TD SYNNEX | Services

The Attach Imperative

Why attaching services to product sales is the defining revenue strategy for IT channel partners in Europe.

TD SYNNEX

Table Of Contents

Table Of Contents 2
EXECUTIVE SUMMARY 3
The case for services ‘attach’ 3
Demand drivers: why customers need services now 4
Artificial intelligence: from hype to implementation 4
Cybersecurity: the always-on attach driver 4
Complexity as a services catalyst 4
The Partner business case: three strategic arguments 5
1. Services grow faster and more predictably than products 5
2. Services attach creates margin uplift 5
3. Attach builds customer relationships that resist competitive pressure 5
TD SYNNEX Services Value Cycle 6
Pre-Deployment Services 7
Deployment Services 8
Post-Deployment Services 9
What services attach means for your business 10
1. **PROFITABILITY**: services change your margin profile permanently 10
2. **GROWTH**: attach rate is where your growth rate is set 10
3. **COMPETITIVE DIFFERENTIATION**: the service relationship is the moat 10
From transaction to relationship 11
Partner takeaways 11
Turn your next opportunity into more 12
REFERENCE 13
Analyst sources 13

EXECUTIVE SUMMARY

The case for services ‘attach’

Gartner projects that IT Services spending in Europe will outpace most other market segments. The channel partners pulling ahead of the market are those making services a deliberate part of every customer engagement — building them in from the first conversation, rather than bolting them on after the hardware deal is done, or not attaching them at all.

This white paper makes the case - grounded in primary research from the industry's leading analyst firms - that attaching services to product sales is **not a nice-to-have growth lever, but the defining strategic imperative** for IT channel partners in Europe today.

The TD SYNNEX *Services Value Cycle* provides the framework: a value cycle of **pre-deployment, deployment, and post-deployment services** that, when attached deliberately and consistently to product sales, transforms transactional revenue into **recurring, higher-margin income** with stronger customer retention.

KEY FINDINGS

1. Services are growing faster than many products — and with more margin predictability.
2. The channel controls the majority of global IT spending — within the channel, services attach rates remain low.
3. AI, cloud complexity, and cybersecurity are creating unprecedented demand for services.
4. Partners who enable services attach are rapidly becoming indispensable to their customers.

Demand drivers: why customers need services now

This demand isn't manufactured by a desire to simply sell more. It's driven by real pressure inside customer organisations - **AI adoption, cybersecurity, and rising IT complexity** - and each of those pressures maps directly to a segment of the TD SYNNEX *Services Value Cycle*.

Artificial intelligence: from hype to implementation

The AI investment cycle has entered a new phase. Following the initial wave of infrastructure investment and pilot programmes, organisations are now confronting the hard reality of implementation.

This creates direct demand across the pre-deployment and deployment service layers:

- **Technical Training & Certification** — partners must be competent and with appropriate skills, credentials, and experience to advise on AI implementation.
- **Configuration & Integration** — AI requires integration with existing infrastructure and data.
- **Professional Services** — implementation projects require project management and deep engineering expertise.
- **Managed Services** — ongoing AI operations require monitoring, optimisation, and support.

Omdia's data underlines the scale of the skills gap: 61% of channel partners report that their customers still struggle to move AI projects out of the proof-of-concept stage. This is more than a customer capability gap, it is a partner services opportunity.

Cybersecurity: the always-on attach driver

Cybersecurity continues to be a consistent driver of services across the channel. Omdia forecasts **cybersecurity managed services growing at 13%**, matching the overall managed services growth rate. CompTIA research shows **90% of MSPs expect cybersecurity managed services revenue growth** in 2025 and beyond.

The drivers are structural: the expanding attack surface from cloud adoption and remote work, increasingly sophisticated threat actors, and a growing web of regulatory compliance requirements - including NIS2 in Europe - that make cybersecurity a board-level concern rather than a technical discretionary spend.

Complexity as a services catalyst

Perhaps the most durable driver of services demand is the sheer complexity of modern IT environments. As enterprises layer cloud, AI, cybersecurity, and edge infrastructure (often across multiple vendors) the internal IT capability to manage this complexity is increasingly insufficient.

This is the context behind Business Research Insights' finding that **68% of enterprises rely on value-added resellers for integrated technology solutions**, with 57% adopting cloud and managed services specifically through the channel. Partners who build strong services practices are not just selling an add-on — they are becoming the operational backbone of their customers' IT function.

The Partner business case: three strategic arguments

1. Services grow faster and more predictably than products

The analyst consensus is consistent: **IT services outgrow hardware and software** on a sustained, structural basis.

Gartner, IDC, and Omdia all forecast services market growth at 10–13%, against overall IT growth of 7–9% and hardware growth that is subject to significant cyclical volatility.

For partners building sustainable businesses, this predictability matters as much as the growth rate. **Services revenue is plannable. Hardware revenue is not.**

2. Services attach creates margin uplift

Product margins in the IT channel are under sustained pressure. Services change the economics fundamentally.

This dynamic applies at the partner level: every attached service component increases gross margin per transaction, often dramatically.

A hardware deal with attached professional services, support, and managed services can deliver two to three times the gross profit of the hardware transaction alone.

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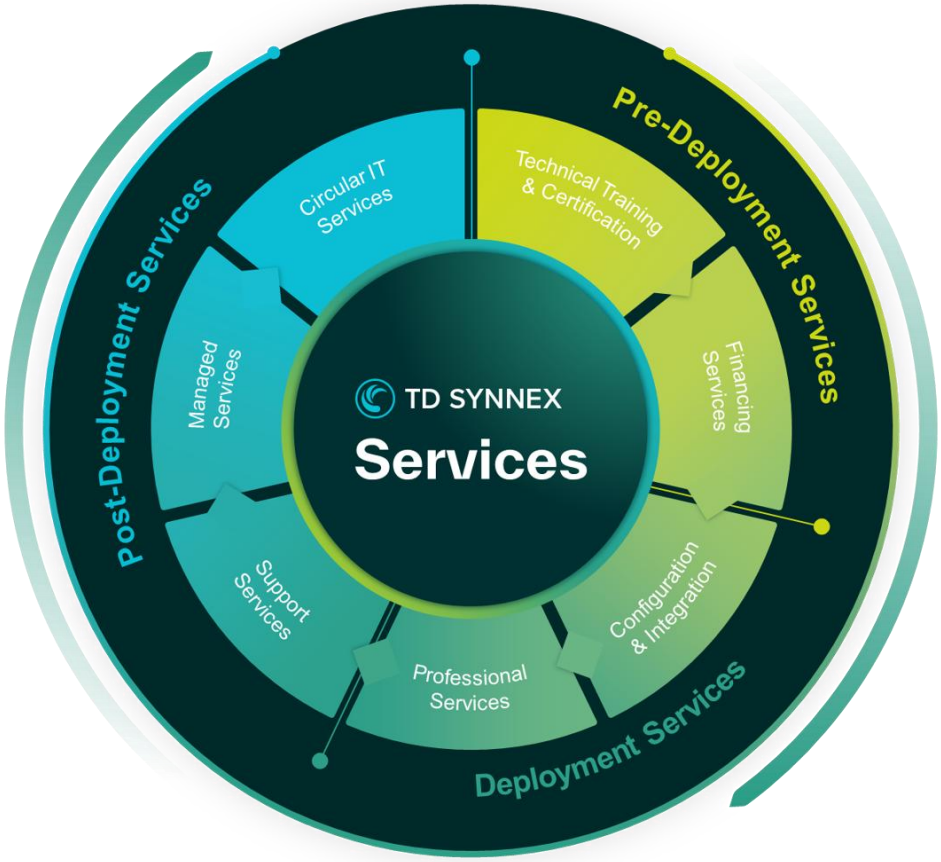
3. Attach builds customer relationships that resist competitive pressure

The commercial argument for services attach extends beyond the immediate transaction. Partners who attach services across the full lifecycle (from pre-sale training and financing through deployment and ongoing managed support) become embedded in the operational fabric of their customers' businesses. This creates switching costs and relationship depth that pure product resellers cannot match.

The customer who buys hardware, software and services from the same partner is effectively closed to competitors.

TD SYNNEX Services Value Cycle

At every stage of the IT lifecycle - pre-deployment, deployment, and post-deployment - TD SYNNEX offers tailored services that empower partners to deliver value, reduce complexity, and drive growth. The TD SYNNEX *Services Value Cycle* provides a framework for **attaching services to every product sale**.



Pre-Deployment Services

PRE-DEPLOYMENT

Technical Training & Certification

The skills bottleneck is the single biggest obstacle to successful AI and cloud implementation in European enterprises. Gartner documents **$94B in European AI services spending in 2025**, but that spending requires partner capability to capture it.

Partners who invest in technical certifications (and who leverage TD SYNNEX's training programmes to maintain those certifications) win a disproportionate share of complex, high-value implementation projects.

The attach motion: sell training alongside any AI-adjacent hardware or software transaction.



PRE-DEPLOYMENT

Financing Services

Gartner projects the public cloud services market will exceed **$1 trillion by 2027**, driven by enterprise appetite for consumption-based, opex IT models. Financing services enable this transition, converting capital expenditure barriers into manageable subscription-based contracts.

For partners, financing attach increases deal size, improves close rates on large infrastructure refresh projects, and creates a long-term financial relationship with the customer.

Make financing part of the solution — helping customers manage upfront investment, overcome budget constraints and make larger technology refreshes achievable. The attach motion: quote financing on every large infrastructure refresh.



Deployment Services

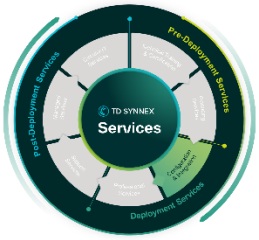
DEPLOYMENT

Configuration & Integration

CompTIA research consistently identifies IT complexity as the primary driver of channel services demand. Configuration and integration services **reduce deployment risk for customers and increase deal value for partners**.

Validated reference architectures - increasingly offered through distributor programmes - enable partners to attach configuration services at scale without proportional increases in engineering overhead.

The attach rate opportunity is highest on server, network, and security hardware transactions.



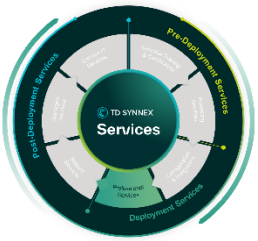
DEPLOYMENT

Professional Services

Business Research Insights data shows **68% of enterprises rely on the channel for integrated IT solutions**. Professional services (project management, architecture design, implementation) convert this reliance into billable revenue.

IDC's distribution tracker shows professional services delivering among the highest margin contributions in the services mix.

The attach motion is straightforward: no complex hardware or software deployment should be quoted without a professional services component.



Post-Deployment Services

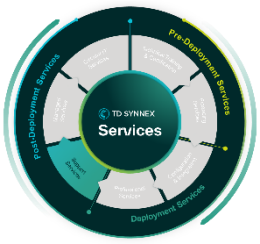
POST-DEPLOYMENT

Support Services

CompTIA research shows that **93% of organisations using managed services cite improved operational efficiency as a primary benefit.**

Support services extend the same efficiency value proposition beyond the managed services model, providing structured SLA-backed support for customers who may not be ready to fully outsource IT operations.

Support services are among the easiest services to attach at point of sale and create the ongoing customer touchpoints that generate expansion and upsell opportunities.



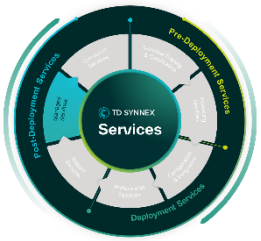
POST-DEPLOYMENT

Managed Services

Managed services is **the crown jewel of the attach strategy**: the service layer that transforms a transaction into a relationship. Omdia forecasts **13% channel managed services revenue growth in 2025**.

Managed services deliver **recurring monthly revenue, superior gross margins** compared to hardware resale, and the highest levels of customer stickiness in the channel.

Partners who attach a managed services wrap to infrastructure deployments retain customers at materially higher rates and generate significantly more lifetime value per account.



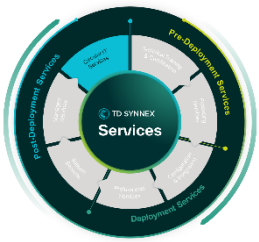
SUSTAINABILITY

Circular IT Services

The emergence of Circular IT from a niche sustainability offering to a mainstream commercial service category is **one of the most significant developments in European IT distribution.**

Rising ESG mandates, corporate sustainability reporting requirements, and growing customer demand for responsible technology lifecycle management are creating genuine commercial demand for trade-in, asset recovery, refurbishment, and responsible disposal services.

TD SYNNEX's Circular IT services are uniquely positioned to **create attach opportunities on every hardware refresh cycle.**



What services attach means for your business

The market evidence is clear. But the more immediate question is what services attach means for *your* business: your margins, your revenue trajectory, and your ability to hold customers against competitors. The answer is direct on all three.

1. **PROFITABILITY**: services change your margin profile permanently

Hardware margins face permanent pressure from online marketplaces, direct vendor programmes, and cloud hyperscalers competing on price. That pressure does not ease. Services margins do not face the same dynamic.

Applied to a live deal, that plays out simply: every service component attached raises the gross margin on that transaction, and managed and professional services consistently deliver the highest margin contributions in the channel mix. And unlike hardware, services revenue recurs — it does not reset to zero at the end of a refresh cycle.

2. **GROWTH**: attach rate is where your growth rate is set

The growth rates set out earlier are not the point on their own. The point is that your growth rate tracks your attach rate. The partners outgrowing the European channel are not those with the highest hardware volumes: they are those with the highest attach rates.

Omdia analyst data puts the 2025 European attach average in the **20–30% band**. The cohort running above **30%** are pulling ahead of the market. The gap between those two groups is not product range, vendor relationships, or headcount — it is discipline around attach. **Every deal quoted without a service component is a growth opportunity left on the table.**

3. **COMPETITIVE DIFFERENTIATION**: the service relationship is the moat

A customer who buys hardware from a partner is a transaction. A customer who buys hardware, configuration, professional services, managed support and Circular IT from you is a relationship. Pure product resellers can be undercut on price. Partners embedded across the full-service lifecycle cannot.

Omdia analyst data on managed services consistently shows materially higher customer retention rates for partners who attach post-deployment services. Each additional service layer **deepens the relationship, adds a contract renewal touchpoint, and raises the cost to the customer of switching.** In a commoditised hardware market, **the service relationship is the differentiator that competitors cannot easily replicate.**

From transaction to relationship

The TD SYNNEX *Services Value Cycle* represents a complete framework for capturing this opportunity. From technical training and financing before the sale, through configuration and professional services at deployment, to managed services, support, and circular IT in ongoing operations, **every layer of the *Services Value Cycle* addresses a genuine customer need that is growing in value and urgency.**

The partners who will lead the European IT channel in 2026 and beyond are not those who sell the most, they are those who build the most comprehensive services relationships, **attaching value at every stage of the customer lifecycle**, converting transactions into annuity revenue, and making themselves **indispensable to the businesses they serve**.

> *"The shift in focus from operational efficiencies to longer-term strategic challenges and embedding AI across all business functions will drive IT services growth to 10.7%. The next phase of investment will create sustained growth opportunities for partners over the next decade."*
>
> **— Omdia Channel Ecosystem Landscape, 2025**

Partner takeaways

The case for services attach is clear. The remaining questions are operational — what to do on Monday morning. Where you start depends on where you already are: if your attach rate sits below the 20–30% European average, the first three actions build the habit. If you are already above 30%, the last two are where the next increment of growth comes from.

***Attach at least one service to every deal**. No quote should leave the door hardware-only.*

***No complex deployment without professional services**. If it needs design, integration, or project management, quote it.*

***Start with the easy attach**. Extended warranty, configuration and imaging, Circular IT trade-in, training credits, and financing are the lowest-friction places to build the habit.*

*Treat every **tech refresh as a Circular IT opportunity**. Every retired asset, and every new one, is an attach point.*

***Aim above the European baseline**. Omdia put the 2025 European attach average in the 20–30% band; the partners outgrowing the channel are running 30%+. Use that as the marker.*

The partners who will lead the European channel in 2026 and beyond are not those who sell the most hardware, they are those who never quote hardware alone.

TD SYNNEX

Turn your next opportunity into more

TD SYNNEX already offers Services capabilities that complement your own portfoloiio and capability — helping you extend what you offer, add more value to every deal, and create new revenue opportunities from customers you already have.

Make your next deal worth more
Add the right services to your next opportunity to increase customer value, strengthen your margins, and build a relationship that lasts beyond the sale.

Ready to talk? *Ask us to call you back.* Scan the QR code and leave your name, we'll call you.

Prefer to explore first? *Visit the Services Hub at* hub.tdsynnex.com/services/home/



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This document is intended for TD SYNNEX channel partner use only. The analyst data cited is sourced from publicly available research and press releases. For the most current data, please consult the original analyst sources directly.

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REFERENCE

Analyst sources

The following primary analyst sources were used in the preparation of this white paper:

Analyst / Source	Publication / Report
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Gartner	Forecasts Worldwide IT Spending to Grow 6.8% in 2024 — Press Release, January 2024
Gartner	Market Share: Services, Worldwide, 2024
Gartner	Market Share: Infrastructure Implementation and Managed Services, Worldwide, 2024
IDC	IT Distribution Revenue Tracker Q4 2025, via BizTechReports, February 2026
Canalys / Omdia	IT Opportunity Update — November 2024
Canalys / Omdia	MSP Landscape Round-up 2024 — December 2024
Canalys / Omdia	MSP Trends and Predictions 2025 — Executive Summary
Canalys / Omdia	Channel Partner Investment in Cloud Hyperscalers — July 2025
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CompTIA	IT Industry Outlook 2025
Business Research Insights	Value-Added Resellers for IT Market Report 2025
Omdia	Global Partner 1000 — October 2025
ChannelPro / ITpro.com	What is a Value-Added Distributor (VAD)? — March 2026