



CHANNEL INSIGHTS

SUSTAINING DIGITAL EXCELLENCE




Diversifying the Channel:

Why International
Women's Day
remains relevant



ISSUE II 2023

 AN ANGEL BUSINESS COMMUNICATIONS PUBLICATION

SDC-CHANNEL.NEWS

INSIDE

News Review, Features
News Analysis, Profiles
Research Review
and much more...

PRACTICE WHAT YOU PREACH USE WHAT YOU SELL

Digital transformation not
only changes an enterprise's
technology, but also its people,
processes, and overall culture

HOW RESELLERS CAN RIDE THE RECESSION WAVE

Channel resellers are in a
precarious position, to cut
enterprise costs with inflation
at an all-time high

STAYING AHEAD OF CORRUPTION TECHNIQUES

Ransomware attacks will
become more advanced, and
organizations will need to do
more to keep their data safe

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Threat 'M32.Trojan.dx!tef' detected by Bitdefender



Bitlocker encryption disabled for disk volume C:\



Pending Reboot: This device needs a reboot to finalize a process: Today at 11:55 AM



Backup job failed: Plan Name: Daily
Workstation Image: 08/04/2022 8:00 PM



VIEWPOINT

By Phil Alsop, Editor

Variety is the spice of Channel life!

➤ AS I WAS PREPARING the articles for this issue of SDC Channel Insights to send off to the designer, it struck me that the various topics they cover are a pretty accurate reflection of the main technologies and themes which are the major focus for the Channel at the present time. Of course, the intention is that all articles in the magazine are relevant to Channel organisations, but I'm not sure if a single issue has represented so many key topics so well. I could pretend that I'd planned such diverse coverage, but the reality is that it's more of a happy coincidence than any editorial master plan.

And what are the technologies and topics you'll find in the following pages? Well, here's the list, in no particular order: the future, recession, the metaverse, diversity, cloud, security, AI and sustainability. The future and recession may, depressingly, be somewhat intertwined, but, good times or bad, the Channel has an important role to play in ensuring that their customers get the best possible value for money – the best solutions at the best price.

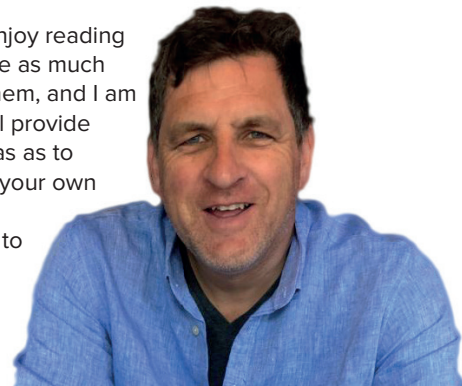
The metaverse continues to intrigue and confuse, with nobody quite sure as to where, when or how this next, bold step into a virtual world will start to impact the business world. Diversity is a major focus right now and where politicians might use it for their own sometimes dubious agendas, there's no doubt that, for the business world, a truly diverse workforce dealing with a truly diverse customer base has to be the way



forward. One might say the same about sustainability. Its major focus is reducing waste and optimising the use of precious resources – that has to make good business sense as well as being kind to the planet.

Add in the 'old favourites' of cloud and cybersecurity, which continue to keep plenty of board members, not to mention IT departments, awake at night, and I'm not sure there are any other important topics for the Channel right now. Skills, or the lack of, maybe, but the diversity focus can help to address this.

Anyhow, I hope you enjoy reading the articles in this issue as much as I did in preparing them, and I am confident that they will provide you with plenty of ideas as to how you can improve your own organisation and the benefits this will bring to your customers.



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Angel
BUSINESS COMMUNICATIONS

Diversifying the Channel: Why International Women's Day remains relevant

Digital plays a significant role in today's working world and remains a crucial factor in any organisation's growth plans in 2023. Like many industries however, the tech sector has been savaged by macro-economic uncertainty and faces a skills gap that may put the brakes on growth and innovation plans.

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Backup can be a bit like electricity or any other utility – it runs in the background, and you don't realise how important it is until you experience a blackout

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Worldwide cloud infrastructure services expenditure grew 23% year on year in Q4 2022 to reach US\$65.8 billion, an increase of US\$12.3 billion

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Job satisfaction drops as gender imbalance grows

New report highlights growing gender gap and shortage of women in senior technology roles, despite demand for professional development and career growth.

SKILLSOFT has released its 2023 Women in Tech Report, which explores the top challenges and areas of opportunity for women working in the technology industry. The report highlights a growing gender imbalance, with nearly half (45%) of women technologists surveyed indicating that they are now outnumbered by men in the workplace by ratios of four-to-one or greater – a significant increase from 25% who said the same in 2021.

This reported gender disparity is even more pronounced at the executive and senior levels of leadership. Skillsoft's IT Skills and Salary research found that among technology professionals with at least 26 years of experience, 15% of men hold executive-level positions compared to just 4% of women. Meanwhile, 30% of female technologists are reporting dissatisfaction with their current growth potential and 36% are considering leaving their jobs due to a lack of equity in opportunities.

Despite these obstacles, career growth remains a top priority for female technologists. 92% said professional development and training is an extremely or very important benefit, and when asked about ways employers can better support them, the top three responses were by providing professional development and training, more coaching, mentoring, and career counselling, and equitable pay, respectively. Additionally, female technologists are actively seeking opportunities to build leadership skills and move into senior roles. More than a third (34%) have earned certifications in leadership and management over the past year, up from 27% in 2021. Leadership and management is also respondents' top skill area of interest (41%), jumping from the number four spot in 2021.

"Despite the efforts of organisations to make diversity, equity, and inclusion



in the workplace a greater priority, our research shows that the gender gap remains quite wide and significant work is needed to achieve true parity at all levels," said Orla Daly, Chief Information Officer, Skillsoft. "Women in technology are calling for more opportunities to advance their careers via leadership development, technical training, coaching, and mentorship. This presents a mutual growth opportunity that helps organisations thrive and empowers women to increase their impact by filling these critical gaps."

Additional highlights from Skillsoft's 2023 Women in Tech Report include: Job satisfaction rates are declining, which poses a risk for retention.

- Just 28% of female technologists report being extremely satisfied with their jobs compared to 44% in 2021. Their top three areas of dissatisfaction are with growth potential, current pay, and managerial support, respectively.
- Nearly 40% of respondents are considering switching job roles. Their top three reasons for doing so are better compensation, lack of equity in opportunities, and ineffective leadership, respectively.

Training should be topical and timely for both employees and organisations.

- Following leadership and management, female technologists are most interested in upskilling in analytics, AI, and machine learning, project management, and cybersecurity, respectively. This aligns with critical business needs, as cybersecurity and AI and machine learning are among the top three areas of investment for organisations.
- Women in tech care about how they're learning. Above all else, they are seeking training opportunities that provide hands-on practice (40%). 37% also said they select training programs based on their preferred delivery formats, such as instructor-led training or on-demand content.

Benefits that support women inside and out of the workplace are impactful.

- While only 34% of respondents have access to coaching, mentoring, and career counselling services, 82% cite this benefit as extremely or very important.
- Only 55% of respondents have access to family leave benefits, despite 81% citing it as extremely or very important.
- Access to remote work increased the most for women in technology between 2021 and 2023, up 33 percentage points.

Automation, cybersecurity and integration top MSP priority list

Acquiring new customers amidst growing competition and dealing with sophisticated security threats cited as their greatest challenges.

KASEYA has released its 2023 MSP Benchmark Report, which surveyed more than 1,000 managed services providers (MSPs) from the Americas, Europe, Middle East, Africa and the APAC region. The report, which surveyed both technicians and executives, provides insights into how MSPs streamline processes to provide cost-effective IT support and infrastructure management to SMBs. The key findings centred around automation, cybersecurity and integration:

- About 90% of respondents hailed automation as a crucial technology for their business because it improves efficiency, allows them to take on more clients and generates more revenue by automating common processes like endpoint management, monitoring, patching, ticket resolution and even cybersecurity.
- More than half of the executive (64%) and technician (54%) respondents picked automation, including auto-remediation of tickets, as their top RMM feature.
- In year-over-year comparison, there is 15% jump in respondents who chose cybersecurity as the top IT challenge their clients expect to face this year.
- About 65% of respondents said most, or all, of their clients have asked for cybersecurity advice.
- 90% of respondents agree that integration between core applications is critical to their business. It helps them streamline their processes, reduce duplication of efforts and automate repetitive tasks.

“This report drives home the importance of automation and integration to make MSPs more productive, efficient and profitable,” said Mike Puglia, chief strategy officer and general manager of security products,

Kaseya. “Cybersecurity will continue to be a pressing issue, and MSPs will need to be up-to-speed on their security offerings to keep pace with SMB demand.”

Poor integration remains a problem

Lack of integration between solutions continues to hinder daily operations and productivity. In the survey, 39% of respondents reported that the biggest obstacle to business growth is the inability of technicians to maximise software usage. About 63% of executives surveyed said that integration enabled them to take on more clients and expand their business, with 54% saying fewer technicians were needed to manage the workload.

Almost half, 49% of the executives, also said integration helped them cut costs. Not surprising, about 60% of both executives and technicians surveyed are dissatisfied or neutral when it comes to work-life balance. Managing everyday mundane tasks causes them to struggle with getting their workload under control and even end up experiencing acute burnout. This can be alleviated by automating some of those mundane tasks.

Cybersecurity drives growth. The top five services that respondents intend to offer in 2023 fall under the cybersecurity umbrella, covering identity and access management, security awareness training and Dark Web monitoring. With cybercrime exploding, the percentage of respondents who back up their customers' SaaS applications, such as Microsoft 365, Google Workspace or Salesforce, increased to 83% from 78% in 2022. About one-third, 32% of the respondents, evaluate their threat landscape monthly and 35% evaluate quarterly, while only 11% do so annually, and a mere 1% never do so. Technician respondents said that

enhanced security services recorded the most growth in the last 12 months; executives reported it as second place. (For executives, subscription-based managed services took the top spot, with business continuity and disaster recovery (BCDR) service featured among the top four service categories.) MSPs anticipate these challenges.

The primary challenges MSPs anticipate are acquiring more customers as the MSP space intensifies (35% of executives) and dealing with advanced and sophisticated security threats (21% of technicians). Supply chain issues are levelling off – the percentage of respondents who said supply chain impact is significant dropped from 35% to 28% in 2023.

Let's talk about break-fix, co-managed IT and M&A

More than half of the technician respondents, 51%, reported break-fix as their most time-consuming activity. However, it is only the third most lucrative revenue stream according to executive respondents (39%). Subscription-based managed services is the top revenue generator according to 68% of executive participants and the second most time-consuming activity according to 43% of technicians. When it comes to what drives the biggest gain the break-fix model, executives cited hardware problems, while technicians said for them, it's access control.

About a third, 34%, of the respondents said they get between 1 and 25 per cent of their revenue from co-managed IT services. Another 29% said they get between 26 and 50 per cent of their revenue from it. About 51% of the respondents are keen to participate in some form of M&A activity. Of this group, about 14% said it is their primary growth strategy. Last year, only 36% of the respondents were bullish on it.

GoTo reveals the key trends shaping IT priorities in 2023

Consolidation of technology to reduce the burden on IT, save money, and ultimately find new ways to better support customers, among the key findings in the survey.

GoTo HAS published findings from its IT Priorities: 2023 Report. The report, conducted by Frost & Sullivan and commissioned by GoTo, looked at the global trends of 1,000 IT decision-makers at companies with less than 1,000 employees.

Among the key trends, the survey sees 83% of businesses considering consolidation of communication and IT management and support tools an important initiative for 2023. As an added benefit, this consolidation helps to alleviate the burden on IT, a goal of 92% of respondents.

As economic uncertainty, scrutinised budgets, and overburdened resources continue to be the norm, IT decision-makers are faced with determining the right set of goals and objectives to maximise their investment, grow their business, and streamline their processes.

The survey uncovered four main business objectives to ensure their organisation's success and support for their employees and customers. These include 1/ growing revenue, 2/

improving operational efficiencies, 3/ reducing costs, and 4/ increasing customer satisfaction. The key trends uncovered in this survey will allow teams to reach these objectives. Key IT Trends

- **Consolidation for enhanced productivity and cost savings:** 41% of businesses are planning to switch vendors to reduce costs. 83% of respondents consider consolidation of communication, collaboration, and IT management and support tools an important initiative for the year. 93% have completed, planned, or are in process with these consolidation efforts. The top reasons for consolidation were to increase employee productivity, give solutions to the IT team that are easier to manage, and cost savings.

- **With choice comes responsibility:** Nearly half (48%) said it was very important to consider reducing the burden on IT when choosing new software, compared to only 35% last year. 68% of company leaders say they are more involved in the purchase process of products and tools than they were a year ago.

- **Support IT teams with better IT support tools:**

65% of organisations say they saw an increase in the IT workload in the past year. 92% of respondents said they want to reduce the burden on IT through the right software choice. 40% of respondents said that their reason for digital tool upgrades and change was driven by IT team preference.

- **Hybrid work is still the preferred way to work:**

While the survey saw almost double the number of in-office workers compared to 2022 (36% now compared to 19% last year), hybrid work still remains the gold standard with half the respondents splitting their time between home and the office. Year-over-year results show a decrease of 10% in the number of businesses that have official rules on the number of days an employee needs to be in the office, meaning that employees have more flexibility than ever.

- **Find new ways to prioritise the customer:**

While businesses will only function if the right IT support and communication tools are enabled for employees, it's equally critical that externally-facing teams have the right technology to seamlessly support customers. 66% of respondents plan to spend more on customer experience (CX) technology in 2023 than they did in 2022.

- **Partners play a key role in decision-making:**

44% of businesses choose a partner versus 27% going to the solution provider directly to find new business communication and IT support tools. The survey saw a 55% increase in the use of partners in the past year.



CIOs must do more with less in 2023

SoftwareOne, a leading global software and cloud solutions provider, recently unveiled the findings of CIO Pulse: 2023 budgets & priorities.

THE STUDY, which recently surveyed 600 C-suite and IT decision-makers in the UK and USA examines how the current global economy is impacting IT priorities, revealing that despite 93% of CIOs expecting IT budgets to increase in 2023, 83% say they are under pressure to make their budgets stretch further than ever before – with a key focus on improved cloud cost management and tackling the reduction of mounting technical debt.

The survey found that 72% of CIOs admit they are behind in their digital transformation because of this technical debt, which is of particular concern as 92% of CIOs are expected to deliver digital transformation initiatives that act as revenue generators this year. 38% said the accumulation of this debt is largely because of rushed cloud migrations during the pandemic, with 31% failing to optimise their workloads before commencing the migration process. A further 38% revealed that their organisation miscalculated the cloud budget when provisioning, which resulted in significant cloud overspend. Many organisations also still have multiple on-premises IT legacy

systems and 51% of CIOs state that the complexity of legacy IT is one of the top three challenges they currently face. Marilyn Moodley, Country Leader for South Africa and WECA (West, East, Central Africa): “Businesses are dealing with an uncertain economic environment, which makes planning big IT transformations a challenge. Yet organisations need to move to the cloud and modernise legacy applications to remain competitive. We’re seeing a real need for a combination of innovation with optimisation. Our clients are looking for pragmatic step-by-step transformation initiatives, rather than wholesale megalithic projects that can be hard to get approved when budgets are under pressure.”

The survey findings reflect this. 45% of CIOs surveyed believe having improved transparency and control of cloud costs would help them extract greater value from their cloud investments and therefore improve company buy-in. 80% plan to increase their investment in FinOps to achieve this and 39% say they will use cloud native tools to reduce licensing costs.



Despite budget pressures, 82% will increase their investment in application modernisation. Security remains a priority, with 92% increasing investment in this space. According to Moodley, the next year is going to be a challenging one for businesses worldwide. “The increased agility that comes with cloud computing will allow companies to better respond to these unexpected market changes.

Adopting FinOps practices will help them optimise not just their spend but the processes, accountability and transparency required to get maximum value from their cloud investment. Once legacy IT is migrated and modernised, and cloud is optimised, any savings can be reinvested into innovative projects that help the IT team to achieve more with less.”

DCS DATA CENTRE SOLUTIONS

Developing digital infrastructure in a hybrid world

New product and process development is the foundation for the growth of the DCS industry.

If you want to highlight the recent important breakthroughs that your company has made, please submit an abstract to philip.alsop@angelbc.com

It is imperative that DCS Magazine remains a timely resource for this industry, so we are especially interested in highlighting very recent work.



ConnectWise releases 2023 MSP threat report

Drawing on over 440,000 incidents across the industry, new report helps MSPs identify key security risks and optimise prevention & mitigation strategies.

CONNECTWISE has published the findings of its annual MSP Threat Report. Now in its fourth year, the report provides an analysis of the major MSP-related security events and trends from the past 12 months, alongside predictions for the year ahead.

ConnectWise Cyber Research Unit (CRU) analysed over 440,000 incidents that impacted MSPs and their clients and identified the top five ransomware variants used to target MSPs in 2022, some of the biggest vulnerabilities impacting MSPs, and used this data to make predictions about upcoming trends MSP should be aware of.

“The findings of this year’s Threat Report highlight the growing importance of cybersecurity for MSPs and their customers.

As the threat landscape continues to evolve, MSPs must remain vigilant and take proactive steps to protect their networks and clients,” commented Patrick Beggs, chief information security officer, ConnectWise.

“By adopting a zero-trust network architecture, leveraging threat intelligence research and investing in specialised cybersecurity training, MSPs can stay ahead of the curve and build more effective protection for their mission-critical infrastructure and services. ConnectWise is proud to have a foundation of transparency and an integrated cyber infrastructure that supports reports like this. We can ensure strong countermeasures are in place to protect our partners – letting them connect with confidence.”

The report includes visuals so MSPs can cross-reference common techniques used and determine which are most likely to impact their business and customers. A heat map of the MITRE ATT&CK techniques and



sub-techniques observed during 2022 allows MSPs to be more confident in investing in cybersecurity efforts that will have the most impact in defending against attacks.

One of the significant findings in the report is the emergence of a new phishing technique used by bad actors targeting MSPs. It works by exploiting changes in the default behaviour of Visual Basic Application (VBA) macros handled in Microsoft Office documents downloaded online.

In 2022, this approach led to a rise in the use of LNK files to deliver payloads, which would then lead to ransomware deployments.

Based on this detailed insight, the report also offers a series of cybersecurity predictions for MSP in 2023 and beyond:

- MSPs will remain the target of supply chain and critical infrastructure attacks. As a result, many MSPs will look to an outside partner with the right expertise to start strengthening their cybersecurity posture.
- Zero trust network architecture is critical for MSPs. The most vulnerable MSPs are those without zero-trust network architecture (ZTNA), which is why governments worldwide will continue to expand their programs to require ZTNA from their vendors.
- Leveraging threat intelligence research and inter-organizational collaboration is essential for MSPs. Understanding current threats can help MSPs prioritise their time and efforts on what will have the most significant impact on their networks and those of their clients.
- MSPs will continue to solve the IT talent gap with tech stack consolidation and leveraging outside services. About three-quarters of IT industry leaders predict difficulties when recruiting data scientists or filling other tech positions in the coming years.
- Specialised cybersecurity training will increase across the industry, but ramp-up will take time. While diversified skill sets have worked thus far for MSPs, evolving threat landscapes is best addressed with cybersecurity specialists.

Cyber resilience disconnect

82% of cyber leaders agree they could have mitigated some to all of the damage of their most significant cyber incident in the last year if they were better prepared.

IMMERSIVE LABS has released a commissioned study conducted by Forrester Consulting to evaluate how global cybersecurity decision-makers perceive their organization's cyber resilience, defined as the ability and confidence to effectively respond to cyber threats. Despite high confidence in overall resilience, the study found that teams are insufficiently prepared for threats, as 82% agree they could have mitigated some to all of the damage of their most significant cyber incident in the last year if they were better prepared, and more than 80% don't think, or are unsure, their teams have the capabilities to respond to future attacks. To reduce risk, the study recommends a people-centric cybersecurity culture shift.

Forrester surveyed 316 global cybersecurity training strategy decision-makers in the UK, US, Canada, Germany, and Sweden, exposing this troubling inconsistency in cybersecurity team confidence: their initial responses express confidence in overall team resilience, but when asked specifically about how prepared the team is for another attack or how effectively the team resolves incidents, confidence plummets. Only 17% of respondents consider their cybersecurity team to be fully-staffed and nearly half of respondents admit they aren't able to measure cyber capabilities, further eroding confidence in the organization's preparedness. When cyber attack prevention and damage control are both lacking, organizations may be more vulnerable than initially thought. "We're seeing tremendous pressure on cybersecurity teams to prove their readiness for new and emerging threats, and while many feel they have built sufficient cyber workforce skills and judgment to respond, our study with Forrester Consulting reveals that nearly 50% lack the metrics to know for sure," said James Hadley, CEO &

Founder, Immersive Labs. "Our research suggests that it's well past time to rethink traditional training programs, and better equip cybersecurity teams with the skills and confidence to stand up to attacks."

The impact of cyber talent shortages

In the research, Forrester Consulting revealed several eye-opening findings from the pressures facing cyber leaders today to the impact of global cyber talent shortages, including:

- **Cyber teams face growing pressure from senior leaders:**
84% of respondents agree that cybersecurity teams feel increasing pressure to be prepared for the next cyber attack.
- **Cyber threats are becoming more difficult to stop:**
72% agree the threat landscape is becoming more challenging.
- **Reporting is inconsistent:**
Senior leaders should be sharing breach readiness and incident response results to a greater degree, but fewer than 60% do so today. In addition, over half (55%) agree their cybersecurity team doesn't have the data needed to demonstrate readiness to properly respond to cyber threats.
- **Teams aren't strategically equipped to maintain cyber resilience:**
Less than one-third (32%) believe their organization has a formal

strategy to ensure cyber resilience.

- **Talent shortages threaten cyber resilience:**
83% of respondents think their cybersecurity team is understaffed, and 94% experienced at least one talent management challenge with the cybersecurity team.
- **Cybersecurity teams reduce risk by adopting modern approaches:**
64% of respondents agree that traditional cybersecurity training methods (e.g., certifications, video training courses, classroom instruction) are insufficient to ensure cyber resilience. Leveraging effective people-centric approaches, such as live simulations, and progressive, career-path-aligned online training and upskilling can bolster cybersecurity teams' capabilities and, in turn, their organization's cyber resilience.

The study recommends that to alleviate staffing shortages and a lack of in-house cyber skills, "firms must reevaluate hiring practices to recruit and test for high-potential hires" and "invest in a culture that leverages effective people-centric approaches, such as live simulations, and progressive, career-path aligned online training and upskilling to bolster their cybersecurity teams' capabilities and, in turn, their organization's cyber resilience."



Business benefits for data mature companies

BMC has released findings from its global survey – “Profitable Outcomes Linked to Data-Driven Maturity” – which examines the relationship between data-driven practices and investment, and an outcome-based DataOps strategy.

THE NEED to unlock greater business value from data is clear, and a well-defined DataOps strategy is emerging as the key to manage and integrate analytics to uncover new opportunities, quickly respond to issues, and even respond to previously unforeseen challenges.

For organizations using DataOps methodology to support all data-driven activities, 41% strongly agree that their organization can apply data-driven insights to drive business goals compared to only 13% of respondents from organizations that do not.

Automation is necessary to scale up efforts around data use in an enterprise-wide, democratized data scenario, and a lack of automation (40%), along with data privacy and security requirements (38%) and data quality concerns (38%), are persistent pain points.

However, organizations with more mature data-driven practices, DataOps strategies, and strategic technology investments were shown to deliver better results.

There are multiple reasons to pursue data-driven practices and data-

driven maturity. The business outcomes that organizations cited they are most focused on improving through the effective use of data are increased revenue (68%), customer satisfaction (55%), and cost reduction (50%).

- Seventy-seven percent of respondents with highly mature DataOps programs report that customer satisfaction has been an area of greatest impact in their organizations' use of data.

- Fifty-five percent of respondents state customer satisfaction as an effective data usage-related spending and strategy goal. Yet, only 39% say they are highly effective at using data for customer-facing processes.

- The top drivers for organizational adoption of data management tools and processes are data quality and integrity initiatives (57%), business insights that drive new revenue (53%), and cloud migration initiatives (50%).



“Organizations recognize that they are in the midst of a data conundrum and that deeper investments in their data strategies equate to improved business outcomes,” said Ram Chakravarti, chief technology officer at BMC. “Enterprises will gain immense value by considering the entire flow and use of data from sources to insights and action, and having the right tools play a critical role in ensuring that success.”

Further, BMC’s Autonomous Digital Enterprise framework encompasses the data-driven business as a key tenet, to help our customers thrive now and in the future.”

DCS DATACENTRE SOLUTIONS

BASED around a hot industry topic for your company, this 60-minute recorded, moderated zoom roundtable would be a platform for debate and discussion.

MODERATED by an editor, this online event would include 3 speakers, with questions prepared and shared in advance.

THIS ONLINE EVENT would be publicised for 4 weeks pre and 4 weeks post through all our mediums and become a valuable educational asset for your company

Contact: jackie.cannon@angelbc.com



DCS ONLINE ROUNDTABLE

MANAGED SERVICES SUMMIT EUROPE

13 JUNE 2023

NOVOTEL AMSTERDAM CITY
AMSTERDAM NETHERLANDS



The Managed Services Summit Europe is the leading managed services event for the European IT channel. The event features conference session presentations by specialists in the sector and leading independent industry speakers from the region, as well as a range of sessions exploring technical and operational issues. The panel discussions and keynotes are supported by extensive networking time for delegates to meet with potential business partners. This C-suite event will examine the latest trends and developments in managed services and how they have influenced customer requirements and the ability to create value through managed services for your organisation and customers.

THEMES, TOPICS AND TRENDS

The Managed Services Summit will address the key trends and issues that impact the managed services sector including:

- How to build differentiation within an increasingly competitive market
- Maximise value and increase efficiencies for MSPs and their customers
- Increasing knowledge of new technologies, processes, and best practice
- Analysing trends in buyer behaviour and successful sales strategies
- Changes and trends in regulatory compliance
- Successfully adoption of Zero trust architecture (ZTA)
- Emerging advances in AI, automation and XaaS
- The state of cloud adoption, and hybrid and edge computing
- Hybrid and remote working best practice
- Addressing the growing cyber security skills gap
- Participation with local business community leadership organisations

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Diversifying the Channel: Why International Women's Day remains relevant

Digital plays a significant role in today's working world and remains a crucial factor in any organisation's growth plans in 2023. Like many industries however, the tech sector has been savaged by macro-economic uncertainty and faces a skills gap that may put the brakes on growth and innovation plans.

BY CELINE CAZALI, UKI CHIEF PARTNER OFFICER AT **SAP**



OVER THE COURSE of the last year, 75% of companies worldwide reported significant talent shortages. And the issue becomes increasingly prominent with the OECD's estimation that 1.1 billion jobs are liable to be radically transformed by technology in the next decade – with generative AI already having dominated the sector in the first quarter of 2023. Studies show that 43% of businesses are set to reduce their workforce due to such technology integrations, while other surveys point out that 80% of technology products and services will be built by those who are not technology professionals by 2024.

In the end, it all comes down to this dilemma: the need for digitally skilled talent.

What's worse, is that according to recent numbers, women hold only 26% of computing-related jobs today despite making up half of the population. How can we expect digital services to be adequately accessible for all, if we don't have a representative group of individuals involved in its development. While women continue to be underrepresented in the STEM space, they miss vital learning, development, and upskilling opportunities.

Each International Women's Day offers us the opportunity to pause and reflect on the progress we've made, celebrate our achievements, set goals, and challenge the status quo. As a woman working in the technology industry, I'm passionate

that we continue to support women and promote technology careers – especially at such a critical time for the sector.

Creating a diverse STEM workforce

As the need for digitally skilled individuals increases, we must ensure there are equal opportunities for women to get involved in the sector and develop new skills. As it stands, and with the UK Governments continue to push its technology and science agenda, the industry is ripe for innovation – and we must promote this further to ensure our industry remains balanced.

There are simply too many biases. Typically, when we think of the technology industry, we usually associate it with young white men in developer roles. These stereotypes often originate in the experiences and ideologies we encountered in our childhood and school years and are more often than not, very wrong. The fact that the IT industry is much more diverse, both in terms of the workforce and the roles that exist within it, is often overlooked, which is why it is so critical we promote a diverse group of role models to young people. By encouraging children and teenagers to undertake STEM courses, giving them the confidence to find their place within the industry, we can begin to move the needle.

Women in the Channel

One particular area of the industry which is often forgotten about is the channel, for it's not the stereotypical technology role we're used to hearing about. There are huge opportunities for women wanting to work in the sector though. I myself have had the pleasure to collaborate with so many talented fantastic women, and the space allows women with the opportunity to build real, long-lasting relationships and work on mid-term initiatives from start to finish.

In my experience, the channel industry is doing better than most. It is very balanced, attracting people with a variety of backgrounds and experiences, and a brilliant opportunity for women to build a strong network with partners, sales leaderships teams and customers. It also gives women the opportunity to take on roles of influence. We have so much to gain from, and also offer, the industry – and it's our role to help others realise the opportunities for them.

Making the industry work for women

Historically, women were prevented from progressing in their careers because of childcare and family commitments, but since the pandemic this concept has been truly flipped on its head. With the greater flexibility offered by home and hybrid working, women can now make their role work for them. And businesses have realised the structure of a 9-5 role is not always fit for purpose.

Trust in employees is critical to this. Open dialogue between managers and employees right from the

There are simply too many biases. Typically, when we think of the technology industry, we usually associate it with young white men in developer roles

very beginning can ensure that there's a combined feeling of support and security in their role no matter what their personal situation.

People managers also have a powerful influence on an employee's sense of belonging, which can have a huge impact on the retention of any employee working in any industry. However particularly for an industry that's male dominated, making women feel like they have a role within the business can make the difference between them choose to leave, stay or return to the industry.

The channel, and technology industry as a whole, is a wonderful place to attract and retain women, where individuals can build trusted partnerships, a great network and as a result can inspire other women into future careers.

The next year will be an exciting and challenging time for tech. Artificial intelligence (AI) tools such as ChatGPT from OpenAI are spurring conversations about the future of work and are being leveraged to make business-critical decisions. We've already seen calls for the pace of its development to be halted as businesses and governments understand how they intend to use and regulate the technology – but the opportunities it offers are huge. Bias in AI is already a known fact, and its continued advancement may, in fact, spur on greater diversification in the industry. We must continue to celebrate International Women's Day each March, as a reminder of the need for continued improvement and development for the benefit of the entire industry.



2023: A distributor's eye view

The start of a new year is often a prime opportunity to take time to reflect. Looking back over the last twelve months, I can see that technology has been an important part of the response to overcome many of the challenges that are being experienced across the globe.

BY NICK BANNISTER, VICE PRESIDENT SALES FOR ARROW'S ENTERPRISE COMPUTING SOLUTIONS BUSINESS IN THE UK AND IRELAND



THE TECHNOLOGIES that continue to be important. Unsurprisingly, throughout 2022 we have seen hybrid working widely adopted, and increased demand for the technologies that allow these working practices to become business as usual. As we move into 2023, this is likely to continue, as well as adoption of the technologies that support wider digital transformation – from complex, enterprise IT environments, to cloud, and software solutions.

The rollout of gigabit-capable full fibre networks is also continuing at pace across the UK. Access to gigabit capable connectivity is becoming more readily available, a key enabler of digital transformation. These networks are helping channel partners to sell more of the 'over the top' services that rely on a reliable, high speed connection, allowing end-users to harness their full potential. Security will always remain high on the boardroom agenda as the threat landscape continues to evolve and attacks become ever more

complex. Technologies such as AI, machine learning and deep learning will also play a significant role in shaping the channel as end-users look to embrace automation to harness productivity benefits.

How channel partners are evolving

I spend a lot of my time meeting with our channel partners, and through these discussions I can see the essential role we play as a distributor. Channel businesses have evolved and those that thrive are those that have become consultants and advisors. Their customers are looking to them for authority and expertise, and often the skills that they don't have in-house in order to make the most of any investment they make. It presents a great opportunity to deepen and strengthen how they work with their customers.

This is where, as a distributor, we can add a lot of value to our own channel relationships.

Many don't have the skills in-house either.

They can lean on us to provide this expertise, support and training.

It's why we established our Arrow Authorised Partner

Programme last year, to address the gap between



Last year Arrow brought its channel partners together with economists from the Bank of England, and representatives from Hitachi Vantara and Arrow Smart Terms to talk about the economy, the impact this is having on business, and the support available from Arrow to mitigate uncertainty

the large breadth of vendor solutions we offer, and the service capabilities available through our highly expert teams. It's been well received by our channel partners, and is particularly welcomed in a market where skilled people are in short supply and high demand.

Mitigating economic uncertainty

No one is immune to the global economic conditions being experienced at the moment. Last year Arrow brought its channel partners together with economists from the Bank of England, and representatives from Hitachi Vantara and Arrow Smart Terms to talk about the economy, the impact this is having on business, and the support available from Arrow to mitigate uncertainty.

The importance of protecting working capital was highlighted in particular, along with the effect of mounting inflationary pressure on the end customer. Working closely with your distributor is essential

in these times. Increasingly channel partners need non-standard terms to secure deals and manage their working capital. They need to manage what they can. We launched Arrow Smart Terms to support the channel by allowing customers to order from partners under a periodic billing methodology and then mirroring that up into the supply chain.

Arrow Smart Terms is designed to support channel partners to meet the payment demands placed on them by customers. Available for subscription, support, and hardware, it provides the opportunity to match the deferred payment terms covering the period beyond standard terms for periods as long as five years.

To conclude, as hardware supply constraints are easing, and demand remains strong for technology, we will continue to do all that we can to support our channel partners through 2023.

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Developing digital infrastructure in a hybrid world

New product and process development is the foundation for the growth of the Datacentre industry.

If you want to highlight the recent important breakthroughs that your company has made, please submit an abstract to philip.alsop@angelbc.com

It is imperative that DCS Magazine remains a timely resource for this industry, so we are especially interested in highlighting very recent work.



Building a sustainable future for the channel

2023 will be the year where channel partners will need to continue to leverage more technologies to address the challenges that the channel sees on a daily basis, all whilst remaining steadfast in their ESG narrative.

BY CHRIS WADE, CHIEF MARKETING AND PRODUCT OFFICER, **GAMMA**



A STRONG CHANNEL STRATEGY is forged with the right mix of technology, support mechanisms and security. Over the last twelve months, channel partners have continued to implement solutions, tools and programmes to enable their customers to better protect and safeguard their assets. Moving further into 2023, this is going to need to continue, but with an ever scrutinising eye on sustainability and talent growth, channel partners will need to become even more disciplined than before.

Moving into the next phase of the year, the channel needs to take its environmental, social and governance responsibilities seriously with systematic assessment and continued development of their ESG agenda.

A sustainable business is key to longer-term value creation for stakeholders, employees, and customers. It is a part of how channel partners will need to begin to operate, and trusted vendors and customers can help guide them.

Sustainability is the Key

Sustainability is not a new concept. Yet, progress in the past 126 years has been slow. The channel has a responsibility to build and implement resilience and also technologies that are aiding the sustainability field.

Channel partners around the world are facing a few significant challenges, one major issue being the growing emphasis on sustainable business practices led by policymakers and stakeholders. Bridging the gap between the known and unknown here can be difficult, but with the right strategy, partnerships and trust, channel partners can deliver the right combination of efficient performance and compelling economics to propel themselves forward.

Channel partners need to work with trusted vendors to identify and implement initiatives that will help them reduce their impact on the planet. Working

more closely and collaboratively with customers and suppliers will help us share knowledge, to understand what we're doing and also demonstrate our good environmental practice, while learning from others.

If the channel still has any doubt about engaging in sustainability practices, partners should be suggesting they look at their own workforce. The importance of considering sustainability practice as part of the employee experience cannot be underestimated if businesses are to attract and retain the best talent.

How do we move forward?

2023 will be the year where channel partners will need to continue to leverage more technologies to address the challenges that the channel sees on a daily basis, all whilst remaining steadfast in their ESG narrative. Strategies need to be strengthened, as the nature of the landscape and the complexity of environments has changed. This is a great opportunity to bring in different perspectives, in the ESG or IT space, that will play a prominent role in a company's success in securing themselves for the future.

Knowing how to achieve a good ESG strategy will come from a solid partnership, built on trust, and constant communication, change and understanding. But you're not done there, the channel then needs to continue to measure and monitor their emissions, repeat the planning exercise and revisit those plans to make sure that they are achieving what they hoped.

One thing that's already very clear is that a small team can't make it happen alone. The channel is a small part of a big machine that needs everybody across the landscape to understand what we're trying to do and help us to identify the opportunities and mitigate any drawbacks. Achieving Net Zero won't be easy, but it's the only way forward if we want to preserve our planet.

MANAGED SERVICES SUMMIT LONDON

13 SEPTEMBER 2023

155 BISHOPSGATE
LONDON, UK



The 13th Managed Services Summit London is the premier managed services event for the UK IT channel. 2023 will feature presentations by leading independent industry speakers, a range of sessions exploring technical, sales and business issues by specialists in the sector, and extensive networking time to meet with potential business partners. This is an executive-level event, exploring the latest trends and developments, evolving customer requirements and how to create value through managed services – both for your own organisation and your customers.

THEMES, TOPICS AND TRENDS

The Managed Services Summit will address the key trends and issues that impact the managed services sector including:

- How to build differentiation within an increasingly competitive market
- Maximise value and increase efficiencies for MSPs and their customers
- Increasing knowledge of new technologies, processes, and best practice
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Securing the metaverse

The metaverse presents great opportunity, but it must be approached with caution

BY SASCHA GIESE, [SOLARWINDS HEAD GEEK](#)

THE METAVERSE promises to provide an environment for people to meet, interact, and collaborate in a way that mimics real life. In fact, Mark Zuckerberg once went so far as to suggest it might reach a point where people leave reality behind to enter an entirely new world in the metaverse.

It's clear there are big plans for the metaverse to become a place where people can work, play, and interact with one another. Over the next few years, we'll likely see more industries getting to grips with the metaverse and taking advantage of what it has to offer.

The public sector should be no exception. From delivering services digitally to using the space

for training and simulations, potential uses for the metaverse are vast, and it will be up to governments to decide how best to take advantage of the platform.

But what about the risks?

As with everything, there are going to be risks involved. As the metaverse is a virtual space, it's vulnerable to many of the cyber risks existing in other online environments.

Alongside the usual risks of hacking, phishing, and malware, the metaverse also introduces some unique risks. Users will likely be targeted for cyberattacks based on their activities and experiences within the metaverse. For example, there could be attacks designed to steal virtual



currency or property – or even disrupt the running of the metaverse itself.

User privacy will also be at risk of being violated. Due to the virtual nature of the metaverse, it's possible users will be less aware of how their personal information can be gathered and used without their consent or knowledge. This might include information such as browsing habits, location, and other data capable of being used for targeted advertising or other purposes.

This risk is no different within public services. As citizens are the users, there is a risk of someone's account being hacked or even identity theft.

Is identity theft something to be worried about?

Though it may be relatively uncommon, criminals may use the metaverse to steal users' identities. In the extreme case of identity theft, there's a huge amount of accompanying risk. Criminals might open new accounts under the victim's name – including credit card or bank accounts then used to make purchases or withdraw money—and they may apply for loans and leave the victim with a damaged credit score, among other things.

On top of this, they could easily use the victim's personal information to commit crimes ranging from fraud to espionage.

Identity theft is going to become a risk of the metaverse, so it's essential for individuals to proactively protect their personal information. Remaining vigilant is key to identifying early signs of theft.

It's a virtual world

Although this may seem like an obvious thing to point out, it's important to remember the metaverse is virtual, and concepts existing within the metaverse will also be virtual.

You can own virtual territory, art, and so on in the metaverse. These goods are paid for with cryptocurrencies, and though money lost through credit card scams usually gets reimbursed, this isn't likely to happen in a virtual space with currencies such as Monero or Ethereum. When it's gone, it's gone – there's rarely a trail to follow.

The metaverse is comprised of open and closed

systems – open metaverse environments are usually democratised among the user base, and closed metaverse environments are under the control of a centralised company or organisation.

Both systems invite people to stay within these bubble environments. These environments will be prone to propaganda, and users will need to stay aware of this as they navigate these spaces.

Being cautious will be key

It's clear the metaverse is continually presenting new opportunities for individuals, organisations, and the public sector – however, challenges walk hand in hand with these opportunities.

Users should remain aware of the potential risks associated with using the metaverse and take care to protect themselves and any virtual assets they have. On a basic level, users should avoid suspicious links and virtual elements, use strong passwords, and remain careful about what personal information they share in the metaverse.

One thing is obvious to me: regular citizens aren't going to be the first to enter and use the metaverse. Crime is already going to be there and waiting for us, and we need to protect ourselves.





How resellers can ride the recession wave



Channel resellers currently find themselves in a very precarious position. With the mounting pressure to cut enterprise costs and inflation at an all-time high, this is prompting vendors to liaise directly with distributors and customers, to ‘cut out the middle-man’.

**BY MARK JONES, HEAD OF CHANNEL,
FOR UK & IRELAND, AT **SANGOMA****

THE LOOMING RECESSION is one of the main challenges facing all businesses this year. They need to rethink business strategies, which is leading to drastic action from large technology companies such as Google, Amazon and Salesforce, in making over 55,000 layoffs in January 2023. Redundancies are being felt through the technology industry, with UC companies such as 8x8, RingCentral and Avaya making layoffs to help cut costs too.

However, despite cost cutting actions causing chaos, resellers still have a key role to play within the channel. Their expertise and knowledge makes them vital to the channel supply chain, but they must position themselves as invaluable to both vendors and customers. The question is, how?

Showing value

Resellers, more than ever, must show their value to vendors and customers by continuing to offering

more value added services to expand their portfolio. As customer demand shifts to wanting consumption-based models shifts to subscription models, resellers must evolve in line with this and offer these services too. Business no longer want to be tied into long contracts, and if resellers want to remain relevant and keep their client base, they too must do away with them.

Showcasing their value as a one-stop-shop for technology solutions, such as Unified Communications solutions, allows resellers to prove their worth within the Channel, and makes them more 'sticky' to their customers. If a reseller can provide a range of services in line with the vendor they are working with, they become far more expert in their field.

Establishing trust within the channel

In such tough economic times, it is vital to establish trust and collaboration between resellers, vendors, customer, and channel partners. But trust is mutual. Resellers must showcase their expertise, knowledge, and results to vendors to establish a trusting relationship.

With customers becoming more demanding and recession fears plaguing people's minds, enhancing collaboration through the channel will allow both vendors and resellers to thrive.

Collaboration will allow resellers to continually expand their service offerings in new sectors, explore new customer bases and opportunities for growth, which in turn will provide more customers and sales for vendors.

Increased collaboration between the two parties will provide a full overview of the channel supply chain and streamline processes, ultimately enhancing the overall experience for channel customers. One-stop shop technology providers can go one step further by providing customers with one single channel partner, from which customers can choose which UC and tech service they require for their business. Establishing trust within the channel will not only allow businesses to succeed, but also create a flourish channel partner network that can seamlessly deliver a super customer experience for the end-user. Establishing seamless channel collaboration between partners can help not only resellers showcase their value within the supply chain, but also enable vendors and MSPs to sell to a wider customer audience.

Resellers and vendors who establish a trusting relationship and collaborate effectively will be the ones to succeed in riding the recession wave. And establishing a strong working relationship makes it less likely for vendors to only see resellers a 'middle-man' in the cog.

Seizing opportunities

Despite the economic challenges facing businesses

With customers becoming more demanding and recession fears plaguing people's minds, enhancing collaboration through the channel will allow both vendors and resellers to thrive

this year, customers are still demanding a seamless customer experience. With customer demands becoming increasingly high, this could pose a further challenge for resellers to meet these demands, or risk being cut-out if a vendor chose to sell directly to a customer. Resellers must provide customers with a seamless customer experience to reinforce and solidify their valuable within the channel supply chain.

Resellers can do this by building an agile workforce, utilising hybrid working practises and unified communication solutions to ensure employees are available constantly for customers at any time, from anywhere.

With new technologies offering businesses a range of new and exciting possibilities, the benefits of an agile workforce can place channel partners and resellers in a unique position to enhance efficient internal and external communications. Retaining customer loyalty and providing a high level of customer service is now vital for resellers to continue showcasing to vendors how valuable they are.

2023 will likely pose further challenges to technology and channel companies, however, aligning together now will enable vendors and resellers to prepare, and allow them to seize any and all opportunities within the channel.





Practice what you preach by using what you sell

not only changes an enterprise's technology, but also its people, processes, and overall culture. With many business-to-business (B2B) organisations embracing this shift, it is essential that they have deep insight into how their products impact their customers.

BY SCOTT CROWDER, CIO AT **BMC**

LIKE A CHEF knowing the taste of the food they've prepared, it simply makes sense for enterprises to understand the products and services they sell. This is particularly true today, with higher customer standards to meet and unpredictable global events to manage. Enhancing business processes and becoming an Autonomous Digital Enterprise (ADE) goes hand-in-hand with customers' future success.



By using their own products and services, enterprises can build and maintain trust with customers, particularly when helping them navigate their own digital transformation. Technology solutions can significantly impact the

way services are delivered, and how employees work, so prioritising internal stakeholders can help organisations set themselves apart from competitors.

The key benefits

By using their own solutions, organisations can identify tangible business problems that customers might face. When an area for improvement is identified, business leaders can be confident that a market need likely already exists for that solution.

Additionally, when an internal stakeholder is an early adopter, they will be able to speak from experience

when making recommendations to customers on how to implement and integrate new technology. Internal stakeholders need their tools and systems to just work.

Whether the employees work in customer support, or in other areas, ensuring they have a bug-free and optimised product helps align their work to the goals of the company. One of the biggest struggles when marketing a new product is getting referrals from customers. Even when customers are happy with the product, they may be reluctant to speak about the vendors they work with for fear of disclosing proprietary information. When companies adopt their own software, they can document the benefits and offer first-hand experience.

A matter of trial and error

A number of enterprises use their own products and services first-hand and achieve significant growth. As an organisation offering automation solutions, we understand the need for a product to manage ever-increasing data volumes. As more customers adopt cloud-based SaaS solutions, getting data sources into a data warehouse for loading, processing, and integration—which often requires numerous tools and custom scripting – can be a major pain-point. That can be worsened by scalability limits, which can quickly escalate from an IT problem to a business problem: Data quality issues can jeopardise critical functions like executing payroll on time, and without validation, bad data is not always apparent.

To address this, we turned to our own automation and orchestration platforms to simplify processes across multiple systems of record, making data migration to the cloud possible, while providing the scalability and elasticity into a data warehouse that modern business demands.

Similarly, many businesses are facing challenges that their customers can also relate to, so leveraging internal learnings and improvements reveals new opportunities to help customers.



How to build credibility

Marketing departments spend significant amounts to gather intelligence and better understand their customers. They conduct focus groups and assemble panels of customers as advisory councils to find out where their product stands today, and where the road should lead next. While these are valid strategies to identify and solve customers' problems, it's not the same as taking a walk in their shoes.

By using their own solutions and services, and ensuring internal stakeholders understand them thoroughly, enterprises develop the empathy that helps establish credibility with customers, and gain insights that empower them to deliver customer-centric value.

Together, those two qualities will distinguish them from the competition and ensure a long-lasting customer relationship that continues to offer reciprocal value.

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Ebstar helps customers stay productive with rapid and reliable recovery

Backup can be a bit like electricity or any other utility – it runs in the background, and you don't realise how important it is until you experience a blackout. Managed service provider Ebstar helps its customers mitigate the risk of a data blackout with its backup and DR services.

USING Arcserve SaaS Backup, ShadowProtect SPX and OneXafe immutable storage, Ebstar helps its customer protect both onsite and cloud-based data against ransomware, server failure, accidental file deletion and corruption, as well as fire, flood and other disasters. With rapid and reliable recovery, Ebstar can keep its customers productive while boosting its own competitive advantage.

A trusted consultant

Founded in 1997, Ebstar offers innovative, tailored IT services for SMEs across the UK. It aims to provide consistent, high-quality services for organisations regardless of whether they have 10 users or 500. Ebstar helps its customers address a wide range of business, and IT concerns – from reducing security risks to enabling remote working.

As a trusted consultant, Ebstar provides expert advice and recommendations on IT purchases,

as well as managed services, support, IT security, DR-as-a-service, firewall-as-a-service and end-to-end connectivity services, including telephony. The company strives for technical excellence, making investments in training so that its advisers and engineers can respond more efficiently to customer needs. Thanks to its long-term relationships and high customer retention rates, Ebstar has achieved steady organic growth since its inception.

Ensuring cost and reliability

Cost and reliability are key to competitive advantage for managed service providers. Ebstar needs its engineers and advisers to be able to work efficiently, particularly when it comes to managing core services such as backup and recovery. "Customers need to know that we can recover their data in the event of an incident, and we need to know that we can do so quickly," explains Nick Beeby, Owner and IT Consultant at Ebstar. "As well as potentially

causing downtime for our customers, a lengthy recovery process consumes lots of resources and pushes up costs, so time is of the essence.”

Rapid recovery capabilities are essential for data stored in the cloud as well as onsite. “Customers tend to assume that if data is stored in the cloud, it’s safe, but this is not always the case,” comments Nick Beeby. “Part of our role is to educate customers so they understand the risks and can make informed data protection decisions for both on-premise and cloud-based systems.”

Ebstar’s legacy backup and recovery solution required significant manual intervention, which not only impacted the company’s efficiency and the speed of recovery but also increased the risk of human error.

Accessible high standards

To enable rapid recovery, Ebstar now uses Arcserve solutions to underpin its core service offerings. With Arcserve SaaS Backup, ShadowProtect SPX and OneXafe immutable storage, Ebstar can make enterprise-standard protection accessible and affordable for smaller organisations. “We recommend the Arcserve solutions as standard for all our customers,” comments Nick Beeby.

The company rolled out Arcserve SaaS Backup in February 2022, using the solution to protect Microsoft 365 data for around 300 seats across 12 organisations. Ebstar has also been using ShadowProtect since 2015. It now uses the latest version – ShadowProtect SPX – to run hourly offsite server backups for its customers.

ShadowProtect is partnered with OneXafe immutable storage to enable a layered approach to data protection, with onsite backups replicated to Ebstar’s private cloud environment, which is based on a cluster of three OneXafe devices. “With OneXafe, we know that we’re protected against ransomware, which can spread swiftly through the supply chain,” comments Nick Beeby. “The data is also encrypted onsite to mitigate the impact of potential data leaks.”

With data-agnostic protection, Ebstar back up all kinds of data for its customers, including Windows and Linux servers, SQL databases, Active Directory databases and application and file data. In total, Ebstar protects around 70 servers, of which 90 per cent are virtualised.

With self-recovery built into the solution, Ebstar can minimise management time and effort while having confidence that its customers’ data is protected. “If a backup doesn’t complete, the solution will try again so we don’t miss any data,” says Nick Beeby. “Backups are easy to monitor and manage from the centralised ShadowControl monitoring platform.”

ShadowControl is integrated with Ebstar’s service desk using ConnectWise, enabling automated alerts which further simplify management. The ability to view anomalies with offsite replication in Image Manager was particularly helpful when they brought to light an out-of-hours ransomware event, enabling Ebstar to deal with the incident quickly and effectively to prevent any data loss for the customer.

Reliable recovery

In the eight years that Ebstar has been using Arcserve solutions, it has never experienced a failed recovery. The company can recover entire servers in around 15 minutes with Arcserve HeadStart Restore (HSR), which enables recovery to start while the production server is still running. And in the case of a disaster such as fire or flood, Ebstar can invoke customer systems from its private cloud almost immediately to minimise disruption.

More commonly, however, Ebstar is called upon to assist with an accidental file deletion or corruption event. “Just last week a financial director called in distress as they had lost a document that had been corrupted,” says Nick Beeby. “Within a few minutes of getting in front of a computer, I was able to recover the file and save them hours’ of rework.”

To enable rapid recovery, Ebstar now uses Arcserve solutions to underpin its core service offerings. With Arcserve SaaS Backup, ShadowProtect SPX and OneXafe immutable storage

Thanks to Ebstar’s investment in training and engineer certification on the Arcserve solutions, as well as their intuitive design, the team can onboard customers quickly and easily. “The configuration options are plentiful for our purposes, but not overbearing,” comments Nick Beeby. “The Arcserve solutions are also highly scalable as we can self-provision licences as and when we need additional capacity.”

Day-to-day management and reporting on backup and recovery is also efficient with the Arcserve ShadowControl dashboard, freeing up staff for other activities. Many of Ebstar’s customers have to comply with industry regulations around data protection, and these reports provide evidence of a successful backup strategy to simplify compliance with regulatory and audit requirements.

“With Arcserve, we can avoid costly data loss for our customers so they can stay productive and compliant,” concludes Nick Beeby. “While rapid and reliable recovery helps us operate efficiently, build customer trust and keep our promises.”



2023 is the year that AI transforms how global companies manage their company spend



PROCUREMENT EXPERT KEITH HAUSMANN, CHIEF CUSTOMER OFFICER AT [GLOBALITY](#), highlights how NLP and machine learning are driving efficiencies and savings while enabling sourcing teams to add more business value.

ALGORITHMS have performed wonders for shopping around in the B2C space. From finding your next holiday destination to finding your dream home, sourcing what you need - when you need it - has never been easier or quicker.

This has always been somewhat of a painful comparison to the B2B world, where finding the right supplier for a product or a service at best price has always been more difficult. And this holds particularly true for spending money outside of producing your main offering, the categories known as indirect spend.

For too long, hiring, say, external specialist legal expert advice to meet a thorny problem in a specific geography, or applying additional performance marketing to a specific strand of your audience, has been a bespoke process each and every time, requiring a lot of hours and detailed sector

knowledge. Getting the genuinely best deal, as well as predicting and tracking this spend adequately, is just too hard.

This difficulty around indirect spend has often been blindly waved-off. It can account for as much as 40% of total overhead yet rarely draws proper C-Suite attention, with outlay on things like marketing and real estate upkeep outlay being just accepted as 'the cost of doing business'. This casualness has now somewhat disappeared as the realities of the current global economic downturn become more visible on a daily basis, and leaders are desperately looking to protect their bottom lines.

Cometh the hour, cometh the bot

AI is now rapidly changing all of that - quickly and efficiently scoping needs and matching companies with the suppliers that best meet the project requirements. The most innovative solutions allow users to compare project costs and timelines instantly across proposals, giving them a negotiation advantage. And all of this information can be sent electronically and seamlessly to the customer's contracting and record keeping systems.

These new AI-advisors also keep totally up to date in a market by automatically analysing proposals and developing appropriate negotiation recommendations. And the more you source with the help of AI, the more the AI learns, and so feeds useful data and insights back to you exponentially. Businesses embracing this now make better-informed, merit-based decisions in a much more efficient way than the traditional, manual procurement processes.

The AI wave has begun with the early adopters. It's already starting to happen. CPO of BT Group, Cyril Pourrat who is an early adopter of AI and uses autonomous sourcing platform Globality, achieving double digit savings, recently said – "We want to fully leverage AI, machine learning and the digital ecosystem to position ourselves differently compared to other procurement companies." Another great example of a champion leading the way and embracing autonomous sourcing is Logitech's Head of Global Indirect Procurement, David Latten. He said: "Logitech is quite an autonomous company and if people feel that our purchasing model hinders rather than helps them, they will bypass us and simply use whichever suppliers they want.

"So, the key for procurement is to provide a seamless, user-friendly experience which makes the business stakeholders' lives easier and makes them want to work with us to find the best supplier for each project, ensuring that the list of providers they are offered includes diverse options. New technology is the way to make it easy to drive gender equality and at Logitech, our autonomous sourcing platform, delivers a consumer-like interface which our business stakeholders love."

Leading businesses such as BT and Logitech are using AI-powered autonomous sourcing to discover new suppliers in real time in addition to their existing ones; effectively collaborate with colleagues and suppliers; and significantly reduce costs through increased competition, data-driven insights, and intelligent analysis.

What does it mean for the humans in procurement? The reality is this. As automation becomes more prevalent in procurement to achieve the kinds of economies of scale and efficiency in indirect spend that we see in direct spend, companies may decide they no longer need large procurement teams focused on transactional work.

But that doesn't mean mass layoffs. Procurement teams will actually improve their position within a business. As transactional tasks will be completed much quicker, they can swing their attention to leverage insights derived from the technology to aid the business as a whole. They will become business advisors and relationship managers, focusing instead on supplier collaboration, innovation, and R&D. And, as a result, they will get a much more prominent and valued seat at the table.

This will also start to elevate procurement as a whole to become the central accountable point for the whole enterprise. As custodians of the most impactful data a company generates, they will end up controlling an increasingly strategic lever that helps companies better manage costs while prioritising resources in fully data-driven ways in key areas.

AI-enabled autonomous sourcing is a powerful breakthrough that at last helps companies drive maximum value from every pound they spend, and indeed, from the people who currently oversee it. Jump on board or be left behind.

This difficulty around indirect spend has often been blindly waved-off. It can account for as much as 40% of total overhead yet rarely draws proper C-Suite attention, with outlay on things like marketing and real estate upkeep outlay being just accepted as 'the cost of doing business'



Staying ahead as corruption techniques evolve

Without a doubt, ransomware attacks will become more advanced, and organizations will need to do more to keep their data safe. It will become crucial to prepare for what is ahead, rather than just what is happening now.

BY KEV ELEY, VP SALES EUROPE AT **LOGRHYTHM**



IN 2022, 71% of companies worldwide were affected by ransomware. Ransomware operators are continually unleashing new variants of wiper malware into the ecosystem to cause destruction and irreparable losses. A wiper attack is a form of malware threat which erases the hardware of the IT system and deletes critical business data with malicious intent.

Companies must build their strongest defense against wiper attacks by performing regular data back-ups to avoid network downtime and secure business continuity.

Ransomware attacks are constantly evolving and as chief information security officers (CISOs) secure their systems this year, acting on the attackers favoring corruption of data over encryption is imperative. Organizations cannot afford to fall prey to threat actors, who are increasingly corrupting data through wiper attacks, that cripple systems and destroy valuable data.

During the first half of 2022, the number of malware attacks worldwide reached 2.8 billion. Every new year brings a greater sophistication of cyberattacks and so the importance of backing up critical

business data has never been higher. Ransomware has been an attack vector in continual development over the years and is perhaps the one common threat that keeps all CISOs awake at night. In 2023, we'll see ransomware attacks focusing on corrupting data rather than encrypting it.

A quicker way to steal crucial data

Some may wonder why data corruption is on the rise – it seems less effective at face value. However, encryption takes far longer and requires a lot more skill to complete. When a hacker encrypts data, they need to investigate public-private key handling and build an entire decryption code to resolve their work when the organization hands over payment. This is extremely complex and time-consuming, wasting the hacker's time and resources.

Many organizations fail to back up crucial data, leaving them extremely vulnerable to corruption. They are faced with a choice of losing the data or paying the ransomware operators a large sum. Therefore, CISOs must recognize the importance of reinforcing critical business data in an evolving threat environment.

The challenge is that while organizations are becoming increasingly aware of data encryption cyberattacks and how to detect, prevent and mitigate them, they are not so clued up on wiper attacks. It is a newer ransomware tactic that IT teams lack the knowledge, resources, and skills to prevent.

Traditional methods of data recovery are not suited to the wiper attacks that security teams are seeing. As a standard, data recovery is usually needed due to site or technology hardware failure.

In a ransomware data corruption attack, it is the data that populates these systems that is being attacked. This means usual cybersecurity practices are not enough to protect organizations from the corruption threat.

They need a fresh approach to evolving ransomware threats to avoid losing crucial business data to corruption.

Grabbing hold of your data

CISOs must be prepared to combat evolving threats head-on, and data corruption is just one of those. It is vital to have a strategy in place that will detect, prevent, and mitigate potential cyberattacks at the earliest opportunity.

One of the simplest methods to prevent data corruption attacks is performing regular backups. It is a crucial part of every cybersecurity team's disaster recovery plan. If a data corruption attack were to take place, organizations with backed-up data would not lose their data or have to pay up to attackers. It is also important to do these back-ups regularly so that the data is refreshed and up to

date. Cybersecurity teams need greater visibility into the activity occurring on endpoint devices, such as desktops and servers. With software in place that looks beyond log sources and hones in on rich endpoint data, cybersecurity teams are empowered to detect and respond to threats faster.

A user-aware file integrity monitoring system (FIM) can continuously monitor all files and easily detect who has changed what. By integrating this software with an existing SIEM solution, organizations can gain more control over their data and achieve new levels of visibility. This can include:

- Viewing User and File History Holistically – The cybersecurity team can quickly pivot file access and view a full timeline of activity including both FIM and behavioral information.
- Enriched Security Analytics - Data generated by FIM can be used to solve new use cases for user & entity behavior analytics (UEBA) and endpoint threat detection.
- Identifying Abnormal Behavior – Teams will be able to receive alerts on anomalous user activity related to important files and minimize false positives by corroborating with other data.
- Alarms for Unauthorized Changes – Alarms can be enabled for unauthorized changes to sensitive files and registry settings whether they are caused by an attacker or internal error.

Organizations should integrate this technology into existing security systems such as a security information and event management (SIEM) solution to ensure data corruption ransomware attacks are prevented right from the start.

To simplify and reduce the number of products in your security stack, some SIEM solutions offer a FIM add-on.

With increased visibility and greater control, critical business data is more manageable and less likely to get forgotten about. CISOs need to simplify everything as much as possible and have integrated security solutions to truly combat the threat landscape of today, and tomorrow.

Rapidly evolving ransomware

Without a doubt, ransomware attacks will become more advanced, and organizations will need to do more to keep their data safe. It will become crucial to prepare for what is ahead, rather than just what is happening now.

As data corruption becomes a more popular ransomware attack, CISOs will need to increase the security of both the original data and backed-up files. With a FIM solution, organizations are setting themselves up for an easier approach to attack mitigation and will quickly be able to update and adapt systems when needed.

Ransomware attacks will continue, but lack of data security must not.

The channel in 2023: Security, safeguarding and spending

Cybercrime is on an upward trajectory, with ransomware posing a substantial threat to both individuals and businesses. The Veeam Data Protection Trends Report 2023 revealed that 73% of businesses in the UK and Ireland (UK&I) experienced at least one attack over the past 12 months, with as many as 18% suffering four or more.

BY ALEX WALSH, CHANNEL AND ALLIANCES DIRECTOR UK & IRELAND, **VEEAM**

AS PURSE STRINGS TIGHTEN and the technology industry faces pressure to reduce spending, one thing is clear, organisations cannot afford to reduce their cybersecurity spend. If they were to cut such budgets, they would struggle to manage the rising threat levels and run the risk of leaving themselves exposed to malicious actors. Fortunately, recent findings from market research firm Canalis predict that spending on cybersecurity services will increase by 14% to \$144.5 billion this year, with larger enterprises and governments leading the charge.

This supports Veeam's finding that UK&I businesses plan to increase their data protection budget by 8.4% this year. With cybersecurity services set

to become one of the biggest growth areas for the channel this year, this provides a significant opportunity for the channel ecosystem to work closely with end-user organisations to help them make investments that reinforce and enhance their overall security.

Plugging the protection gap

Modern businesses are interconnected organisms, and as such it's vital they do all they can to protect themselves, their customers and partners, including adopting Modern Data Protection approaches.

Vendors reliant upon the channel for success invest time developing the competencies and skills of their partners. Hence, making use of the channel ecosystem offers organisations access to incomparable expertise and insights that can help define their future approaches to data protection and find the modern solutions to perfectly suit their needs. There is clearly a need for enhanced data protection and security processes, as the Veeam Data Protection Trends Report 2023 demonstrates a disconnect between how quickly a business needs its systems and data to be recoverable after an attack such as ransomware, and how quickly this happens in reality. Depressingly, this 'Availability Gap' was reported by 83% of UK&I firms.

Leveraging the expertise of channel partners can help businesses better define their approaches to data protection. Deploying appropriate solutions that align with organisational recovery needs should reduce the Availability Gap, as well as its companion problem, the 'Protection Gap.' 81% of UK&I firms experience a Protection Gap between how much data a company can afford to lose in the event of

an incident, including a cyberattack, compared with how frequently IT protects its data. Implementing secure, immutable backups in line with the 3-2-1-1-0 rule (which states that two copies of the data should be stored on two different media, one being offsite, one offline, air-gapped or immutable, all with zero errors) is a key aspect of defence against ransomware. The Veeam Ransomware Trends Report 2022 found that 88% of ransomware attacks in EMEA targeted backup repositories last year. With 74% of these attempts being successful, this proves the need for the enhanced data protection capabilities that channel partnerships can provide.

The value of channel expertise

The channel ecosystem gives businesses access to unrivalled expertise and knowledge. Each network contains a mix of various partner profiles and roles, such as cloud and service providers, SIs, VARs and more. The benefit of this is that no data protection challenge a business is facing will be new, and there will be the expertise available to solve it. Gartner has predicted a 2.4% increase in global IT spending this year, with IT services spend set to grow by 5.5% in light of the challenging labour market. WEF research supports this, revealing that 59% of global organisations find it difficult to respond to cybersecurity incidents due to skills shortages within their teams, with the cybersecurity skills gap widening by 26.2% last year.

This lack of expertise is making it harder for organisations to identify threats, and put adequate data and cyber protections in place, as well as increasing their risk and likelihood of suffering security breaches, and compromising recovery. Fortunately, in recognition of these challenges, UK&I businesses told Veeam that they intend to spend 8.4% more on their data protection budgets too.

Channel expertise can be critical in ensuring this increased spend is invested correctly to help client organisations meet their businesses needs for enhanced cybersecurity and resiliency. Partners are able to help fill talent gaps with relevant expertise, offering organisations the freedom to outsource an increased percentage of their security requirements and focus on other business priorities, with the peace of mind that their data is protected. Better still, their experience helps IT leaders identify the optimum solutions for their needs, whatever infrastructure(s) their data runs across.

Partnering for security and efficiency in 2023
In a multifaceted, interconnected world, vendors and channel partners must work together so that their customers are able to use every tool at their disposal to ensure the ongoing resilience, security



and recoverability of their data and infrastructure. Skills shortages, budget cuts and economic uncertainties are preoccupying the minds of many business leaders. However, with cyberthreats like ransomware that are not a matter of 'when' or 'if,' but 'how often' businesses will be targeted, they can't afford to take their eye off the ball when keeping up with the expanding threat landscape. Anticipating threats and ensuring immediate, fast recovery from a secure, immutable backup is a vital defence against ransomware. Channel partners expertise is also invaluable in building solutions that enable businesses to close their data protection, availability and skills gaps.

Ransomware, including prevention and remediation, is the biggest hindrance to digital transformation and IT modernisation for almost 40% of UK&I businesses, according to Veeam's research. Channel partners can help relieve this burden, by positioning themselves as strategic technology partners, focused on driving digital transformation initiatives that will help businesses improve their operational efficiency. Alongside helping clients to modernise their production environments, they can help them modernise data protection too. Leading them to solutions that can manage all workloads, whether cloud, virtual, physical, SaaS, Kubernetes or a mix, enabling them to break free from legacy backup arrangements or vendor lock-in.

Such data freedom brings agility, a key factor for innovation and growth – for the channel and customers alike. Thus, not only does the right data protection solution thwart the cyber attacker, and protect loss of customers, profits or reputation – it can help build them up too.

It's 2023 and product management is in

More IT organisations are adopting digital transformation and Agile project management to increase delivery speed, reduce costs and deliver on business priorities. However, those still using a waterfall mindset and who are using Agile to run projects, not products, will always be left behind. Here **LOUISE CERMAK, PRINCIPAL CONSULTANT AT AGILE CONSULTANCY CATAPULT.CX**, explores why shifting to a product mindset will help business scalability in 2023.



THE TRADITIONAL plan-build-run model that involves diving IT into three separate units, far removed from the business and customer, has been an industry staple for the past 30 years, but is not a contemporary solution.

Mik Kersten PhD, author of “Project to Product: How to Survive and Thrive in the Age of Digital Disruption with the Flow Framework”, commented that this traditional IT project management discipline is usually insufficient for meeting today’s software development needs. He goes on to explain that an ill-fitting managerial paradigm and measurement method can derail even the most well-resourced and strategic projects. Nevertheless, a shift to a product-aligned organisation is no less daunting, but businesses can take a series of steps to ensure a smooth transition.

New year, new team

The first step is to create cross-functional product teams in IT, bringing together those working in SysOps, business ops, development, sales, marketing and management, and integrating them. Rather than existing in silos, this approach breaks down internal barriers and facilitates cross-collaboration towards one common goal.

When establishing new product teams, businesses should be wary of numbers. Including more than ten people in one team is an anti-pattern. Usually, larger teams are associated with monolithic applications, which other applications are dependent upon. These often have complex waterfall testing cycles, which create bottlenecks. Instead, product teams must be empowered to decouple the monolith and split into smaller, autonomous services.





The new product team structure allows businesses to remove the constraints of the old portfolio and project management processes and tools. Continuing with legacy processes and mindsets is no longer an option.

Governance

Agile product and portfolio governance often determines an organisation's value. If implemented correctly, Agile governance can empower autonomous teams, deliver effective processes that improve speed to market, improve product quality via increased collaboration and reduce risks. Meanwhile, all decisions are aligned to core business objectives.

Standardising adoption of Agile principles is essential for managing internal governance and decision-making. Effective governance relies on key Agile and software engineering disciplines, which means deploying them in the most productive way possible.

When standardising, there are various things IT organisations can do. These include implementing a community of practice (CoP), starting with an Agile and Continuous Integration/Continuous Delivery (CI/CD) approach to drive consistency in the new

product team. Encouraging teams to collaborate and focus on customer value and consolidate learnings from previous Agile initiatives is also helpful.

Product management

With IT businesses reassessing their priorities for this year, effective product management can help them achieve value by developing products that deliver on objectives. However, the financial planning and budgeting can create tension in product management, where change is not aligned to business goals and teams revert to siloes. Not only does it impact speed to market, it also erodes value to the organisation and customers.

We recommend a series of steps when moving closer to product alignment. These include implementing agile funding for product backlogs, empowering new product teams to manage demand and prioritising value and identifying an Agile and product management champion in the finance team. IT firms have a desire for change and shifting to a product, rather than project, mindset can help them improve scalability by breaking down internal walls and reinforcing collaboration. Working with an Agile consultancy like Catapult is a good first step when planning their approach and can help streamline this transition.



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Maximizing business performance: overcoming cloud repatriation challenges and optimising IT modernisation

As Amazon, Microsoft and Google continue their stronghold on the cloud market, businesses seeking enhanced agility often face limited options.

ROB SMITH, CTO AT CREATIVE ITC, the award-winning cloud services provider, shares insights on how IT leaders can tackle challenges in cloud repatriation and IT modernisation to elevate business performance.



HYPERSCALERS account for more than £4 in every £5 spent on public cloud services in the UK between them. They're also growing at a faster rate than smaller cloud providers who are facing a dwindling collective share of this fast-growing market. It's no surprise, therefore, that vendors are increasingly focusing their efforts on public cloud technologies from these three big players. From NPD and solution development to leasing and consumption models, everything is becoming more and more geared towards public cloud.

Many MSPs aren't in a position to do anything other than offer clients public cloud solutions – meaning cloud selection is frequently limited on alternatives for businesses, and innovation in cloud services is increasingly hampered. Whether this lack of competition is good for IT leaders as they continue to wrestle with digital transformation programmes is debatable and the subject of an ongoing Ofcom investigation.

Yet, despite this monopoly, cloud repatriation has begun to snowball as companies evolve their cloud strategies, having experienced both the benefits and shortcomings of public cloud adoption. For IT teams seeking to modernize and right-size their IT infrastructure to better align with evolving business needs and budgets, retrieving applications or workloads from public clouds and moving them elsewhere is increasingly being recognized as a valuable strategy.

Unlocking business benefits

As rising energy costs and economic volatility bring budgets under pressure, organisations are looking for new 'save-to-invest' strategies, releasing cash for projects linked to growth. Reducing day to day IT costs is the major driver of cloud repatriation decisions. If CIOs can drive down operational costs, this opens the doors to project spend on innovation and moving the business forward.

Greater cloud consumption equates to higher operating costs and there's wider understanding now of 'hidden' costs associated with public cloud adoption, such as significant data egress charges. While it's quick and easy to purchase public cloud storage, many have found the attractive entry prices are a fraction of what they end up paying. Public cloud giants Microsoft, Amazon and Google have been blasted by Gartner for their aggressive pricing to lure in customers. So, it's no wonder that 96% of IT leaders who moved workloads or applications away from public cloud providers cited cost efficiency as the main benefit.

Compliance requirements, security and data locality concerns are also prompting many businesses to repatriate workloads. 95% of organisations said their security posture had improved as a result of moving away from public cloud. In addition, there's a growing number of firms choosing to migrate

HYPERSCALE
DATA
CENTER



specific apps from hyperscale providers to another location, which enables them to achieve better execution and performance. 85% organisations noted better management control and business agility as a result.

De-risking IT modernisation

But migrating apps and modernising legacy IT systems is by no means a straightforward task. Many firms find themselves exposed to old software that's ever harder to scale, integrate, maintain and secure. Specialist apps may have been developed using ancient code by people no longer with the company, and each app may be separately licenced and hosted from multiple servers and virtual machines. IT teams have struggled with software modernisation due to lack of internal skills and resources, complex integration and testing and prohibitive costs.

Although innovation is hampered by the continued dominance of public cloud offerings from the hyperscalers, specialist providers are now developing new solutions to help companies futureproof their IT and facilitate digital transformation. To help firms overcome challenges faced with modernising IT systems, Creative's Modern Application Platform (MAP) is designed to de-risk legacy system updates while stretching budgets using advanced Kubernetes and containerisation technologies. MAP provides organisations with a single-stop solution for updating older software to the very latest languages and frameworks, while carefully arranging and simplifying often scary and costly cloud transitions. Companies also benefit from a simple consumption model, reducing costs and modernisation lead times and releasing internal IT resources for impactful strategic innovation projects.

Accelerating innovation

To achieve their business goals sooner, organisations are increasingly turning to partners with expertise around the re-siting of applications and workloads from public cloud environments. With skilled teams offering fully managed services,

specialist providers make it easier and more cost-effective for firms to switch to new cloud solutions and adapt to fast-changing market conditions to leverage competitive advantage. MSPs are better placed to advise on key repatriation considerations such as whether to deploy a private, hybrid or multi-cloud setup, or leverage an external co-location facility. They can also help in-house IT teams address data governance and security policies, which inevitably differ across industry sectors and geographies.

As digital transformation gathers pace across all industry sectors, there's mounting pressure to make IT simpler to manage and less costly to own and operate. Infrastructure-as-a-Service models for elements like storage, networking and compute, are increasingly being applied to stretch IT budgets and resources to accelerate innovation. Savings on infrastructure, data centre space, licensing, support and headcount also offer a welcome balance sheet boost.

In the transition towards Everything as a Service (XaaS) IT models to boost business agility and efficiency, firms must tread a careful path to ensure solutions not only align with future needs but also dovetail seamlessly with existing IT systems. Digital transformation journeys are growing ever-more complex and difficult to navigate. Hot on the heels of infrastructure virtualisation, application virtualisation is now snowballing. Yet compute and storage – and therefore virtualisation – are coming ever closer to the edge. This increases the need for greater workload mobility, automated operations, and improved performance and availability of resources. Firms are increasingly recognizing the value of MSPs with a successful track record in their sector, who are focused on developing solutions to help them to overcome the unique set of industry and technology obstacles. Purpose-built technologies and fully managed services from this new breed of sector IT specialists will be invaluable in accelerating innovation to help businesses stay ahead of the curve.

Strong channel sales propel the cybersecurity market to US\$20 billion in Q4 2022

Total spending on cybersecurity technologies remained robust in Q4 2022, with strong channel-led sales making up for the decline in direct sales. The market grew 14.5% to US\$19.6 billion, which was in line with Canalys' best-case forecast.

SPENDING on cybersecurity technology through the channel grew 16.2% to US\$18.0 billion, accounting for 91.8% of the total market. Direct spend between customers and vendors, which represented the remaining 8.2% of the market, declined 1.8%.

For full-year 2022, total spending on cybersecurity technologies increased 15.8% to US\$71.1 billion, while spending through the channel grew 16.1% to US\$64.6 billion, accounting for 91.0% of the total market. In the latest quarter, network security was the largest category by revenue, growing 8.9% to US\$5.4 billion. Spending on vulnerability and security analytics increased by 18.2% to US\$4.2 billion while identity access management grew 15.6% to hit US\$3.7 billion.

According to Canalys, the largely upbeat results are offset by increasing IT budget constraints that have forced customers to prioritize projects, while additional layers of scrutiny further extended sales cycles. The leading vendors jostled for position in the highly fragmented market, in which the top 12 cybersecurity vendors accounted for 47.1% of total spending during the quarter. Palo Alto Networks remained the leading vendor in Q4 2022.

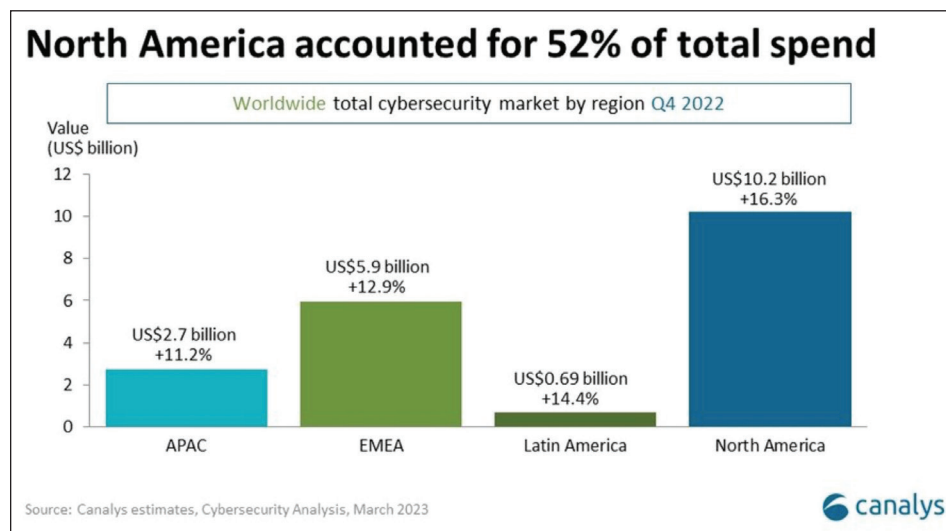
Fortinet moved ahead of Cisco, after shipping more of its mid-range firewall order backlog. Check Point came fourth, though CrowdStrike continued to close the gap. Okta and Microsoft also made gains. "Customer organizations continued to step

up investments to improve their cyber resiliency. Lengthening sales cycles, maturing hardware refresh programs and prioritization of spending will slow down growth in 2023," said Matthew Ball, Chief Analyst at Canalys. "However, cybersecurity remains a priority. Secure services edge, identity access management, cloud security and modernization of security operations centers remain areas of focus." Worldwide cybersecurity leading vendors

"The largest and most successful cybersecurity vendors have used 'land and expand' sales strategies to scale over the past two years and take a larger share of total cybersecurity spending," added Ball. "The development of cybersecurity platforms, by building or acquiring new functionality accessible via subscriptions, have enabled them to land new customers with specific capabilities and expand within accounts through add-on modules.

The mix has shifted more towards expansion over the last two quarters." This places the top cybersecurity vendors in a stronger position to weather the economic downturn and capitalize on customers consolidating their vendor relationships to reduce costs. "But this has also increased average deal sizes, which, in part, contributed to the greater scrutiny of projects and longer sales processes," added Ball.

North America continued to dwarf the other regions in overall cybersecurity spending, growing 16.3% to reach US\$10.2 billion in Q4 2022, representing more than half the global market.



Cybersecurity will be a key theme discussed at this year's first-ever Canalys Forum North America, which will take place in Palm Springs, California on 13-15 November 2023. In Q4 2022 Europe, Middle East and Africa was the second-largest cybersecurity market where spending was up 12.9% to reach US\$5.9 billion. Asia Pacific rose 11.2% to US\$2.7 billion and Latin America grew 14.4% to US\$690 million during the same time period.

Worldwide cloud service spend to grow by 23% in 2023

Worldwide cloud infrastructure services expenditure grew 23% year on year in Q4 2022 to reach US\$65.8 billion, an increase of US\$12.3 billion.

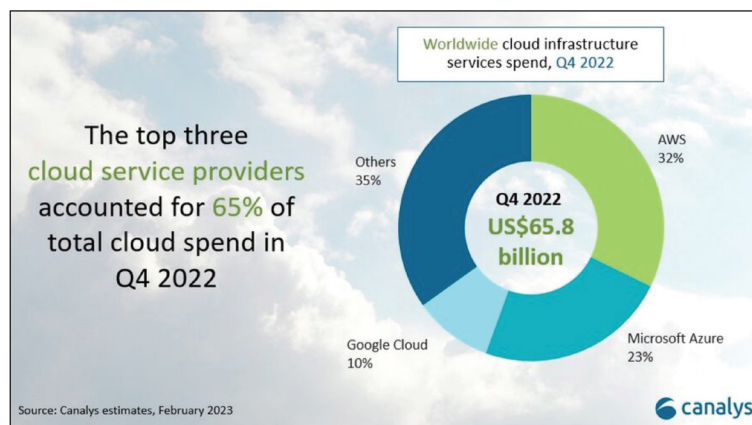
FOR FULL-YEAR 2022, total cloud infrastructure services spend grew 29% to US\$247.1 billion, up from US\$191.7 billion in 2021. The quarterly growth rate slowed, down over 10 percentage points from Q1 2022 (34% in Q1 2022 against 23% in Q4 2022). Rising public cloud costs, fueled by inflation, are forcing enterprise customers to optimize public cloud spend after constant IT investment over the past three years in digital transformation.

Macroeconomic uncertainties are contributing to a more conservative approach to IT budgets. A growing number of customers are adjusting cloud strategies for greater efficiency and control. That includes assessing the repatriation of certain cloud workloads to private or co-location data centers to reduce costs, driving greater adoption of hybrid and multi-cloud strategies. While enterprise demand for cloud services persists, the growth rate for cloud infrastructure services will continue to slow for the next few quarters. In 2023, Canalys expects global cloud infrastructure services spend to increase by 23% for the full year, compared with 29% in 2022.

The realities of worsening macroeconomic conditions and the looming recession prompted a slowdown in the volume and pace of migration to the cloud in Q4, especially by enterprise customers, which typically have larger workloads. The hyperscalers were inevitably affected, with their growth falling by about 5 percentage points from the previous quarter. The top three in Q4 2022, AWS, Microsoft Azure and Google Cloud, collectively grew 26%, to account for a combined 65% share of customer spend.

“Enterprise customers are responding to higher cloud prices and higher-than-expected operating costs under the tough macroeconomic conditions,” said Canalys Research Analyst Yi Zhang. “Customers that are currently on pay-per-use billing models will optimize cloud activities to reduce cloud consumption and save costs. There will also be a considerable slowdown in the take-up of cloud contracts, which will also result in a decrease in associated cloud revenue.”

AWS led the cloud infrastructure services market in Q4 2022, accounting for 32% of total spend. It grew 20% on an annual basis, an all-time low growth rate for AWS, according to Canalys estimates. The decline of enterprise customers’ spending, combined with rising server energy and operating



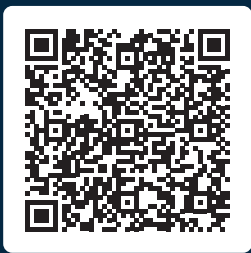
costs, resulted in an increasingly negative impact on its profitability. But AWS continues to actively invest in its channel ecosystems to expand its reach and acquire new customers. This quarter, AWS announced new customer wins with headline names including Nasdaq, Yahoo and Descartes Labs. In terms of capital investment, it launched AWS Regions in Spain and Switzerland, as well as a second Region in India to continue growing AWS’ infrastructure footprint.

Microsoft Azure held 23% of the global cloud infrastructure services market and remained the second-largest provider after growing 31% year on year. Though seeing moderated consumption growth in Azure, its revenue is expected to be steady as its backlog commitment grew to US\$189 billion in Q4 2022. Azure continues to lead the hybrid computing market with Azure Arc as more customers move to hybrid cloud services. It announced that it has more than 12,000 Azure Arc customers, double the number a year ago, including companies such as Citrix, Northern Trust and PayPal. Microsoft is also placing a big bet on AI as a driver of Azure growth, following its announcement as the exclusive cloud provider for OpenAI to run its AI services including ChatGPT, and further integration with ChatGPT expected.

Google Cloud was the third largest cloud service provider, and outpaced both AWS and Azure with growth of 36% year on year to account for 10% of the market. Google Cloud continues to report operating losses, but losses were reduced. Its differentiated products and focused go-to-market strategy are helping to drive customer momentum. Google Cloud committed to deeper engagement with its channel partner community to drive growth in 2023.

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Backup job failed: Plan Name: Daily
Workstation Image: 08/04/2022 8:00 PM

