesting to evaluate the opportunity of recruitment of future partners on those who qualify in one or many of these skills:

**Note:** After studying this report and comparing Brand1 coverage with the current business opportunities, by using either the compuBase database relevant criteria or the compuBase Ranking Service which are provided separately, **Brand1 will list the typology of partners to recruit.**

What to do: Step By Step

1. Find out the weaknesses in your channel and compare the results of the Channel Benchmarking® to your development strategy.
2. Perform a Channel Ranking® to find out the top partners by revenue for your selection.
3. Find out the share of wallet®, top partner list by revenue, and history of sales coming from your sales out reports.
4. Perform a Scoring®, discover the best potential partners by scoring them according to your most relevant business criteria.

*More info on page 13.*

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1See page 13.
Executive Summary 1
- The survey: 1
- Coverage: 2
- Brand1 Partner typology: 2
- Next steps: 7

Channel Benchmarking Analysis Thematic 8

Mapping Framework 9
- Market description: 9
- List of datasets: 11
- Activities excluded from survey: 11
- Available on line data: 11
- Analysis and Data collection methods: 12
- Deliverables: 12
- Updates: 12
- Additional services: 13

General Channel analysis: 14
- Main Competitors: Seven axis comparison 14

Glossary 21

Brand Position: 25
- vs. partners’ size (Number of employees - Revenue) 25
- vs. age of partners (set up date) 29
- vs. type of partners (Main activities) and Revenue organisation 30
- Comparison between datasets on Main Activity 31
- Comparison between datasets on company revenue breakdown per product category 33
- vs. partner’s resale activities 42
- vs. partner’s type of products in catalogue for resale 45
- vs. partners’ client target 55
- vs. partners client’s market (vertical market) findings 60
- vs. partners client’s market (vertical market) charts 62
- vs. partner sales methods 67
- vs. partners client’s skills findings 68
- vs. partners client’s skills charts 70
- vs. partner’s other brand channel findings 74

ANNEXES 75
- Volumetric by main activity (Main dataset) 76
- Volumetric by sub activities (Main dataset) 77

Definitions 78
- Main activity Definitions: 78
- Secondary and important activities definitions 79

About compuBase: 81
Market description:

This study has been completed using the data from the compuBase database. The main dataset of this study includes ICT service providers, software publishers and/or resellers who resell UPS products to and within the B2B market.

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<tr>
<td>Inclusion(s)</td>
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The main dataset contains 2714 companies.

The survey covers Germany. The segmented dataset is extracted from compuBase’s German ICT partner database, containing over 19921 IT and Telecoms partners.

This Market description is referred in the survey as the Main Dataset (Dataset 1). All sub datasets are compared to this one and included in it. *The main dataset is NOT the sum of all sub datasets, but the considered market.*
### List of datasets:

<table>
<thead>
<tr>
<th>Dataset</th>
<th>Res. UPS</th>
<th>Volume</th>
<th>Dataset</th>
<th>Brand</th>
<th>Volume</th>
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<tr>
<td>Dataset 1</td>
<td></td>
<td>2714</td>
<td>Dataset 5</td>
<td>Brand4</td>
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<tr>
<td>Main Target Res. UPS (*)</td>
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<td>Res. UPS Brand4</td>
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<td>Dataset 2</td>
<td>Brand1</td>
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<td>Dataset 6</td>
<td>Brand5</td>
<td>641</td>
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<td>Res. UPS Brand1 (**)</td>
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<td>Res. UPS Brand5</td>
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<td>Dataset 7</td>
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<td>Res. UPS Brand2</td>
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<td>Res. UPS Brand6</td>
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<tr>
<td>Dataset 4</td>
<td>Brand3</td>
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<td>Dataset 8</td>
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<tr>
<td>Res. UPS Brand3</td>
<td></td>
<td></td>
<td>Res. UPS Brand7</td>
<td></td>
<td></td>
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</tbody>
</table>

(“*) (Channel benchmarking - target selected by Brand1)

(“**”) (Brand1 represents the client for whom the Benchmarking is performed)

### Activities excluded from survey:

The following activities have been excluded from the survey:

- Hardware manufacturers (IT & Telecom activities)
- Other non IT activities

Business definitions are described in Annexes.

### Available on line data:

Brand1 is offered the possibility to subscribe to all or part of the data used for this survey. The defined volume contains 2714 company profiles.

Click here to access a DEMO and receive further information

[www.compubase-online.com](http://www.compubase-online.com)
Analysis and Data collection methods:

The analysis has been performed on the data available in the compuBase database at the date of the survey. Survey date: 13/06/2008

The information used was collected during the twelve months before this survey.

As data is collected throughout the year, it is fair to say that it gives a good idea of what the market was like 6 months ago.

Data were collected through two main methods:

- Telemarketing
- Web questionnaires

You can see a sample of the questionnaire at the following web address:


Demo Login: Quest
Demo Password: Demo

Important Notice:

- Questions concerning the split of revenue were based on percentage of revenue.
- Companies realising more than 100M€ of revenue have been excluded from the revenue analysis.
  - This exclusion is done to valorise differences within the larger number of partners.
  - The effect is to lower the importance of
    - Mass Market Distribution (consumer) when included.
    - Very large dealer for Large account

and to give a better understanding of SMB channel

- Total revenue was collected separately from official sources or estimated when not available.

Deliverables:

You can access all the data used in this survey if you are a subscriber to the compuBase online access Full Profile Expert Level solution and have the main dataset target as subscriber perimeter.

Most of the statistic counts (except the split of revenue) can be done with the compuBase online software.

Updates:

compuBase can make updates of this report;

We advise to make updates every 6 months.
● Additional services:

In addition to this Channel Benchmarking, the following services can be performed.

Channel Ranking

The Channel Ranking service uses the same main dataset and provides estimated revenues for a specific category of product for each partner. The Ranking helps vendors find out the top partners by region. Using Channel Ranking after or with a Benchmarking helps you to speed up focused recruitment Operations on top potential partners.

The Ranking provides the following information: company name, region, revenue, source of revenue, % of revenue for the categories, range of revenue for the categories, confidence notation.

The share of wallet

The share of wallet compares your revenue with your partners’ revenue for a specific category of product.

Channel Scoring

The Scoring consists in a qualitative study on the distribution network, to evaluate the potential or existent partners taking into account their capacity to belong to a pre-defined profile. The profile is determined by creating and saving a selection of attributes with the help of the target module. Each selection corresponds to a business profile.

An analysis is provided with the scored target.

Channel Mirroring

The Mirroring consists in a qualitative study on the distribution network, to evaluate the potential or existent partners taking into account their capacity to belong to a pre-defined profile. The profile is determined by matching your partners’ database with the compuBase database.

An advanced datamining approach is applied on the target in order to determine the best criteria, followed by a statistical interpretation.
General Channel analysis:

- **Main Competitors: Seven axis comparison**

  **Axis explanation:**

  ➔ **3 indicators focus on partners’ specificities:**
  - Large Partner driven: Ratio of partners having 10 employees and more.
  - Young Partner driven: the higher the score is, the younger the channel is (set up date).
  - Local influence driven: the higher the score is, the higher the score for local sales is (vs. national & international sales).

  ➔ **4 indicators focus on partners’ customers:**
  - Consumer market driven: Indicator mixing coverage and revenue for individual.
  - SMB market driven: Indicator mixing coverage and revenue for SMB.
  - Large account market driven: Indicator mixing coverage and revenue for Large account.
  - Client from Service Market driven: the higher the score is, the higher the revenue issued from end user clients working in Services businesses is (vs. Industry).

  ![Diagram](image-url)
Brand2 channel position at a glance:

Brand2 vs. Market and Brand1

Brand2 vs. Res. UPS

- Brand2’ coverage is higher than the market for:
  - Large account partners (33.8% vs. 18.3%)
  - Partners targeting consumer markets (36.8% vs. 23.4%)
  - Local sales partners (26.6% vs. 17.3%)
  - Large size partners (49.7% vs. 41.9%)
- Brand2’ coverage is nearly equal to the market for:
  - New partners (3.8% vs. 3.6%)
- Brand2’ coverage is lower than the market for:
  - SMB market partners (59.3% vs. 74.2%)
  - Service market partners (33.2% vs. 34.8%)

Brand2 vs. Brand1

- Brand2’ coverage is higher than Brand1 for:
  - Large account partners (33.8% vs. 25.3%)
  - Service market partners (33.2% vs. 25.2%)
  - New partners (3.8% vs. 1.8%)
  - Partners targeting consumer markets (36.8% vs. 29.4%)
- Brand2’ coverage is nearly equal to Brand1 for:
  - SMB market partners (59.3% vs. 58.2%)
- Brand2’ coverage is lower than Brand1 for:
  - Large size partners (49.7% vs. 50.5%)
  - Local sales partners (26.6% vs. 29.9%)
**Brand3 channel position at a glance:**

![Brand3 vs. Market and Brand1](image)

**Brand3 vs. Res. UPS**
- **Brand3**’ coverage is higher than the market for:
  - Local sales partners (27.6% vs. 17.3%)
  - Large size partners (50.9% vs. 41.9%)
  - Partners targeting consumer markets (56.8% vs. 23.4%)
- **Brand3**’ coverage is nearly equal to the market for:
  - Large account partners (16.9% vs. 18.3%)
- **Brand3**’ coverage is lower than the market for:
  - New partners (1.9% vs. 3.6%)
  - Service market partners (19.8% vs. 34.8%)
  - SMB market partners (51.3% vs. 74.2%)

**Brand3 vs. Brand1**
- **Brand3**’ coverage is higher than **Brand1** for:
  - Partners targeting Consumer markets (56.8% vs. 29.4%)
- **Brand3**’ coverage is nearly equal to **Brand1** for:
  - Large size partners (50.9% vs. 50.5%)
  - New partners (1.9% vs. 1.8%)
- **Brand3**’ coverage is lower than **Brand1** for:
  - Service Market partners (19.8% vs. 25.2%)
  - Large account partners (16.9% vs. 25.3%)
  - SMB market partners (51.3% vs. 58.2%)
  - Local sales partners (27.6% vs. 29.9%)
**Brand4 channel position at a glance:**

**Brand4 vs. Res. UPS**
- **Brand4** coverage is higher than the market for:
  - Large size partners (57.0% vs. 41.9%)
  - New partners (5.9% vs. 3.6%)
  - Local sales partners (22.6% vs. 17.3%)
  - Large account partners (38.0% vs. 18.3%)
- **Brand4** coverage is nearly equal to the market for:
  - Partners targeting Consumer markets (23.9% vs. 23.4%)
- **Brand4** coverage is lower than the market for:
  - Service market partners (29.8% vs. 38.4%)
  - SMB market partners (63.0% vs. 74.2%)

**Brand4 vs. Brand1**
- **Brand4** coverage is higher than **Brand1** for:
  - Large size partners (57.0% vs. 50.5%)
  - Large account partners (38.0% vs. 25.3%)
  - New partners (5.9% vs. 1.8%)
  - SMB market partners (63.0% vs. 58.2%)
  - Service market partners (29.8% vs. 25.2%)
- **Brand4** coverage is nearly equal to **Brand1** for:
  - none
- **Brand4** coverage is lower than **Brand1** for:
  - Partners targeting Consumer markets (23.9% vs. 29.4%)
  - Local sales partners (22.6% vs. 29.9%)
**Brand5 channel position at a glance:**

**Brand5 vs. Market and Brand1**

![Graph showing Brand5 vs. Market and Brand1]

- **Brand5**'s coverage is higher than the market for:
  - Large size partners (51,0% vs. 41,9%)
  - Large account partners (32,2% vs. 18,3%)
  - Local sales partners (24,6% vs. 17,3%)
  - Partners targeting Consumer markets (33,5% vs. 23,4%)

- **Brand5**'s coverage is nearly equal to the market for:
  - New partners (2,5% vs. 3,6%)

- **Brand5**'s coverage is lower than the market for:
  - SMB market partners (61,6% vs. 74,2%)
  - Service market partners (28,6% vs. 34,8%)

**Brand5 vs. Res. UPS**

- **Brand5**'s coverage is higher than the market for:
  - Large size partners (51,0% vs. 41,9%)
  - Large account partners (32,2% vs. 18,3%)
  - Local sales partners (24,6% vs. 17,3%)
  - Partners targeting Consumer markets (33,5% vs. 23,4%)

- **Brand5**'s coverage is nearly equal to the market for:
  - Large size partners (51,0% vs. 50,5%)
  - New partners (2,5% vs. 1,8%)

- **Brand5**'s coverage is lower than the market for:
  - Local sales partners (24,6% vs. 29,9%)
Brand6 channel position at a glance:

**Brand6 vs. Res. UPS**
- **Brand6** coverage is higher than the market for:
  - Large account partners (52.3% vs. 18.3%)
  - New partners (7.5% vs. 3.6%)
  - Large size partners (68.1% vs. 41.9%)
  - Local sales partners (22.5% vs. 17.3%)
- **Brand6** coverage is nearly equal to the market for:
  - none
- **Brand6** coverage is lower than the market for:
  - Partners targeting Consumer markets (13.6% vs. 23.4%)
  - SMB market partners (60.9% vs. 74.2%)
  - Service market partners (0.0% vs. 34.8%)

**Brand6 vs. Brand1**
- **Brand6** coverage is higher than **Brand1** for:
  - Large account partners (52.3% vs. 25.3%)
  - SMB market partners (60.9% vs. 58.2%)
  - Large size partners (68.1% vs. 50.5%)
  - New partners (7.5% vs. 1.8%)
- **Brand6** coverage is nearly equal to **Brand1** for:
  - none
- **Brand6** coverage is lower than **Brand1** for:
  - Partners targeting Consumer markets (13.6% vs. 29.4%)
  - Service market partners (0.0% vs. 25.2%)
  - Local sales partners (22.5% vs. 29.9%)
Brand7 channel position at a glance:

Brand7 vs. Market and Brand1

- **Brand7**' coverage is higher than the market for:
  - Large account partners (39.7% vs. 18.3%)
  - Large size partners (61.2% vs. 41.9%)
  - Partners targeting Consumer markets (31.6% vs. 23.4%)
  - Service market partners (41.4% vs. 34.8%)
  - Local sales partners (23.9% vs. 17.3%)

- **Brand7**' coverage is nearly equal to the market for:
  - New partners (3.5% vs. 3.6%)

- **Brand7**' coverage is lower than the market for:
  - SMB market partners (62.0% vs. 74.2%)

Brand7 vs. Res. UPS

- **Brand7**' coverage is higher than the market for:
  - Large account partners (39.7% vs. 18.3%)
  - Large size partners (61.2% vs. 41.9%)
  - Partners targeting Consumer markets (31.6% vs. 23.4%)
  - Service market partners (41.4% vs. 34.8%)
  - Local sales partners (23.9% vs. 17.3%)

- **Brand7**' coverage is nearly equal to the market for:
  - New partners (3.5% vs. 3.6%)

- **Brand7**' coverage is lower than the market for:
  - SMB market partners (62.0% vs. 58.2%)

Brand7 vs. Brand1

- **Brand7**' coverage is higher than **Brand1** for:
  - Large size partners (61.2% vs. 50.5%)
  - Large account partners (39.7% vs. 25.3%)
  - Service market partners (41.4% vs. 25.2%)
  - Partners targeting consumer markets (31.6% vs. 29.4%)
  - SMB market partners (62.0% vs. 58.2%)
  - New partners (3.5% vs. 1.8%)

- **Brand7**' coverage is nearly equal to **Brand1** for:
  - none

- **Brand7**' coverage is lower than **Brand1** for:
  - Local sales partners (23.9% vs. 29.9%)
Graphic type 1: Comparison

All percentages presented are referring to the target group.

This % indicates the % of partners for the target group with a set up date exceeding 5 years.

This indicates the different datasets used for the graphics. The colour attached to a dataset could change between graphics.
All percentages presented are referring to variation versus the main dataset.
All graphic titles for variation start with “Variation:...”
This type of graphic helps to understand the differences between brands versus the market average.

**Note:**
- The “0” axe represents the Res. UPS.
- When vertical bars are at “0%” it indicates a lack of data, insufficient number of response for the category to realize comparison.
Graphic type 3: Revenue Split

All percentages presented are referring to the revenue.
All graphic titles for revenue start with “Revenue:...”
100 % always represents the total revenue of the company (not only ICT revenues.)
This type of graphic helps you understand the differences in the origins of revenues between the various studied groups.

Important Note: For all revenue split analysis,
- All companies realising more than 100M€ of revenue have been excluded.
  - This exclusion is done to valorise differences within the larger number of partners.
  - The effect is to lower the importance of
    - Mass Market Distribution (consumer)
    - Very large dealer for Large account
and to give a better understanding of the SMB channel.
- Revenue Split is only surveyed for the HQ.
- When stacked bars equal “0%” it means: insufficient data available to realize this comparison.
Graphic type 4: Breakdown by revenue range per product category

Percentages refer to the companies situated within a revenue range corresponding for the analyzed product category.

All graphic titles for revenue start with “Breakdown by revenue range...”

100 % always represents the total number of selected companies.

This type of graphic helps you understand the partners’ market potential in the analyzed product category.

Important Note: For all revenue split analysis,

- The results are obtained via a Ranking operation for the product category for which the Benchmarking is performed
- Total should be equal to 100%
- All companies are presented with their revenue in the cited product category
- The revenue Split is only reviewed for the HQs.
Brand Position:

- vs. partners’ size
  
  (Number of employees - Revenue)

---

**Chart 2. Brand’s dataset comparison by number of employees – % on volume of partners.**

**Graph info:** This graph shows the size of partner in number of employees for the main dataset.

**Comments:**

- 47% of the Brand1 partners have less than 9 employees
- Approximately 29% of Brand1 partners have more than 25 employees
- Brand1 and Brand3 have more large size partners
- Brand1 has a partner size above the market average, except for the 1-4 person companies
Chart 3. Brand’s dataset comparison by number of employees – Variation vs. Main Dataset on % volume of partners.

Graph info: This graph shows differences between datasets vs. the main dataset. The main dataset is represented by the line 0%. A positive variation indicates that the corresponding dataset overweighs the market average. A negative variation indicates that the corresponding dataset is less than the market average.

Comparison on the number of employees

- **Brand3** and **Brand1** outweigh the market with large size partners.
- **Brand6** looks to be strong with mid-sized partners.
- **Brand3** is weaker with mid-sized partners (50-99 employees).
- **Brand3** appears to be stronger with small-sized partners (10-24 persons).
Chart 4. Brand’s dataset comparison by range of revenue – Volume of partners’ main dataset compared to the other dataset.

Graph info: This graph shows the size of partners in revenue for the main dataset, each range represents number of company having declared to have revenue corresponding to the indicated range.

Comments: volume of partner by revenue

- 59% of the Brand1 partners own less than 2 M€ TO.
- 14% of the Brand1 partners have over 10 M€ in TO.
Chart 5: Brand’s dataset comparison by revenue – Volume of partners – Variation vs. Main Dataset on % volume of partners.

Graph info: This graph shows differences between datasets vs. the main dataset, the main dataset is represented by the line 0%. A positive variation indicates that the corresponding dataset overweighs the market average; a negative variation indicates that the corresponding dataset is under the market average. A bar could lack if not enough companies are available for the corresponding segment.

Comparison by Revenue:

- **Brand3, Brand6 and Brand1** are well represented by large revenue partners.
- **Brand7** outweighs the market representation among partners with 3 to 5M€ of revenue.
- **Brand2 and Brand7** slightly outweigh the market for partners with revenues between 0.5 and 1M€ of revenue.
• vs. age of partners (set up date)

![Comparison between datasets set up date chart]

*Chart 6. Brand's dataset comparison between partners' set up date.*

**Graph info:** This graph shows the age of the companies belonging to each dataset.

**Comparison by age of companies:**

- The UPS market is directed towards established partners. 98% of partners are 5 years-old or more.
- **Brand4** and **Brand6** networks are the newest. 3% and 4% respectively of their partners are less than 5 years-old.
- The other networks are older. 98-99% of the partners are 5 years-old or more.
• vs. type of partners (Main activities) and Revenue organisation

The following graphics and tables show the differences between the partners’ main activities. Each main activity is usually linked to one specific business model.

For more information on the specificities of these different models, please contact your compuBase Consultant.

Vendors should adapt their market strategy depending on their partners. Working with ISV partners on vertical market or working with B2B resellers require different approaches.

All main definitions are described in annexes.

<table>
<thead>
<tr>
<th>Main Activity</th>
<th>Res. UPS</th>
<th>Brand1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GERMANY</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activities according main activity - compuBase Activity Index</td>
<td>Volume</td>
<td>%</td>
</tr>
<tr>
<td>Manufacturer</td>
<td>13</td>
<td>0%</td>
</tr>
<tr>
<td>Software publisher</td>
<td>14</td>
<td>1%</td>
</tr>
<tr>
<td>Publisher of software for a specific activity</td>
<td>24</td>
<td>1%</td>
</tr>
<tr>
<td>Publisher of software for a specific process of companies</td>
<td>21</td>
<td>1%</td>
</tr>
<tr>
<td>Software solutions integrator (developed by third parties)</td>
<td>24</td>
<td>1%</td>
</tr>
<tr>
<td>IT services, Software development (hosting, maintenance, training, bespoke software development...)</td>
<td>1095</td>
<td>40%</td>
</tr>
<tr>
<td>Telecom services (Telecom operator, ISP...)</td>
<td>11</td>
<td>0%</td>
</tr>
<tr>
<td>Telecom &amp; network infrastructure integrator</td>
<td>15</td>
<td>1%</td>
</tr>
<tr>
<td>IT infrastructure integrator</td>
<td>34</td>
<td>1%</td>
</tr>
<tr>
<td>Consulting</td>
<td>7</td>
<td>0%</td>
</tr>
<tr>
<td>Reselling to individuals</td>
<td>389</td>
<td>14%</td>
</tr>
<tr>
<td>Reselling to enterprises (hardware, software &amp; services &amp; assemblies)</td>
<td>997</td>
<td>37%</td>
</tr>
<tr>
<td>Wholesaler (resale of IT and telecom products to resellers)</td>
<td>61</td>
<td>2%</td>
</tr>
<tr>
<td>Large Assembling company</td>
<td>2</td>
<td>0%</td>
</tr>
<tr>
<td>Total Main Activity (a company has only one activity)</td>
<td>2787</td>
<td>100%</td>
</tr>
</tbody>
</table>

Chart 7. Main dataset - volume and percentage of partners.
Comparison between datasets on Main Activity

Chart 8. Brand's dataset comparison by main activity of the partners (a partner could have only one main activity) – % volume of partners.

Graph info: This graph shows the distribution of companies by main activities for each dataset. It explains the characteristics of each channel. The market is represented by the dataset Res. UPS. This graph does not indicate who has the larger group of resellers by main activity but how it is split in percentage of the main activity of companies belonging to the dataset.

Note: Brand 1’s selection includes only the following IT & Telecom activities:
- Resale (IT & Telecom activities)
- Software publishers (IT & Telecom activities)
- Services (IT & Telecom activities)

Comparison by Main activities: (weight in their channel)

- Overall, resale activities are the most represented type of partners for the UPS manufacturers’ channel (51%).
- The second most well represented type of activities is IT services and software development (40%).
- Some differences come out between the vendors:
  - Brand 3 and Brand 4’s channel network are in leading position with partners whose main activities are reselling to enterprises.
  - Brand 6 and Brand 7’s channel network is in leading position with partners whose main activities are IT services and software development.
- Brand1’s channel network is performing strong with partners whose main activities are reselling to individuals.

- Brand4 and Brand6 channel network are in leading position with partners whose main activities are IT infrastructure integration.

**Summary:** analyzing the main activity of the partners, we can see overall the same model for partnerships. However, we distinguish a first group, strong into reselling to enterprises, which includes Brand3 and Brand5 and a second group strong in leading position for IT services which includes Brand6 and Brand7. Both groups appear to be close to the market’s structure. Brand1 belongs to the first group.

**Chart 9.** Brand’s dataset comparison by main activity of the partners (a partner could have only one main activity) – Variation vs. Main Dataset on % Volume of partners.

*Graph info:* This graph shows differences between datasets vs. the main dataset. The main dataset is represented by the line 0%. A positive variation indicates that the corresponding dataset outweighs the market average; a negative variation indicates that the corresponding dataset is less than the market average.

- Brand1’s network seems to be very similar to Brand3 for Reselling to individuals and IT services and software development.

- Brand5 seems to overweigh the market for software publishers as main activity.
Comparison between datasets on company revenue breakdown per product category

**Res. UPS**

**Breakdown by revenue range per product category - Res. UPS**

*Graph info:* This graph shows the distribution of companies by ranges of revenue in the UPS analyzed product category. It shows the composition of each channel by using the revenue per product category. The market is represented by the dataset *Res. UPS*. The graph is a percentage split in terms of revenue range of the companies belonging to the target. Only companies HQs are being included. Total equals 100%.

- Overall, the majority of the target (93%) gain less than 100k€ yearly from reselling UPS
- Only 7% earn a revenue per product superior to 100k€
- The market looks very granular and only a few are well paid for selling the product
- Wholesalers play an important role in the distribution of this product
**Brand1:**

**Chart 11. Company breakdown by revenue range in the UPS product category**

**Graph Info:** This graph shows the distribution of companies by ranges of revenue in the UPS analyzed product category. It shows the composition of each channel by using the revenue per product category. The market is represented by the dataset Res. UPS. The graph is a percentage split in terms of revenue range of the companies belonging to the target. Only companies HQs are being included. Total equals 100%.

- Overall, the majority of the target (96%) gain less than 100k€ yearly from reselling UPS products
- Only 4% earn a revenue per product superior to 100k€
- The market looks very granular and only a few are well paid for selling the product
- Wholesalers play an important role in the distribution of this product
- The channel’s structure looks very similar to the market average
Brand2:

**Chart 12. Company breakdown by revenue range in the UPS product category**

Graph info: This graph shows the distribution of companies by ranges of revenue in the UPS analyzed product category. It shows the composition of each channel by using the revenue per product category. The market is represented by the dataset Res. UPS. The graph is a percentage split in terms of revenue range of the companies belonging to the target. Only companies HQs are being included. Total equals 100%.

- Overall, two thirds of the target gain less then 100k€ yearly from reselling UPS products
- 25% earn a revenue per product superior to 100k€
- Wholesalers play an important role in the distribution of this product
- The market pays out for this channel partners more than any other
- The channel looks rather competitive, with a domination of the middle-sized actors
Brand3:

**Chart 13. Company breakdown by revenue range in the UPS product category**

Graph info: This graph shows the distribution of companies by ranges of revenue in the UPS analyzed product category. It shows the composition of each channel by using the revenue per product category. The market is represented by the dataset *Res. UPS*. The graph is a percentage split in terms of revenue range of the companies belonging to the target. Only companies HQs are being included. Total equals 100%.

- Overall, the majority (97%) of the target gain less than 100k€ yearly from reselling UPS.
- Only 3% earn a revenue per product superior to 100k€
- The market looks very granular and only a few are advantaged for selling the product
- Wholesalers play an important role in the distribution of this product
Branding:

**Chart 14: Company breakdown by revenue range in the UPS product category**

*Graph info:* This graph shows the distribution of companies by ranges of revenue in the UPS analyzed product category. It shows the composition of each channel by using the revenue per product category. The market is represented by the dataset Res. UPS. The graph is a percentage split in terms of revenue range of the companies belonging to the target. Only companies HQs are being included. Total equals 100%.

- Overall, the majority (95%) of the target gain less than 100k€ yearly from reselling UPS.
- Only 5% earn a revenue per product superior to 100k€
- The market looks very granular and only are well paid for selling the product
- The channel composition looks rather similar when compared to the market average
**Brand5:**

*Chart 15. Company breakdown by revenue range in the UPS product category*

Graph info: This graph shows the distribution of companies by ranges of revenue in the UPS analyzed product category. It shows the composition of each channel by using the revenue per product category. The market is represented by the dataset Res. UPS. The graph is a percentage split in terms of revenue range of the companies belonging to the target. Only companies HQs are being included. Total equals 100%.

- Overall, the majority (95%) of the target realizes a less than 100k€ yearly from reselling UPS.
- Only 5% earn a revenue per product superior to 100k€
- The market looks very granular and only a few are well paid for selling the product
Brand6:

Chart 16. Company breakdown by revenue range in the UPS product category

Graph info: This graph shows the distribution of companies by ranges of revenue in the UPS analyzed product category. It shows the composition of each channel by using the revenue per product category. The market is represented by the dataset RéS. UPS. The graph is a percentage split in terms of revenue range of the companies belonging to the target. Only companies HQs are being included. Total equals 100%.

- Overall, 87% of the target gain less than 100k€ yearly from reselling UPS.
- 13% earn a revenue per product superior to 100k€
- The channel is different from the market average
Brand7:

Chart 17. Company breakdown by revenue range in the UPS product category

Graph info: This graph shows the distribution of companies by ranges of revenue in the UPS analyzed product category. It shows the composition of each channel by using the revenue per product category. The market is represented by the dataset Res. UPS. The graph is a percentage split in terms of revenue range of the companies belonging to the target. Only companies HQs are being included. Total equals 100%.

- Overall, the majority of the target (91%) gain less than 100k€ yearly from reselling UPS.
- Only 9% earn a revenue per product superior to 100k€
- The channel looks more granular and more concentrated on small actors like any other
Chart 18. Brand’s dataset comparison - by split of revenue - between Resale, Services & Software, Manufacturing (or representation) and Non ICT activities.

Graph info: This graph shows differences between datasets by structure of revenue. 100% represents the total revenue. The statistic has been performed excluding companies realising more than 100M€ in Turnover. The total revenue is calculated by the sum of all declared splits of revenue, the percentage is calculated by comparison of revenue of corresponding revenue to the total revenue. The #1 position represents the main dataset. The “Non ICT activities” generally represent partners’ activities addressing the end user market of non IT products.

Comparison on Source of revenue by activity:

- Within the overall network market, 65% of revenues are generated through ICT Resale.
- For the 7 major brands, this ratio varies from 67% for Brand7 to 80% for Brand2.
- Compared to the channel: Brand4, Brand6 and Brand7 tend to be more service oriented than the other brands’ partners.
- Brand3 partners have more important revenue percentage generated from the NON IT activities (7%).
- Brand1 partners have a higher percentage of revenue originated from ICT Resale when compared to the main dataset (73%).
vs. partner’s resale activities


Graph info: This graph shows differences between the datasets by structure of revenue for the resale activity. 100% represents the total revenue. The difference between the 100% line and the resale revenue are revenues originated from other than resale activities.

- With 43%, Brand2’s partners have the highest proportion of their revenue income generated from resale of ICT hardware and software products.
- With 17%, Brand6’s partners have one of the lowest shares of revenue income generated from ICT hardware and software reselling, but the highest position in terms of revenue generated from systems sales (42%).
- With 10%, Brand1’s partners have the highest proportion of their revenue income generated from Office automation equipment sales.
- With 8%, Brand2 and Brand3 partners have the highest proportion of their revenue income generated from the resale of other IT linked products.
Graph info: This graph shows differences between datasets by structure of revenue for the systems resale activity. 100% represents the total revenue, the difference between the 100% line and the resale revenue are revenues not originating from Systems resale activities.

- **Brand4, Brand5, and Brand7** have a strong position in systems originates from PC resale.

The resellers of **Brand4** are slightly stronger in revenue from pocket systems when compared to the main dataset.

**Note:** We don't dispose of enough information for Brand6 in order to be able to estimate its revenues split by systems platform.

Graph info: This graph shows differences between datasets by structure of revenue for the resale activity of Office Automation categories. 100% represents the total revenue; the difference between the 100% line and this graph are revenues not originating from Office Automation products.

- Within the main dataset, the revenues from copiers and multifunction copiers represent the biggest share of office automation partners’ revenues (2.3%).
- Brand1 partners are in highest position concerning the revenue originating from copiers and multifunction copiers.
- Brand5 partners generate the lowest revenue income from telephony equipment.
- Brand1 partners generate a revenue income from consumables resale superior to the market.

Note: Apart from Brand1 and Brand5 the other brands do not manufacture office automation equipment and therefore the revenue generated by Office automation equipment is 0%.
vs. partner’s type of products in catalogue for resale

By Main categories of products

Chart 22. Brands dataset comparison – between partners' product main categories and main categories of products – Variation of % partners reselling this category vs. the main dataset.

Graph info: This graphic shows the product ranges associated with a vendor’s channel. A negative score means that the vendor’s channel does not tend to sell this category of product. On contrary a positive score means that the vendor’s channel tends to sell this product category. 0% indicates either a lack of data to realize the comparison, either that all partners sell this category of product.

Comparison by Main categories of products

- **Brand3** shows a strong opposition vs. all other brands being below the average for IT systems and network and telecom products.
- **Brand4, Brand7 and Brand2** strongly outweigh the market for partners reselling services (+194%; +186% and +176% respectively).
By Digital Home products

Chart 23. Brands dataset comparison – between partners’ product main categories and sub category of digital home products sold – Variation of % partners reselling this product type vs. the main dataset.

Graph info: This graphic shows the product ranges associated with a vendor’s channel. A negative score means that the vendor’s channel does not tend to sell this category of product. On contrary a positive score means that the vendor’s channel tends to sell this product category. 0% indicates either a lack of data to realize the comparison, either that all partners sell this category of product.

- Almost all the brands’ partners tend to sell digital home products.
- Brand4 and Brand2 also show a difference vs. other brands outweighing the market for entertainment products.
- Brand5 and Brand3 partners show a strong opposition by being situated below the market average for DVD drivers and big sized screens.
**By Mobility products**

**Chart 2A. Brands dataset comparison – between partners’ product main categories and sub category of mobility products sold – Variation of % partners reselling this product type vs. the main dataset.**

**Graph info:** This graphic shows the product ranges associated with a vendor’s channel. A negative score means that the vendor’s channel does not tend to sell this category of product. On contrary a positive score means that the vendor’s channel tends to sell this product category. 0% indicates either a lack of data to realize the comparison, either that all partners sell this category of product.

- For Navigation products reselling/GPS, except **Brand4** outweighs the market in the first position.
- All the brands outweigh the market for wireless LAN products, accessories, navigation products and mobile phones and smartphones.
By Office automation products

Chart 25. Brands dataset comparison – between partners’ product main categories and sub category of Office automation products – Variation of % partners reselling this product type vs. the main dataset.

Graph info: This graphic shows the product ranges associated with a vendor’s channel. A negative score means that the vendor’s channel does not tend to sell this category of product. On contrary a positive score means that the vendor’s channel tends to sell this product category. 0% indicates either a lack of data to realize the comparison, either that all partners sell this category of product.

- For the peripherals and components, as well as for consumables and photocopiers, all the brands slightly outweigh the market.
- Regarding the EPOS reselling, Brand6 outweighs the market more than the other brands.
By Software products sold

**Comparison by Software products sold:**

- For software **Brand6** and **Brand7** outweigh the market especially for development software, CRM-SFA Office software and CAD software.
- All the brands show a strong opposition vs. the main dataset market trend as they lack of presence on the vertical software market.

**Chart 26. Brands dataset comparison – between partners’ Software products sold – Variation of % selling product vs. Main Dataset.**

**Graph Info:** This graphic shows the product ranges associated with a vendor’s channel. A negative score means that the vendor’s channel does not tend to sell this category of product. On contrary a positive score means that the vendor’s channel tends to sell this product category. 0% indicates either a lack of data to realize the comparison, either that all partners sell this category of product.
By Network & telecoms products

Chart 27. Brands dataset comparison – between partners’ product main categories and sub category of network and telecoms products sold – Variation of % partners reselling this product type vs. Main Dataset.

Graph info: This graphic shows the product ranges associated with a vendor’s channel. A negative score means that the vendor’s channel does not tend to sell this category of product. On contrary, a positive score means that the vendor’s channel tends to sell this product category. 0% indicates either a lack of data to realize the comparison, either that all partners sell this category of product.

- **Brand6** shows a difference vs. other brands being below the market average for firewall software reselling, network administration and remote access server categories.
- **Brand3** shows some particularities for the network and telecom products as it situated below the market average for almost all the categories.
By Peripherals & components

Chart 28. Brands dataset comparison – between partners’ product main categories and sub category of peripherals sold – Variation of % partners reselling this product type vs. the main dataset.

Graph info: This graphic shows the product ranges associated with a vendor’s channel. A negative score means that the vendor’s channel does not tend to sell this category of product. On contrary a positive score means that the vendor’s channel tends to sell this product category. 0% indicates either a lack of data to realize the comparison, either that all partners sell this category of product.

- **Brand3** shows a difference vs. other brands being below the market average for plotters, server storages and Ram reselling categories.
- All brands except for **Brand3** outweigh the market for almost all categories of peripherals and components.
- For video projectors reselling, all the brands strongly outweigh the market.
By IT Systems resold

Variation: Comparison between datasets IT Systems and the main dataset

Chart 29. Brands dataset comparison – between partners' Systems products sold – Variation of % selling product vs. the main dataset.

Graph info: This graphic shows the product ranges associated with a vendor’s channel. A negative score means that the vendor’s channel does not tend to sell this category of product. On contrary a positive score means that the vendor’s channel tends to sell this product category. 0% indicates either a lack of data to realize the comparison, either that all partners sell this category of product.

Comparison by Systems resold:

- For the systems category, Brand6 shows a strong presence on the market vs. all the other brands outweighing the market for mainframes and NC, light terminal reselling, easy PC and thin clients.
- Brand3 shows a strong opposition for most of the IT systems categories reselling, being below the market selling trend.
A company can have multiple service sub-activities:

- **vs. partner’s service activities**

<table>
<thead>
<tr>
<th>Services activities</th>
<th>Res. UPS</th>
<th>Brand1</th>
<th>Brand1 / Res. UPS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GERMANY</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services: Type of Services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Software development ...</td>
<td>1331</td>
<td>74%</td>
<td>198</td>
</tr>
<tr>
<td>IT Audits/Consultancy ...</td>
<td>1452</td>
<td>80%</td>
<td>220</td>
</tr>
<tr>
<td>Facilities Management ...</td>
<td>229</td>
<td>13%</td>
<td>74</td>
</tr>
<tr>
<td>Other IT services ...</td>
<td>1404</td>
<td>78%</td>
<td>217</td>
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<tr>
<td>Telecom &amp; Internet service companies ...</td>
<td>1227</td>
<td>68%</td>
<td>154</td>
</tr>
<tr>
<td>Personnel related service ...</td>
<td>745</td>
<td>41%</td>
<td>96</td>
</tr>
<tr>
<td>Hosting ...</td>
<td>747</td>
<td>41%</td>
<td>42</td>
</tr>
<tr>
<td>Hardware maintenance ...</td>
<td>1374</td>
<td>78%</td>
<td>204</td>
</tr>
<tr>
<td>Associations - Unions ...</td>
<td>1</td>
<td>0%</td>
<td>0</td>
</tr>
<tr>
<td>Press ...</td>
<td>0</td>
<td>0%</td>
<td>0</td>
</tr>
<tr>
<td>Other for IT business...</td>
<td>30</td>
<td>2%</td>
<td>5</td>
</tr>
<tr>
<td>Total Services</td>
<td>1805</td>
<td>0%</td>
<td>325</td>
</tr>
</tbody>
</table>

- Within the services sub-activities, IT Audits/Consultancy and other IT services (including installation) are the best represented sub-activities. Respectively 80% and 78% of partners declared to operate and to maintain these activities.

- IT Audits/Consultancy and other IT services are also the most represented activities within the **Brand1** distribution channel.
Chart 30. Brands dataset comparison - by split of revenue – origin of revenue by Services activities. 100% = Total Revenue for the company.

Graph info: This graph shows differences between datasets by structure of revenue for the service activity. 100% represents the total revenue; the other non present splits are revenues not originating from service.

Revenues from services:

- Revenues from consulting and publishing/development for Brand1 partners are measured below the market.
- Brand7 outweighs the market for equipment maintenances.

Note: Brand3 and Brand6 lack of data for the services revenues and therefore no estimation can be performed.
### Demographic data

#### GERMANY

<table>
<thead>
<tr>
<th>Sales Target</th>
<th>Res. UPS</th>
<th>Brand1</th>
<th>Brand1 / Res. UPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individuals</td>
<td>911</td>
<td>418</td>
<td>+0%</td>
</tr>
<tr>
<td>SoHo - Small Office Home Office (&lt; 10 empl.)</td>
<td>670</td>
<td>292</td>
<td>+77%</td>
</tr>
<tr>
<td>Small firms (10-50 empl.)</td>
<td>2114</td>
<td>438</td>
<td>-15%</td>
</tr>
<tr>
<td>Medium size firms (50-250 empl.)</td>
<td>2325</td>
<td>486</td>
<td>-15%</td>
</tr>
<tr>
<td>Medium to Large firms (250-500 empl.)</td>
<td>2285</td>
<td>474</td>
<td>+15%</td>
</tr>
<tr>
<td>Large firms (500-2500 empl.)</td>
<td>687</td>
<td>221</td>
<td>+33%</td>
</tr>
<tr>
<td>Corporations (&gt;2500 empl.)</td>
<td>654</td>
<td>221</td>
<td>+33%</td>
</tr>
<tr>
<td>Administration</td>
<td>377</td>
<td>142</td>
<td>+53%</td>
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</tbody>
</table>

**Table 31. Comparison between the partner sales’ targets – Volume of partners addressing a client category. One partner can address various targets. 100% = total number of partners.**

#### Brand position vs. type of market (vs. market):

<table>
<thead>
<tr>
<th></th>
<th>Brand1</th>
<th>Brand2</th>
<th>Brand3</th>
<th>Brand4</th>
<th>Brand5</th>
<th>Brand6</th>
<th>Brand7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individuals</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
</tr>
<tr>
<td>SoHo - Small Office Home Office (&lt; 10 empl.)</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
</tr>
<tr>
<td>Small firms (10-50 empl.)</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
</tr>
<tr>
<td>Medium size firms (50-250 empl.)</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
</tr>
<tr>
<td>Medium to Large firms (250-500 empl.)</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
</tr>
<tr>
<td>Large firms (500-2500 empl.)</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
</tr>
<tr>
<td>Corporations (&gt;2500 empl.)</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
</tr>
<tr>
<td>Administration</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
<td>🍔</td>
</tr>
</tbody>
</table>

**Table 32. Comparison between the partner sales’ targets – Each brand category is compared to the main market. Green means stronger than the main market, Orange, within average, Red lower.**

**Brand1 partners are:**

- **Less focused** on the following markets:
  - Small and medium businesses
  - Individuals

- **Averaging** on the following markets:
  - Large firms
  - Corporations

- **Strongly oriented** towards the following markets:
  - SOHO
  - Public administration
Detailed comparison on the Sales Target:

Chart 33. Brand’s dataset comparison between partner’s targets of sales - Variation of % of partners addressing a client category vs. Main Dataset.

Graph info: This graph shows differences between datasets vs. the main dataset, the main dataset is represented by the line 0%. A positive variation indicates that the corresponding dataset outweighs the market average. A negative variation indicates that the corresponding dataset is beneath the market average.

Home Consumer, SOHO and very small firms:
- All brands channel partners outweigh the average for these targets, except for Brand6 for the individuals’ target.
- Brand3 and Brand2 channel partners are the most present on these markets.
- Brand1 is also very present on the SOHO market.

SMB:
- The majority of brands are below the market average for this category.
- Brand6 is above the market average for the medium-sized firms.

Large Accounts:
- All brands’ partners except for Brand3 outweigh the market.
- Brand6 and Brand7 are on top positions, Brand1 is the lowest.

Public and Local Authorities:
- All brands’ partners outweigh the market.
- Brand4 and Brand7 are on top positions.
Chart 34. Brand’s dataset comparison between partner’s revenue origins.

Graph info: This graph shows differences between datasets by structure of revenue. 100% represents the total revenue. The statistic has been done excluding companies realising more than 100M€ (i.e. Mass Market). The total revenue is calculated as the sum of all declared splits of revenue by client target. The percentage is calculated by comparison of revenue of corresponding revenue to the total revenue. The #1 position belongs to the main dataset.

Client Target revenues:

- **88% of revenues** taken from the main dataset or printer products are generated from Businesses.
- **Brand3** resellers hold the highest position for revenue originating from the consumer market. **Brand6** and **Brand4** resellers hold the highest position for revenue originating from the enterprise business market.
Chart 35. Brand’s dataset comparison between partner’s revenue origins (BtoB) 100% = total revenue.

Graph info: This graph shows differences between datasets by structure of revenue for the revenue originated from the B to B activity. 100% represents the total revenue, the other non present splits are revenues not originated from B to B.

**Enterprise revenues:**

- **Brand1** partners generate the majority of their revenue income from SMB and government bodies.
- **Brand1** partners are performing slightly below the market average within the SMB targeted market.
- **Brand6** partners’ revenues are the most important for the SMB business segment.
- **Brand2** and **Brand4** partners generate a revenue income from large account customers superior to the other brands’ partners.
- **All brands’** partners generate revenues from public administration superior to the market’s average.
vs. client’s target categories (area of sale) and country origin of partners:

**Sales Area:**

- **Brand1** has the highest ratio of partners covering regional sales areas.
- **Brand2** and **Brand1** have the highest average of maintaining partners who are active within a local sales area.
- **Brand4** and **Brand5** have the highest average of maintaining partners who are active within a national sales area.
- **Brand6** and **Brand7** have the highest average of partners covering national and international sales areas.

**Graph Info:** This graph shows differences between datasets by area of sales. A company may address several areas. This graph explains how local a channel is. Typically, the more local a channel is, the more it addresses the SMB or the end user market.
vs. partners client’s market (vertical market) findings

Categories associated with:
- Services activity are marked in purple;
- Industry activities are in red,
- Public Authorities & Government bodies are in blue,
- Primary sector activities are in green.

Comments on Partner’s vertical markets:
- **Brand1** has and maintains a better coverage of partners who are addressing services businesses, 9 out of 18 of the top markets addressed by **Brand1** reseller are originating from this segment.

- However, the weakest markets are within partner areas covering also the services market; 8 out of 9, in lowest position are from services.

- The Top 3 vertical markets in which **Brand1** holds the strongest positions are Fishing, Naval Industry and Raw Materials Extraction.

**Note:** Even if Fishing, Naval Industry and Raw Materials Extraction come in first places in terms of vertical coverage in percentage, in terms of volume, the sectors are not representative (below 20).

**Brand1 Strong Market Position:**

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fishing</td>
<td>+257%</td>
</tr>
<tr>
<td>Naval Industry</td>
<td>+129%</td>
</tr>
<tr>
<td>Raw Materials Extraction</td>
<td>+114%</td>
</tr>
<tr>
<td>Distribution - retail</td>
<td>+108%</td>
</tr>
<tr>
<td>Services (Miscellaneous)</td>
<td>+104%</td>
</tr>
<tr>
<td>Military</td>
<td>+86%</td>
</tr>
<tr>
<td>Local Authority</td>
<td>+79%</td>
</tr>
<tr>
<td>Heavy Industry</td>
<td>+78%</td>
</tr>
<tr>
<td>Banking - Finance</td>
<td>+76%</td>
</tr>
<tr>
<td>Legal</td>
<td>+66%</td>
</tr>
<tr>
<td>Building - Architecture - Public W</td>
<td>+64%</td>
</tr>
<tr>
<td>Property Management</td>
<td>+63%</td>
</tr>
<tr>
<td>Logistics</td>
<td>+61%</td>
</tr>
<tr>
<td>Pharmaceutical</td>
<td>+61%</td>
</tr>
<tr>
<td>Industrial Machinery</td>
<td>+61%</td>
</tr>
<tr>
<td>Research and Scientific</td>
<td>+60%</td>
</tr>
<tr>
<td>Associations</td>
<td>+60%</td>
</tr>
<tr>
<td>Chemicals - Oil</td>
<td>+60%</td>
</tr>
</tbody>
</table>
### Brand1 Medium Market Position:

<table>
<thead>
<tr>
<th>Category</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial Equipment</td>
<td>+58%</td>
</tr>
<tr>
<td>Textile</td>
<td>+58%</td>
</tr>
<tr>
<td>Aeronautics</td>
<td>+57%</td>
</tr>
<tr>
<td>Transport</td>
<td>+57%</td>
</tr>
<tr>
<td>Government Bodies</td>
<td>+56%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>+55%</td>
</tr>
<tr>
<td>Insurance</td>
<td>+54%</td>
</tr>
<tr>
<td>Automobile</td>
<td>+54%</td>
</tr>
<tr>
<td>Metallurgy</td>
<td>+50%</td>
</tr>
<tr>
<td>Advertising / PR Media</td>
<td>+47%</td>
</tr>
<tr>
<td>Power</td>
<td>+45%</td>
</tr>
<tr>
<td>Electronics</td>
<td>+43%</td>
</tr>
<tr>
<td>Education / Training</td>
<td>+42%</td>
</tr>
<tr>
<td>Publishing - Printing - PrePress</td>
<td>+40%</td>
</tr>
</tbody>
</table>

### Brand1 Weaker Market Position:

<table>
<thead>
<tr>
<th>Category</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels and Restaurants</td>
<td>+37%</td>
</tr>
<tr>
<td>Leisure Industry</td>
<td>+37%</td>
</tr>
<tr>
<td>Medical - Health</td>
<td>+33%</td>
</tr>
<tr>
<td>Food</td>
<td>+30%</td>
</tr>
<tr>
<td>Security</td>
<td>+29%</td>
</tr>
<tr>
<td>Tourism</td>
<td>+29%</td>
</tr>
<tr>
<td>Press- TV - Cinema</td>
<td>+15%</td>
</tr>
<tr>
<td>Telecoms</td>
<td>+14%</td>
</tr>
<tr>
<td>IT Industry</td>
<td>-38%</td>
</tr>
</tbody>
</table>
Chart 37. This graph and the following ones show the differences of market penetration between the different datasets in comparing partners who have declared to address a specific market.
Chart 38. Brands dataset comparison - by split of revenue – Market’s origin of revenue.

Graph info: This graph shows differences between datasets by structure of revenue. 100% represents the total revenue. The statistic has been performed excluding companies realising more than 100M€. The total revenue is calculated by the sum of all declared split of revenue by client market target, the percentage is calculated by comparison of revenue of corresponding revenue to the total revenue. The #1 position is represented by the main dataset.

Note: Due to the relative low numbers of data collected on TO, this chart might contain some imprecision.

Market Revenues:

- Revenue origins are underlining that Brand1 operates rather similarly to the market regarding the revenue from the primary sector.
- Brand7 is #1 for partners generating strong revenues from the services industry.
- Brand1 is also #1 for partners generating strong revenues from the clients working in the public sector.

Note: There is not enough information in order to be able to estimate Brand6’s revenues by sectors.
Chart 39. Brands dataset comparison - by split of revenue -origin of revenue for the Service Market

Graph info: This graph shows differences between datasets by structure of revenue originated from B to B service markets. 100% represents the total revenue; the other non present splits are revenues not B to B service’s markets originated.

Note: Due to the relative low numbers of data collected on TO, this chart might contain some imprecision.

Enterprises services market:

- Other services followed by distribution services indicate to be the two first enterprise services targeted by these categories of channel partners.
- Brand2 appears to be the closest brand to the market.
- Brand7 partners come on top for Telecoms companies.
- Brand7 is also strong for other services.

Note: There is not enough information in order to be able to estimate Brand6’s and Brand3’s revenues by sectors.
**vs. partner sales methods**

**Chart 40: Brand’s dataset comparison between partner’s methods of sale - Variation of % of partners using a method vs. Main Dataset.**

Graph info: This graph shows differences between datasets vs. the main dataset, the main dataset is represented by the line 0%. A positive variation indicates that the corresponding dataset outweighs the market average, a negative variation indicates that the corresponding dataset underweights the market average.

**Sales methods:**

- **Telesales Sales**: most of the brands’ partners are using this method in the average of the market.

- **Field Sales**: only some of the brands’ partners are using this method in average of the market. Brand1, Brand3 and Brand5 seem to be slightly below the market average for resellers using this sales method.

- **Selling by catalogue**: The use of this method is quite common for this type of market. Brand3 comes on top of outweighing the market.

- **Sales through e-mailing**: All channel partners slightly outweigh the market for e-mailing as a method of sales; Brand2 and Brand4 are very strong with this sales method.

- **Selling from a shop**: This sales method is not so common in this field. However, Brand3 and Brand1 come on top positions and outweigh the market.

- **On-Line Commerce**: The use of this method is also unanimous in this field Brand3 comes on top position of outweighing the market.

- **By ASP model**: Only Brand5 is situated above the market average for this sales method.
Brand1 Strong Position (in coverage > 0%)

- Brand1 channel partners top 3 competencies are: Executive Information Systems, Application Server and Storage Area Network.
- Brand1 channel partners ‘lowest’ 3 skills are: Voip, Internet/Intranet and Software Engineering.

<table>
<thead>
<tr>
<th>Skill</th>
<th>Coverage %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Information Systems - EIS</td>
<td>+152%</td>
</tr>
<tr>
<td>Application Server</td>
<td>+80%</td>
</tr>
<tr>
<td>SAN - Storage Area Network</td>
<td>+73%</td>
</tr>
<tr>
<td>E-Commerce</td>
<td>+67%</td>
</tr>
<tr>
<td>NAS</td>
<td>+65%</td>
</tr>
<tr>
<td>Computer-Aided Drawing</td>
<td>+55%</td>
</tr>
<tr>
<td>ERP</td>
<td>+52%</td>
</tr>
<tr>
<td>Video and video conferencing</td>
<td>+48%</td>
</tr>
<tr>
<td>Groupware</td>
<td>+46%</td>
</tr>
<tr>
<td>WAN Networks</td>
<td>+45%</td>
</tr>
<tr>
<td>Personnel Management</td>
<td>+43%</td>
</tr>
<tr>
<td>SCM - Supply Chain Management</td>
<td>+42%</td>
</tr>
<tr>
<td>Mobile Computing</td>
<td>+40%</td>
</tr>
<tr>
<td>Network Security</td>
<td>+39%</td>
</tr>
<tr>
<td>LAN - Networks</td>
<td>+38%</td>
</tr>
<tr>
<td>CAPM - Production Management</td>
<td>+36%</td>
</tr>
<tr>
<td>CAMM - Management And Maintenance</td>
<td>+35%</td>
</tr>
</tbody>
</table>

Brand1 Medium Position

<table>
<thead>
<tr>
<th>Skill</th>
<th>Coverage %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Software configuration</td>
<td>+34%</td>
</tr>
<tr>
<td>Accounting - Management</td>
<td>+33%</td>
</tr>
<tr>
<td>Datawarehouse</td>
<td>+31%</td>
</tr>
<tr>
<td>Help Desk</td>
<td>+30%</td>
</tr>
<tr>
<td>CAD</td>
<td>+26%</td>
</tr>
<tr>
<td>Client - Server</td>
<td>+25%</td>
</tr>
<tr>
<td>Quality control</td>
<td>+22%</td>
</tr>
<tr>
<td>Wireless local networks (WLAN)</td>
<td>+22%</td>
</tr>
<tr>
<td>Electronic Bulletin Board</td>
<td>+20%</td>
</tr>
<tr>
<td>EDM - Electronic Data Management</td>
<td>+20%</td>
</tr>
<tr>
<td>EDI - Electronic Data Interchange</td>
<td>+18%</td>
</tr>
</tbody>
</table>
### Brand1 Weak Position

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>WAP - mobile telephone - PDA</td>
<td>+13%</td>
</tr>
<tr>
<td>Commercial Management / Sales - CRM - SFA</td>
<td>+13%</td>
</tr>
<tr>
<td>CAD/CAM</td>
<td>+12%</td>
</tr>
<tr>
<td>Geography - Cartography - GIS</td>
<td>+11%</td>
</tr>
<tr>
<td>Marketing Management</td>
<td>+11%</td>
</tr>
<tr>
<td>LAN PBX</td>
<td>+6%</td>
</tr>
<tr>
<td>Multimedia</td>
<td>+6%</td>
</tr>
<tr>
<td>CTI - Call Centers - Voice and Data</td>
<td>+1%</td>
</tr>
<tr>
<td>VoIP - Voice over IP (new)</td>
<td>-5%</td>
</tr>
<tr>
<td>Internet - Intranet</td>
<td>-14%</td>
</tr>
<tr>
<td>Software Engineering</td>
<td>-46%</td>
</tr>
</tbody>
</table>
Chart 41. This graphic and the following show the differences of market penetration between the different datasets, by comparing partners who have declared to have a specific technical skill.
Chart 42. Brands dataset comparison - by split of revenue – origin of revenue by OS platform.

**Graph info:** This graph shows differences between datasets by structure of revenue. 100% represents the total revenue. The statistic has been realised excluding companies realising more than 100M€. The total revenue is calculated by the sum of all declared split of revenue by OS platforms, the percentage is calculated by comparison of revenue of corresponding revenue to the total revenue.

The market is represented by the main dataset in the #1 position.

**Note:** Due to the relative low numbers of data collected on TO, this chart might include some imprecision.

**OS platform revenues**

- For all network resellers, Microsoft Windows represents 81% of their revenue income.
- LINUX/UNIX comes second (9%), followed by MAC OS (7%) and proprietary OS (4%).
- Brand1 channel partners splits is rather similar with the average, with a 10% share for MAC OS and 5% UNIX and LINUX and only 2% for proprietary OS.
- Partners oriented more towards the industry like Brand4 and Brand5 channel partners hold the strongest position for revenues from UNIX and LINUX platforms.
- Brand1 channel network generates 10% of their revenue income from MAC OS, taking the biggest share coming from this platform.

**Note:** There is not enough information in order to be able to estimate Brand6’s revenues.
vs. partner’s other brand channel findings

We have compared the volume of partners declaring to resale a brand for a dataset. This volume is expressed in percentage.

Then we have compared this percentage to the percentage of the main dataset. If the dataset’s percentage is above the main dataset’s percentage it means that the brand is more present in the corresponding dataset than in the market represented by the main dataset.

It is important to know the overlap in order to detect the competitors you have within your own channel. Competition within a market is the second reason to lose a sale. To win a sale you need your partner to present your brand to the client.

The first table explains the number of partners and overlap. The second compares each number with the total by brand.

<table>
<thead>
<tr>
<th>Brand</th>
<th>Brand1</th>
<th>Brand2</th>
<th>Brand3</th>
<th>Brand4</th>
<th>Brand5</th>
<th>Brand6</th>
<th>Brand7</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand1</td>
<td>661</td>
<td>130</td>
<td>115</td>
<td>101</td>
<td>371</td>
<td>65</td>
<td>100</td>
<td>661</td>
</tr>
<tr>
<td>Brand2</td>
<td>120</td>
<td>191</td>
<td>26</td>
<td>85</td>
<td>148</td>
<td>55</td>
<td>63</td>
<td>191</td>
</tr>
<tr>
<td>Brand3</td>
<td>115</td>
<td>25</td>
<td>163</td>
<td>11</td>
<td>103</td>
<td>12</td>
<td>26</td>
<td>163</td>
</tr>
<tr>
<td>Brand4</td>
<td>101</td>
<td>85</td>
<td>11</td>
<td>165</td>
<td>123</td>
<td>48</td>
<td>59</td>
<td>165</td>
</tr>
<tr>
<td>Brand5</td>
<td>371</td>
<td>148</td>
<td>102</td>
<td>123</td>
<td>941</td>
<td>75</td>
<td>103</td>
<td>641</td>
</tr>
<tr>
<td>Brand6</td>
<td>60</td>
<td>56</td>
<td>12</td>
<td>40</td>
<td>79</td>
<td>94</td>
<td>60</td>
<td>94</td>
</tr>
<tr>
<td>Brand7</td>
<td>160</td>
<td>93</td>
<td>26</td>
<td>59</td>
<td>103</td>
<td>60</td>
<td>134</td>
<td>134</td>
</tr>
<tr>
<td>Total</td>
<td>661</td>
<td>191</td>
<td>163</td>
<td>165</td>
<td>641</td>
<td>94</td>
<td>134</td>
<td>2714</td>
</tr>
</tbody>
</table>

**Analysis:**

Overall, Brand7 and Brand3 have a high overlap in percentage compared to Brand1 and should be considered as strong Challengers for Brand1’s channel. In terms of volume, Brand1’s main competitor tends to be Brand5, followed by Brand2 and Brand3.
- **Volumetric by main activity (Main dataset)**

An entity could be present in only one main activity

<table>
<thead>
<tr>
<th>Activity according main activity - comuBase</th>
<th>Volume</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturer</td>
<td>13</td>
<td>0%</td>
</tr>
<tr>
<td>Software publisher</td>
<td>14</td>
<td>1%</td>
</tr>
<tr>
<td>Publisher of software for a specific activity</td>
<td>24</td>
<td>1%</td>
</tr>
<tr>
<td>Publisher of software for a specific process of companies</td>
<td>21</td>
<td>1%</td>
</tr>
<tr>
<td>Software solutions integrator (developed by third parties)</td>
<td>24</td>
<td>1%</td>
</tr>
<tr>
<td>IT services, Software development (hosting, maintenance, training, bespoke software development...)</td>
<td>1095</td>
<td>40%</td>
</tr>
<tr>
<td>Telecom services (Telecom operator, ISP...)</td>
<td>11</td>
<td>0%</td>
</tr>
<tr>
<td>Telecom &amp; network infrastructure integrator</td>
<td>15</td>
<td>1%</td>
</tr>
<tr>
<td>IT infrastructure integrator</td>
<td>34</td>
<td>1%</td>
</tr>
<tr>
<td>Consulting</td>
<td>7</td>
<td>0%</td>
</tr>
<tr>
<td>Reselling to individuals</td>
<td>389</td>
<td>14%</td>
</tr>
<tr>
<td>Reselling to enterprises (hardware, software &amp; services &amp; assemblers)</td>
<td>997</td>
<td>37%</td>
</tr>
<tr>
<td>Wholesaler (resale of IT and Telecom products to resellers)</td>
<td>61</td>
<td>2%</td>
</tr>
<tr>
<td>Large Assembling company</td>
<td>2</td>
<td>0%</td>
</tr>
<tr>
<td>Total Main Activity (a company has only one activity)</td>
<td>2707</td>
<td>100%</td>
</tr>
</tbody>
</table>
An entity could be present in many sub activities of Resale:

<table>
<thead>
<tr>
<th>Resale: Type of Resale</th>
<th>Germany</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resale</td>
<td>2386</td>
<td>90%</td>
</tr>
<tr>
<td>IT reseller</td>
<td>2294</td>
<td>87%</td>
</tr>
<tr>
<td>Independent IT resellers</td>
<td>1621</td>
<td>61%</td>
</tr>
<tr>
<td>IT reseller chains</td>
<td>204</td>
<td>8%</td>
</tr>
<tr>
<td>IT group resellers</td>
<td>37</td>
<td>1%</td>
</tr>
<tr>
<td>Exclusive brand dealers</td>
<td>17</td>
<td>1%</td>
</tr>
<tr>
<td>Assembler resellers</td>
<td>274</td>
<td>10%</td>
</tr>
<tr>
<td>Software only resellers</td>
<td>12</td>
<td>0%</td>
</tr>
<tr>
<td>On-request reselling</td>
<td>353</td>
<td>13%</td>
</tr>
<tr>
<td>Office automation resellers</td>
<td>221</td>
<td>8%</td>
</tr>
<tr>
<td>Resale on web</td>
<td>198</td>
<td>8%</td>
</tr>
<tr>
<td>Other resellers</td>
<td>189</td>
<td>7%</td>
</tr>
<tr>
<td>Centres</td>
<td>49</td>
<td>2%</td>
</tr>
<tr>
<td>Distributors</td>
<td>130</td>
<td>5%</td>
</tr>
<tr>
<td>Mass distribution</td>
<td>194</td>
<td>7%</td>
</tr>
<tr>
<td>Mail order and catalogues</td>
<td>148</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>34</td>
<td>1%</td>
</tr>
</tbody>
</table>

An entity could be present in many sub activities of Software publishing:

<table>
<thead>
<tr>
<th>Publisher: Type of software</th>
<th>Germany</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office Automation and DBMS Software</td>
<td>47</td>
<td>24%</td>
</tr>
<tr>
<td>Office utilities</td>
<td>9</td>
<td>5%</td>
</tr>
<tr>
<td>Specialising in a specific sector</td>
<td>98</td>
<td>51%</td>
</tr>
<tr>
<td>Electronics industry</td>
<td>6</td>
<td>3%</td>
</tr>
<tr>
<td>Systems</td>
<td>27</td>
<td>14%</td>
</tr>
<tr>
<td>for networks and telecom</td>
<td>36</td>
<td>19%</td>
</tr>
<tr>
<td>management and production</td>
<td>102</td>
<td>53%</td>
</tr>
<tr>
<td>image and sound processing</td>
<td>11</td>
<td>6%</td>
</tr>
<tr>
<td>Scientific</td>
<td>5</td>
<td>3%</td>
</tr>
<tr>
<td>Training - Teaching</td>
<td>13</td>
<td>7%</td>
</tr>
<tr>
<td>Games and entertainment</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>For the family</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>Miscellaneous Software</td>
<td>4</td>
<td>2%</td>
</tr>
<tr>
<td>Total Software activities</td>
<td>192</td>
<td>0%</td>
</tr>
</tbody>
</table>
Definitions

Main activity Definitions:

ICT Manufacturer
Company whose activity is concentrated on manufacturing or exclusive representation of a manufacturer

Major Assembler
Company whose activity is centred on assembling and who does not sell directly to companies or to the final user

ISV dedicated to a company process
Software publisher who develops in house software responding to generic company needs (i.e. accounting software, networking software, CRM software...)

ISV dedicated to a specific business
Software publisher who develops software in house, responding to a specific industry or activity need (i.e. Cathia for CAO industry)

Software publisher (other)
Software companies who develop in house software, responding to general use of a company (i.e. Linguistic tools, Word-processing, Antivirus)

Telecom & Network systems integrator
Services company managing partly or globally, the integration of hardware and software dedicated to telecom usage

IT systems integrator
Service Company managing partly, or globally the integration of hardware and software for IT dedicated purposes

Software solution integrator
Service Company dedicated to study, evaluate and deploy software solution developed by other software publisher into their clients’ architecture

Consulting
Service Company dedicated to study and advising companies about the deployment and process linked to IT or Telecom matters

IT services (maintenances, training, on request development...)
Services Company dedicated in subcontracting or outsourcing IT needs

Telecom services
Services Company dedicated in subcontracting or outsourcing Telecom needs
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**Distributors**
Company dedicated to purchase and resale products to other IT companies

**Resale to companies (assemblers, hardware, software, services...)**
Company dedicated to purchase and resale ICT products to end user companies

**Resale to home users**
Company dedicated to purchase and resale ICT products to final end user

**Other activity dedicated to ICT industry**
Other type of companies where activities are dedicated to the ICT industry

- **Secondary and important activities definitions**

**Mass Market**
Retail companies such as superstore, department store, hypermarket, multi specialist, IT superstore..., and their corresponding purchase centre.

**Independent reseller**
Company which resale ICT products to consumers or enterprises targets.

**IT group reseller**
Independent Company reselling ICT products to consumers or enterprises targets and belonging to a group of independent dealers who have chosen to purchase centrally through a purchase centre.

**IT chain reseller**
Outlet issued from a centralised company. The main entity is in charge of branding, purchasing.

**ISV**
For Independent Software Vendor, companies which develop locally software. These companies usually address vertical market or dedicate their activity towards a specific process.

**Vars**
For Value Added Reseller, companies which have a resale activities and an important service activities (usually set up to 40% of its business). With the fall of margin in the pure resale activities, most of B-to-B independent resellers could now be considered as Vars.

**Vendors**
This term includes manufacturer or company, which represents a Manufacturer and the large Software Companies and their local representation such as Microsoft, Oracle, and Symantec...
**Distributor**

A distributor addresses only the ICT specialist resellers. The equivalent is wholesaler. The sub categories of distributor include Broad-liner and VAD or Master Var.

**Distributor: Broad-liner**

A Broad-liner address ICT reseller with a large catalogue of products, those products usually do not require advanced support to be sold.

**Distributor: VAD or Master Var**

A Value Added Distributor address ICT reseller with a specialised catalogue of products, usually those products requires advanced support to be sold.
About compuBase:

*compuBase* - The Leading European Channel Intelligence Company
More than fifteen years of expertise dedicated to the ICT channel industry

compuBase is a leading provider of marketing expertise in the European IT channel industry. Based on our database analysis and consulting, we deliver value added on the European ICT Channel:

- Consulting and business development
- Business Intelligence & Database Knowledge in the IT industry
- Data organisation, ROI on database*

compuBase natural’s future is to expand its activities in EMEA and then worldwide.

We offer vendors a wide range of services to help them manage and develop their ICT channel with the following operations:

- Channel survey
- Channel Ranking / Scoring
- Channel data cleaning and enrichment
- Channel data management (Sell out reports management)
- Channel targeting support and consulting
- Direct Marketing support (Emailing routing)
- On line access to channel databases
- Web Partner locator
- Web Solution locator
- Web Partner registration forms

The *compuBase* information database covers 4 main ICT activities: manufacturers, software publishers, service providers and resellers.

The *compuBase* coverage includes: IT, Telecom and Home Digital businesses.

It includes more than 115,000 company profiles in 24 countries.

Our clients may choose the ideal solution according their own structure to access to *compuBase* data. Targets, depth, access solution and services are adapted to the client requirements.

Among our clients, we are proud to work with: TOSHIBA, IBM, CISCO, BRAND3, Oracle, Epson, TechData, Microsoft, Sharp, Cognos, Actebis, Brand2, Intel...