

A Canalys Special Report for  **opentext™**

OpenText Partner Ecosystem Multiplier study

July 2025

Contents

1. Executive summary	3
Study outline	3
Research methodology	3
Partner Ecosystem Flywheel	4
Key findings.....	5
2. OpenText Partner Ecosystem Multiplier	6
Overview	6
Partner categories	7
Focused	7
Multi-category	8
Progressive	9
Expert	10
Multiplier over time.....	11
3. Flywheel breakdown	12
Advise.....	12
Design	13
Procure	14
Build.....	15
Adopt	16
Manage.....	17
4. Summary	18



1

Executive summary

Study outline

The IT market is increasingly shifting from best-in-breed to best-in-integration. Through acquisition and in-house development, OpenText has built a suite of cloud-first products that are highly-rated and integrate well with other top vendors, especially Microsoft. OpenText's product suite and strong support allows partners to build a full services stack, enabling them to be with customers throughout the entire technology lifecycle. As a result of this strategy, OpenText has a robust partner ecosystem that enables partners to generate significant revenue from incremental services and solutions tied to OpenText products well beyond the initial procurement. To help OpenText identify its **Partner Ecosystem Multiplier (PEM)**, Canalys conducted an in-depth study focusing on the diverse ways partners can add and gain value by working within the OpenText ecosystem.

This study uncovers the value of the OpenText PEM and examines component breakdowns as well as variations across partner types. The study reveals that partners can achieve up to a US\$6.73 multiplier for every dollar a customer spends on OpenText solutions, with the most mature "Expert" partners capturing the full potential of this opportunity. Partner engagement, business models and capabilities were all considered when assessing the OpenText PEM. Multiple factors affect the PEM, including breadth of offerings, maturity of partner, complexity of service offerings, scale of partner and local market dynamics (geographic factors).

It is important to also highlight that **the Multiplier reflects the revenue opportunities** that partners can capture with their services and solutions in relation to customer spend on OpenText technology, as opposed to margins or profitability. Any insights related to profitability will be specifically highlighted.

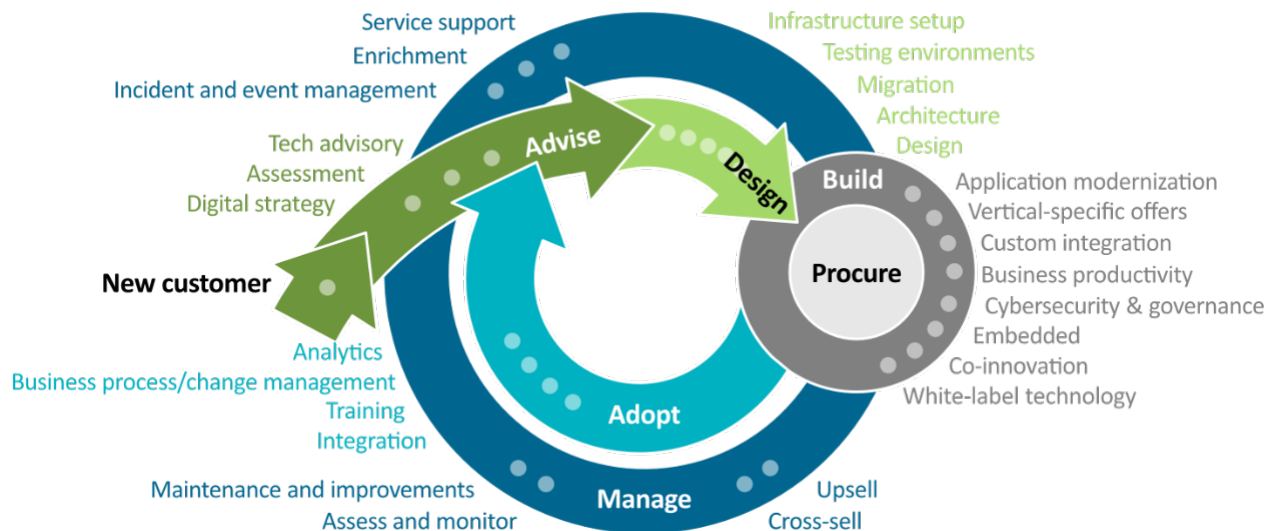
Research methodology

Canalys conducted interviews with 18 hand-picked OpenText partners. The partners were selected by OpenText to ensure the participants represent a strong sample of the business potential within the OpenText ecosystem. Interviews were conducted with various partner types, including resellers, managed service providers (MSPs), systems integrators, and service providers. The study was primarily conducted in the United States, with 16 partners from the US (seven from Southeast USA, six from West-Central USA, and three from Northeast USA) and two partners from the UK. Each interview provided insights into the partner's business model, service offerings, and experiences working with OpenText. The data gathered from these interviews was fed into a Canalys PEM model to help construct an aggregated view of the total multiplier captured, as well as understanding how the multiplier was spread over time and by partner activity.



Partner Ecosystem Flywheel

To help illustrate the range of service opportunities that partners are offering, Canalys leveraged its **Partner Ecosystem Flywheel**. The Flywheel is a key visual of the PEM that serves two broad purposes. First, it shows the range of service activity types (shown below) that are typically delivered by partners when engaging in a customer technology deployment. The multiplier value is broken down into these activity types.



Second, it serves as a visual aid to help understand where partners play across the customer technology lifecycle. Partners that engage across all activities of the Flywheel are better positioned to create the “spin” effect with customers, thus yielding further opportunities in the future.

- **Advise services** capture the consulting and professional services activities held either with new customers or existing customers that are embarking on new transformation projects. This typically involves an understanding of a customer’s digital strategy (or the required outcomes for a particular project), an assessment of the existing infrastructure and systems, as well as an advisory on the specific technology solutions that need building or procuring.
- **Design services** capture the activities required for customers to establish or expand their environment. This involves designing and testing the environment that will be used and ultimately migrating customer data onto the public cloud infrastructure.
- **Procure services** are the activities that partners conduct to acquire the necessary infrastructure for setting up cloud environments. Revenue from these activities typically occurs in the form of resell or through procurement services offered by partners.
- **Build services** are the broadest and most diverse set of services within the Flywheel. Inclusive of industry and functionally focused software stacks, these services leverage the widest variety of partners within the ecosystem. This segment also includes a partner’s own IP creation and software development, for example, as part of a customized solution.
- **Adopt services** can be understood as the services that allow partners to help customers use and unlock value from their investments. This could be in the form of ongoing customer success engagements or dedicated workshops to train

customers in use. Business process and change management services allow partners to fine-tune these environments depending on customer demand, while data analytics are leveraged to identify opportunities, both for efficiency and further revenue in the future.

- **Manage services** are the end goal for many partners' projects and are by far the most operational of the services featured within the Flywheel. They can also be a key revenue driver as they offer an opportunity for consistent recurring revenue beyond the initial set-up of the environment.

Key findings

OpenText partners can achieve a US\$6.73 multiplier per US\$1 of OpenText sold. Partners achieving this level of multiplier are highly mature in Manage services and earn enterprise-level business.

35.1% of the multiplier occurs in year three of the project, which highlights the significance of **Manage services** in driving the overall PEM.

76.8% of the OpenText multiplier occurs post-implementation, highlighting the significance of a long-term Manage, Build, and Adopt strategy for partners looking to capture the maximum available OpenText PEM.

23% of OpenText partners are currently considered "expert" partners, and are mature across all categories other than Advise and span the entire customer lifecycle.

84.6% of interviewed partners bundled Microsoft with OpenText. Partners of all sizes are winning enterprise-level business due to their complex, integrated offerings, boosted by strong OpenText support.

"OpenText support is second to none. It's been so consistently strong for years and years. They've always felt like a true partner, not just another vendor relationship. They're in it with us."

MSP, Southeast USA

Key benefits for partners

For partners considering joining the OpenText ecosystem:

- **Immediate revenue potential:** Leverage OpenText's comprehensive product suite to create diverse service offerings from day one, which allows for deep customization for specific industries.
- **Exceptional support structure:** Benefit from OpenText's industry-leading support team that provides both technical assistance and strategic guidance.
- **Partner enablement for smaller partners:** Even smaller MSPs can effectively compete for and service enterprise-level clients with OpenText's support.

For existing OpenText partners looking to maximize their multiplier:

- **Service expansion opportunities:** Transform project-based income into sustainable recurring revenue streams through comprehensive service offerings.
- **Bundling advantages:** Increase profitability by combining Microsoft and OpenText solutions with managed services. OpenText bundles significantly reduce deployment time and complexity.



2

OpenText Partner Ecosystem Multiplier

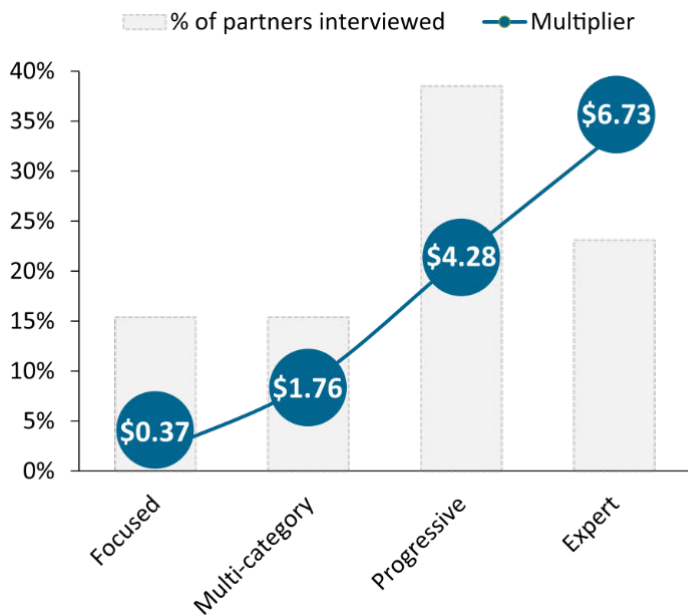
Overview



The OpenText partner ecosystem demonstrates significant maturity, with partners able to capture substantial revenue opportunities across the customer lifecycle. The study identified a maximum multiplier of **US\$6.73 for every dollar spent on OpenText solutions**, achieved by the most mature “Expert” partners. The partners that achieve this multiplier provide a breadth of services across the customer lifecycle, guiding customers through complex digital transformations and leveraging their position to drive a managed services offering.

The multiplier’s strength is tied to the maturity and diversity of partner services, which signals not only the strength of OpenText as a product but also the depth of services needed by partners selling OpenText solutions. **Manage services make up 58.6% of the multiplier**, while Advise, Build, and Procure services combined account for just 9% of the total multiplier. Due to the ecosystem’s emphasis on Manage services, **35.1% of the multiplier occurs in year three**. Only 30.6% of the multiplier occurs in year one due to many partners not directly billing for Advise services, instead including them at no cost in a Manage contract.

Overall, Canalys has identified four distinct partner categories within the OpenText ecosystem. These categories are **Focused, Multi-category, Progressive** and **Expert**. The US\$6.73 multiplier was achieved only by Expert partners. This section will explore the defining features of the three partner categories, as well as how the multiplier varies across these categories.



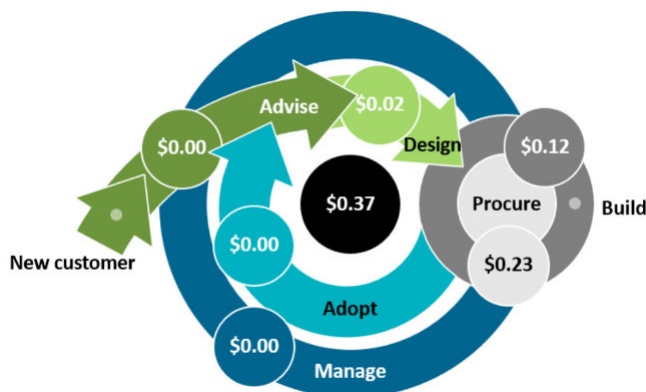
Partner categories

Across the four categories Canalys identified, the key differentiating factor is the level of maturity that a partner possesses when it comes to its shift toward a services approach and, therefore, **the breadth of services** a partner can provide. In this study, 23% of partners were placed in the **Expert** category—those able to achieve the full US\$6.73 multiplier. 46% of partners fell into the **Progressive** category, the second-most mature category, earning a multiplier of US\$4.28. These partners constitute the majority of the OpenText ecosystem and are mature in Manage services, but lag behind Expert partners in Adopt. **Multi-category** and **Focused** partners, the least mature partner categories, each accounted for 15% of the ecosystem. This indicates a

highly mature OpenText ecosystem. While multi-category partners are beginning to engage in Manage services, Focused partners are limited to solely resale and basic integration services, and are not capturing substantial post-procurement revenue.

Focused – multiplier of US\$0.37

Focused partners, representing 11% of those interviewed in the study, typically have a multiplier of US\$0.37. These partners typically lack maturity in all segments outside of Procure and Design, as they are limited to reselling OpenText and Microsoft through OpenText. While their specialized knowledge provides value in specific scenarios, their inability to offer broader services restricts their revenue potential. Focused partners often serve as the initial touchpoint for customers entering the OpenText ecosystem but lack the capabilities to support customers through more complex implementation and management phases.



Focused partners represent the entry point into the OpenText ecosystem. As a result of their narrow scope

of services, they are not perceived by customers as capable of driving complex business transformation projects. This perception can be difficult to change, but working with other partners in a co-sell or even a co-delivering motion can be a key step in changing the minds of these customers. When it comes to a services-first approach, though, perception shifts will take time and significant investment to ultimately earn customer trust. By leveraging OpenText bundles and programs, some Focused partners have already begun to make the necessary investments to facilitate this shift.

"Unlike most other partners at OpenText, we're not an MSP as a primary business. It's not even our secondary business, it's our tertiary business. We focus on [reselling] ERP and CRM solutions... however, the demand for managed services is becoming more and more prevalent."

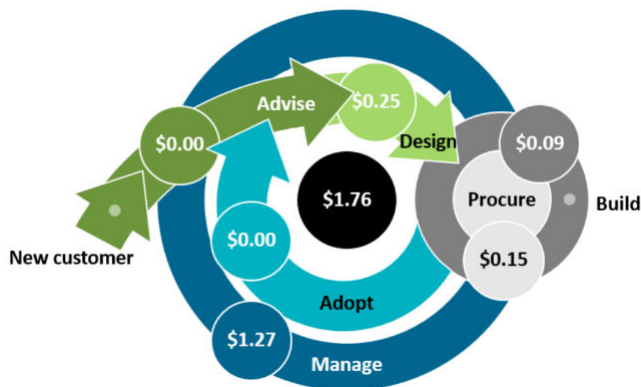
Reseller, Southeast USA

To advance from Focused to Multi-category status, partners should:

- **Develop manage services:** Start by offering simple monitoring and maintenance services for OpenText implementations.
- **Leverage OpenText bundles:** Utilize pre-packaged solutions to simplify deployment and reduce technical barriers.
- **Build strategic partnerships:** Collaborate with more mature OpenText partners on joint projects to gain experience and credibility.
- **Invest in technical training:** Develop deeper expertise in OpenText products to support more complex implementations.

Multi-category – multiplier of US\$1.76

Multi-category partners have begun expanding their service offerings beyond basic resale, achieving a multiplier of US\$1.76. These partners operate primarily within managed and resale offerings but have started to develop a broader portfolio aligned either vertically or technically. Their expanded capabilities allow them to capture more revenue throughout the customer journey, though they still fall significantly short of the full potential multiplier.



By diversifying their offerings, Multi-category partners can address more customer needs and establish stronger, more enduring relationships. These partners have recognized the value of service expansion but are still in the early stages of developing comprehensive service capabilities. Their revenue streams typically come from a combination of resale margins and basic managed services, with limited engagement in more sophisticated design, build, or advisory services. Multi-category partners represent a transitional stage in the partner maturity model, demonstrating the initial steps toward a more service-oriented approach. These partners are active in the Build segment, which accounts for 14.2% of their multiplier activity. This means they are beginning to take advantage of OpenText bundles and engaging in more complex integrations.

The cost of increasing the breadth of services within a shifting ecosystem may be challenging, but partners that took part in this study highlighted clear and significant returns on the investments that they have already made. To continue their expansion, Multi-category partners that grow Adopt and Build capabilities will be able to take greater control over a customer's digital transformation journey, and thus generate increased multiplier opportunities for themselves.

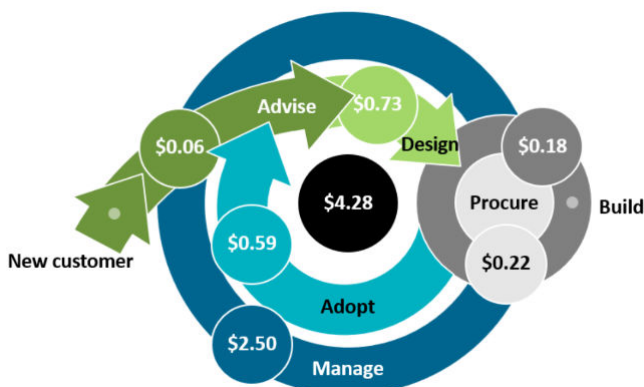
"I'm very new to OpenText. A rep found me and I saw the value of having a one-stop shop to manage my Microsoft 365 licensing, my OpenText email encryption, etc. Having the team at OpenText to support me is critical: calling out to Microsoft by yourself as a small MSP can be hard."

MSP, Northeast USA

To advance from Multi-category to Progressive status, partners should:

- **Expand service portfolio:** Develop capabilities in the Build and Design segments of the flywheel.
- **Standardize OpenText bundles:** Increase operational efficiency by standardizing deployment and support processes.
- **Develop vertical expertise:** Focus on specific industries to deepen understanding of customer business challenges.

Progressive – multiplier of US\$4.28



Progressive partners have substantially developed their portfolio of offerings to include Build and Design services, achieving a multiplier of US\$4.28. These partners have made significant investments in expanding their technical capabilities and service offerings, allowing them to capture a much larger portion of the potential revenue opportunity. While they remain developing in Adopt services, their broader service portfolio enables them to engage more deeply with customers throughout their OpenText implementation journey.

Representing 46% of the partners interviewed, they are moving beyond standard implementations. Progressive partners look to support in overall digital strategy and are actively increasing their emphasis on Adopt services, particularly in complex multi-vendor projects. Neither Focused or Multi-category partners are generating any revenue in this segment. Progressive partners have made the significant shift towards diversification of services, which drove a 242% increase in the overall PEM for partners of this category.

The Progressive partner category represents a critical transition point in the partner maturity model, where partners have successfully evolved beyond transactional relationships to become valuable implementation and support partners. These partners typically have established professional services organizations capable of handling complex projects, though not at the scale of Expert partners. Progressive partners often leverage training as a significant part of their Adopt revenue stream, which allows them to expand and drive their overall PEM opportunity. Their ability to combine technical expertise with service delivery creates substantial value for customers and generates significantly higher revenue compared to less mature partner categories.

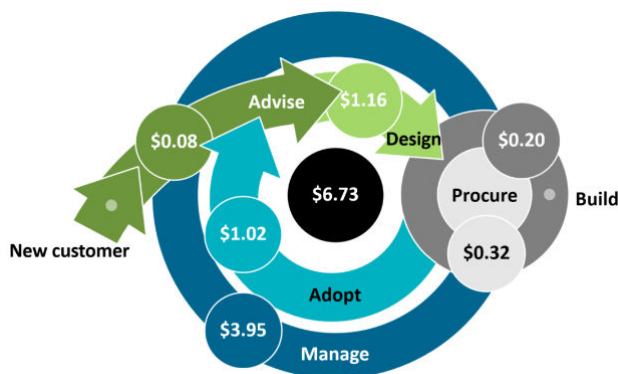
"MSPs have to have a really good relationship with their vendor. You have to have somebody that you can reach out to at any time to have transparent discussions about the products. OpenText has done a really good job at that. We've been working with our contact for five years and they are always following up, always available, and very knowledgeable."

MSP, Northeast USA

To advance from Progressive to Expert status, partners should:

- **Develop comprehensive adopt services:** Invest in training, business process change management, and analytics capabilities.
- **Build strategic advisory capabilities:** Position as a trusted advisor for digital transformation initiatives
- **Leverage OpenText support:** Utilize OpenText's technical and strategic expertise to tackle more complex enterprise-level projects.

Expert – multiplier of US\$6.73



Expert partners are the most mature of the OpenText partner ecosystem, achieving the full multiplier of US\$6.73. These partners have the most diversified offerings and typically maintain large professional services organizations with resources to tackle large and complex projects. Expert partners span the entire customer lifecycle, demonstrating mature capabilities across all service categories except Advise, where even the most sophisticated partners show room for growth.

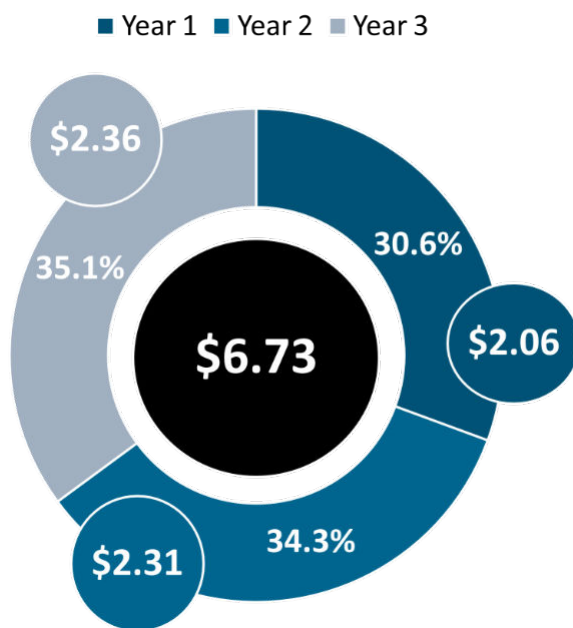
With significant control across the digital transformation journey, Expert partners can capture a Manage value 158% higher than Progressive partners. Their comprehensive approach allows them to guide customers through their current environments and identify potential use cases beyond initial project scope, creating vital upselling opportunities. Expert partners differentiate themselves through their ability to influence customer decision-making at the start of the journey and maintain long-term relationships through managed services. Their sophisticated service delivery model and deep technical expertise enable them to maximize revenue across all segments of the partner ecosystem flywheel, making them the most valuable partners in the OpenText ecosystem.

Despite partner maturity, opportunity to expand the total PEM still exists for Expert partners, particularly in the Advise segment. The Advise service segment multiplier remains low as Expert partners are including consulting at no additional cost in their large-scale implementation and managed services contracts. Expert partners are highly reliant on Manage services to drive recurring revenue in years two and three. The size of Expert partners allows them to scale their Manage services offerings to meet the needs of their customers. To capture multiplier growth, Expert partners need to invest in growing their Advise capabilities.

"My goal has been to simplify our offerings. That has helped us move our business up the stack, which makes it less about reselling individual pieces and more about buying a solution. Getting our company as deeply integrated with all of our offerings as possible is how we cross-sell and up-sell, and how we've captured consistent growth." **MSP, West-Central USA**

To maximize their multiplier potential, Expert partners should:

- **Formalize advise services:** Develop dedicated consulting offerings that can be billed separately from implementation and managed services.
- **Expand cross-selling capabilities:** Leverage deep customer relationships to identify additional OpenText solution opportunities.
- **Build centers of excellence:** Establish dedicated teams focused on emerging technologies and integration opportunities.



Multiplier over time

The OpenText Partner Ecosystem Multiplier study modeled a three-year customer journey to accurately reflect customer usage patterns and partner activity. This temporal analysis reveals important insights about how revenue opportunities evolve throughout the customer lifecycle. In the first year, partners typically focus on implementation and setup activities, with Design services representing a significant portion of the revenue. As the relationship matures in years two and three, the revenue mix shifts toward managed services and ongoing support, creating a sustainable revenue stream for partners.

The distribution of the multiplier across the three-year period underscores the importance of long-term service strategies for partners. While initial implementation generates substantial revenue, the ongoing management and support services represent the majority of the total multiplier value. Partners who successfully establish themselves as trusted advisors during the implementation phase can leverage this position to

secure recurring revenue through managed services contracts. This pattern highlights the evolution from project-based revenue to relationship-based revenue, with the most successful partners effectively managing this transition to maximize their total multiplier value over the full three-year period.

While Canalys modeling for this study is based on a three-year model, it should be noted that recurring revenue from these customer projects often extends beyond year three. This expansion of revenue is not simply limited to increased managed services revenue. By offering a services capability across the Adopt and Build segments, partners can capture potential new or increased scopes and create further multiplier revenue as a result. Partners with limited post-procurement services capabilities are likely to be missing out on the expansion upsell and cross-sell opportunities that are being captured by their competitors.

"We chose OpenText because of their support. If I have a problem or question, I get the answer immediately. No other vendor I work with offers the same level of support. The addition of peer groups and trainings has also been fantastic."

MSP, West-Central USA

To maximize revenue across the three-year customer journey, partners should:

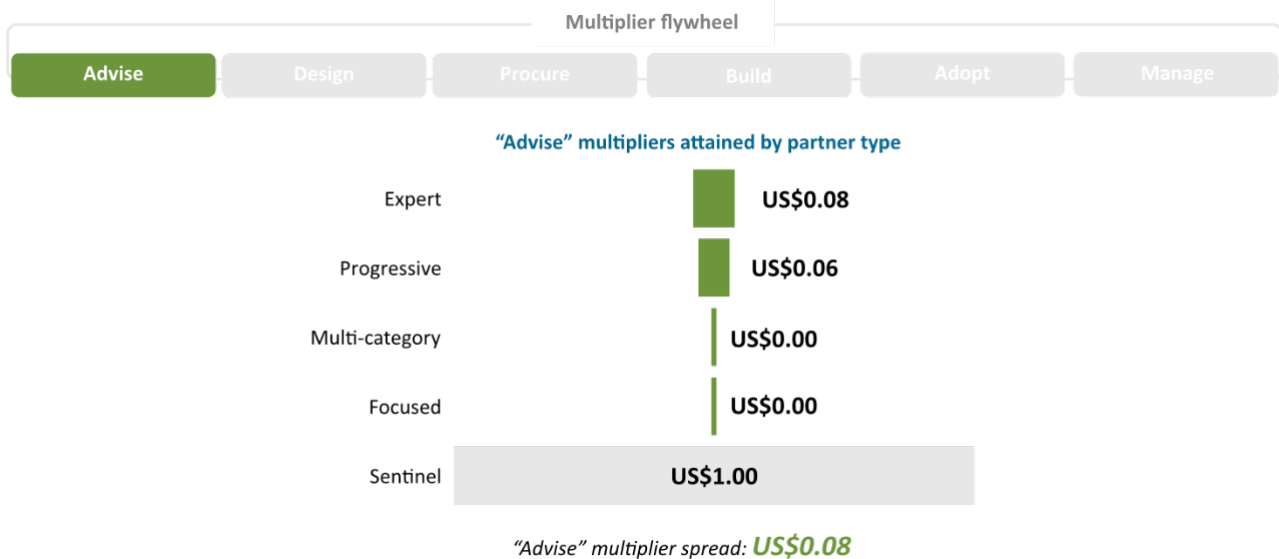
- Establish trust through exceptional implementation and design services while laying groundwork for managed services.
- Transition from project-based to relationship-based revenue by expanding service agreements and identifying optimization opportunities.
- Leverage established relationships to introduce additional OpenText solutions and services that address evolving customer needs.
- Develop contract renewal strategies that incorporate technology refreshes and expanded service offerings.

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Flywheel breakdown

Advise

Advise services represent US\$0.08 or 1.2% of the total multiplier, making them the smallest component of the partner ecosystem flywheel. These services include consulting activities that prepare customers for their OpenText use, helping them understand how the technology can address their specific business needs. Despite their small direct contribution to the multiplier, Advise services play a crucial role in setting the foundation for successful implementations and establishing partners as trusted advisors.

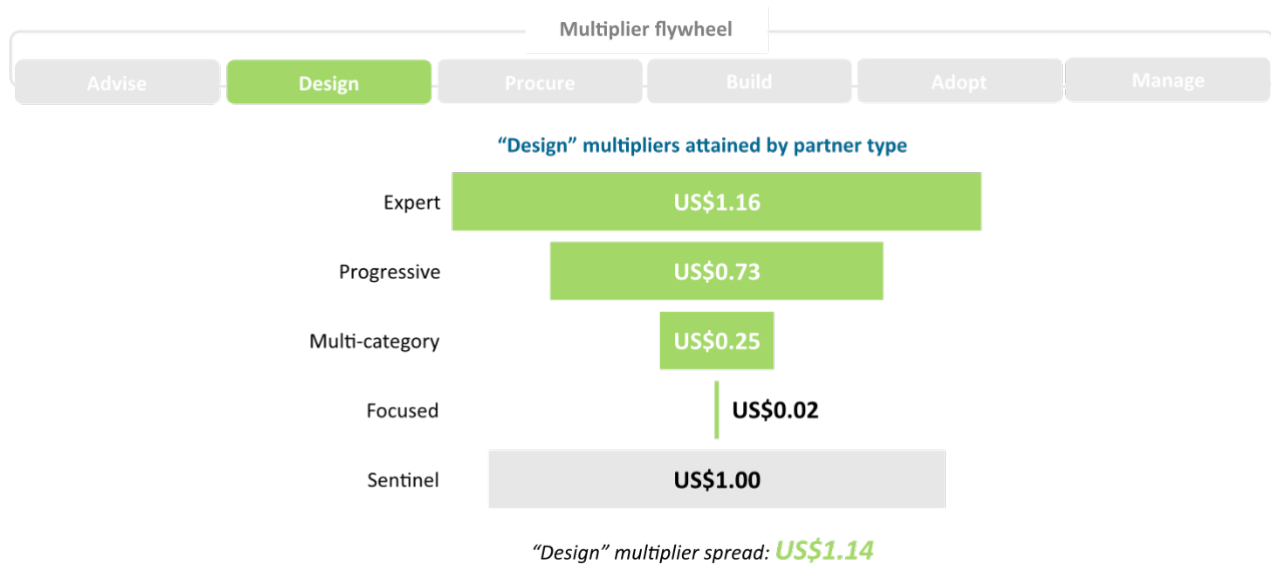


Interestingly, Advise services are often not directly billed by partners but instead included in managed or implementation fees. This billing approach may contribute to their low representation in the multiplier calculation but doesn't diminish their strategic importance. Partners who excel at Advise services can position themselves advantageously for the more lucrative Design and Manage segments, creating a pipeline for future revenue opportunities. The relatively small multiplier in this segment suggests an opportunity for partners to develop more sophisticated advisory capabilities and potentially capture additional revenue by establishing dedicated Advise service offerings.

To increase revenue from Advise services, partners should consider:

- **Formalize consulting offerings:** Develop structured advisory packages with clear deliverables and value propositions.
- **Develop industry expertise:** Build specialized knowledge in key vertical markets to provide more valuable strategic guidance.
- **Create assessment tools:** Develop proprietary assessment methodologies that help quantify the potential impact of OpenText solutions.

Design



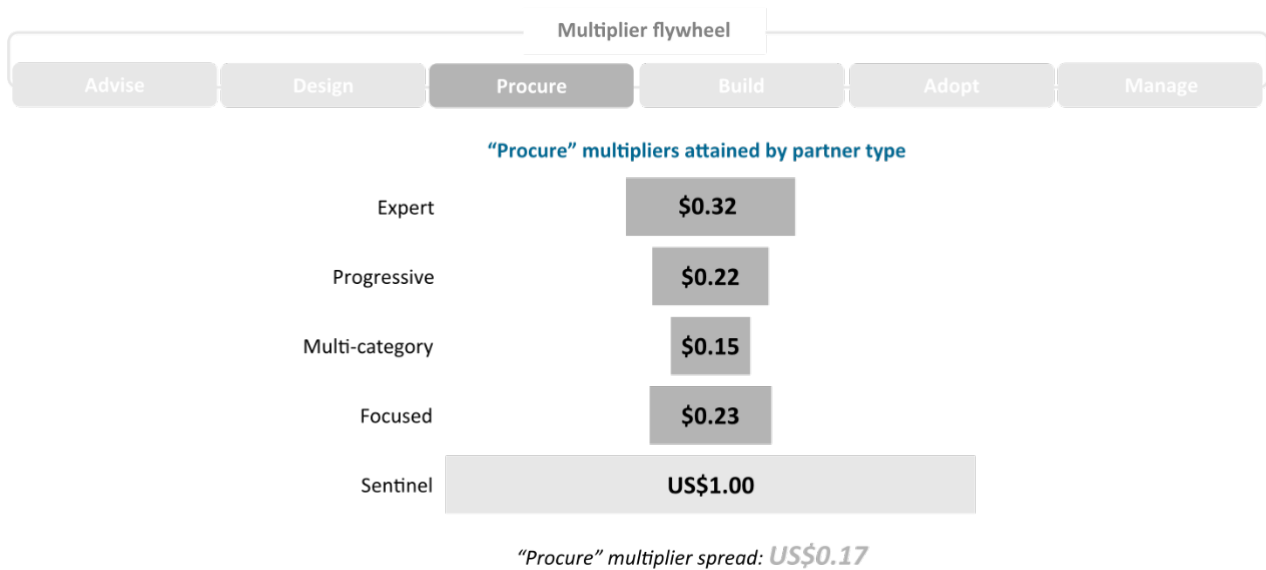
Design services represent US\$1.16 or 17.3% of the multiplier, making them a significant component of the partner revenue opportunity. These services encompass migration, testing, infrastructure set-up, architecture, and design activities that require partners to possess highly technical proficiency at infrastructure layers. Design services are particularly critical for Expert partners, who leverage these capabilities to differentiate themselves in the marketplace and establish the foundation for long-term customer relationships.

The variance in Design service revenue between partner categories is substantial, with Expert partners capturing significantly more value than Focused partners. This disparity stems from differences in customer scale and solution delivery effectiveness. Expert partners typically have access to large-scale, enterprise customers, which is critical to achieving the largest OpenText multiplier in the Design segment. These partners can handle complex migrations and infrastructure designs that smaller partners cannot, allowing them to command premium rates for their services. Design services also create opportunities for partners to demonstrate their technical expertise, building customer confidence that supports future service engagements across other segments of the flywheel.

To maximize Design services revenue, partners should:

- **Develop standardized methodologies:** Create repeatable design frameworks that can be customized for different customer scenarios.
- **Build technical depth:** Invest in specialized expertise for complex migration and infrastructure design challenges.
- **Leverage OpenText support:** Utilize OpenText’s technical resources to tackle more complex design challenges.

Procure



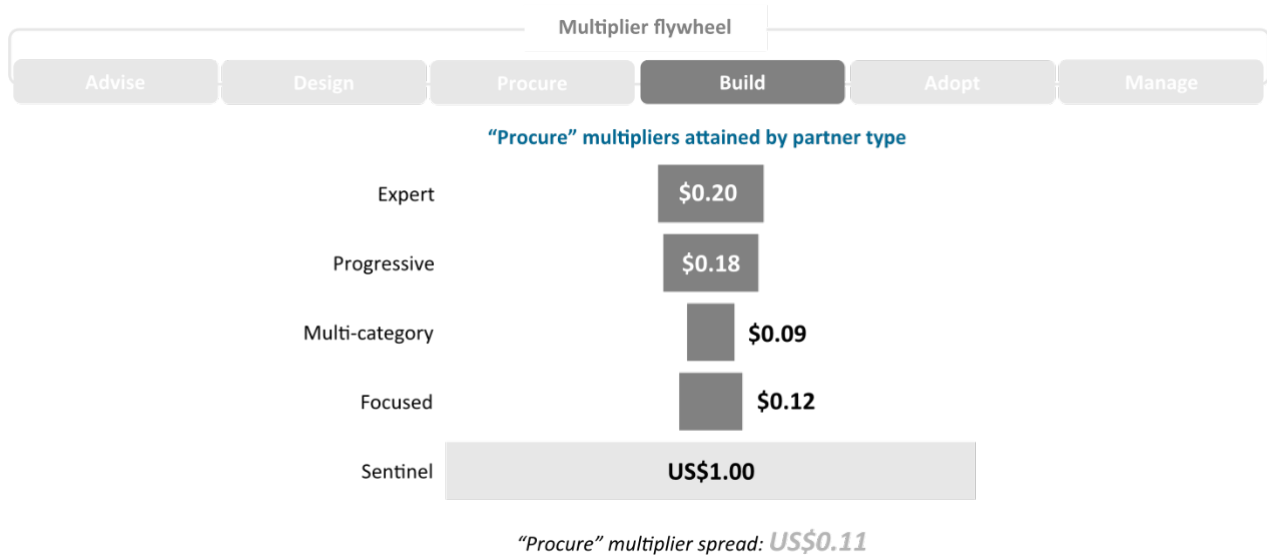
Procure services represent US\$0.32 or 4.8% of the multiplier, highlighting the importance of a full understanding of OpenText margin and programmatic support. This segment encompasses resell activities attributed to setting up OpenText products, including resell margins, rebates, and procurement management services. While not the largest contributor to the overall multiplier, Procure services provide an essential revenue stream for partners across all maturity categories.

Expert partners lead in Procure revenue partly due to their comprehensive understanding of OpenText bundles and offerings available to them. Their ability to navigate complex licensing structures and optimize procurement processes creates additional value for customers while maximizing their own revenue potential. All but two interviewed partners expressed high satisfaction with OpenText’s existing incentives and enablement, indicating strong programmatic support for the Procure segment.

To optimize Procure services revenue, partners should:

- **Master OpenText licensing:** Develop deep understanding of OpenText’s licensing models and bundle options. Develop pre-configured solutions packages that combine OpenText products with complementary offerings.
- **Leverage volume incentives:** Take advantage of OpenText’s programmatic support to maximize margins on larger deals.

Build



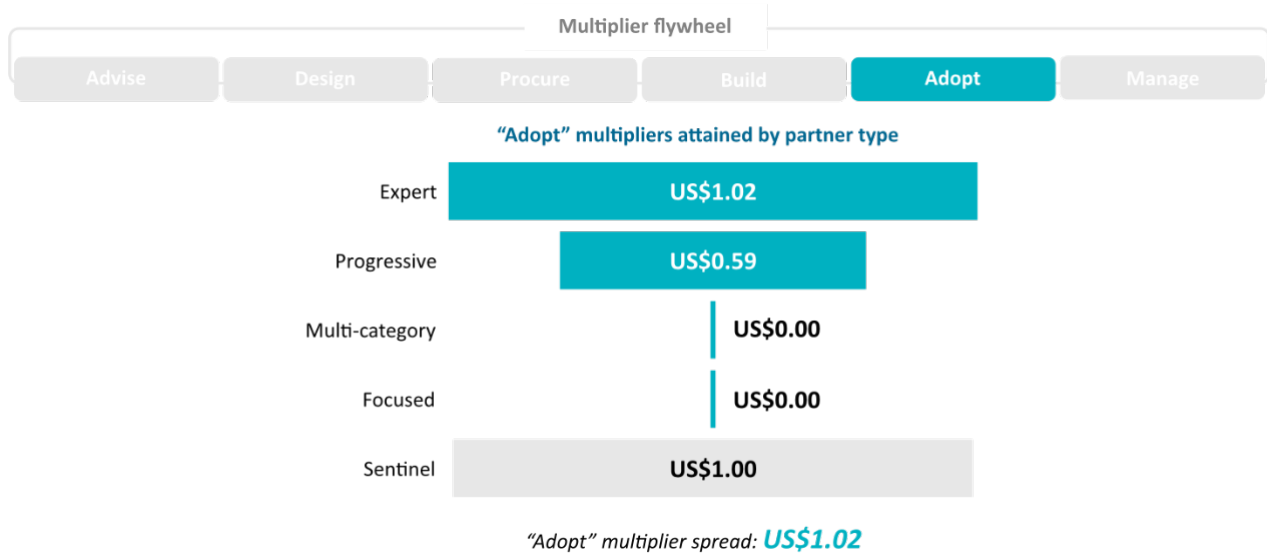
Build services represent US\$0.20 or 3% of the multiplier, encompassing customized software development and integrations with third-party vendors. For the majority of interviewed partners, this segment primarily involves Microsoft 365 resale through OpenText, limiting the need for case-by-case custom software development. While relatively small in terms of overall multiplier contribution, Build services provide an important opportunity for partners to differentiate themselves through specialized technical capabilities.

The Build segment stands as the first clear opportunity for partners to generate recurring revenue while also creating opportunities for co-sell and co-delivery between various partner types. Expert and Progressive partners can differentiate themselves within the ecosystem by having the size and skillsets to generate Build segment revenue. These partners typically leverage their ability to influence customer digital transformation decision-making at the start of the customer journey to position their Build services. However, the segment is limited by the fact that partners have often prepared tools they've already customized for each bundle they sell, reducing the need for extensive custom development work on each project.

To increase Build services revenue, partners should:

- **Develop reusable components:** Create modular solutions that can be customized for different customer scenarios.
- **Explore co-delivery models:** Partner with complementary service providers to tackle more complex implementation projects.

Adopt



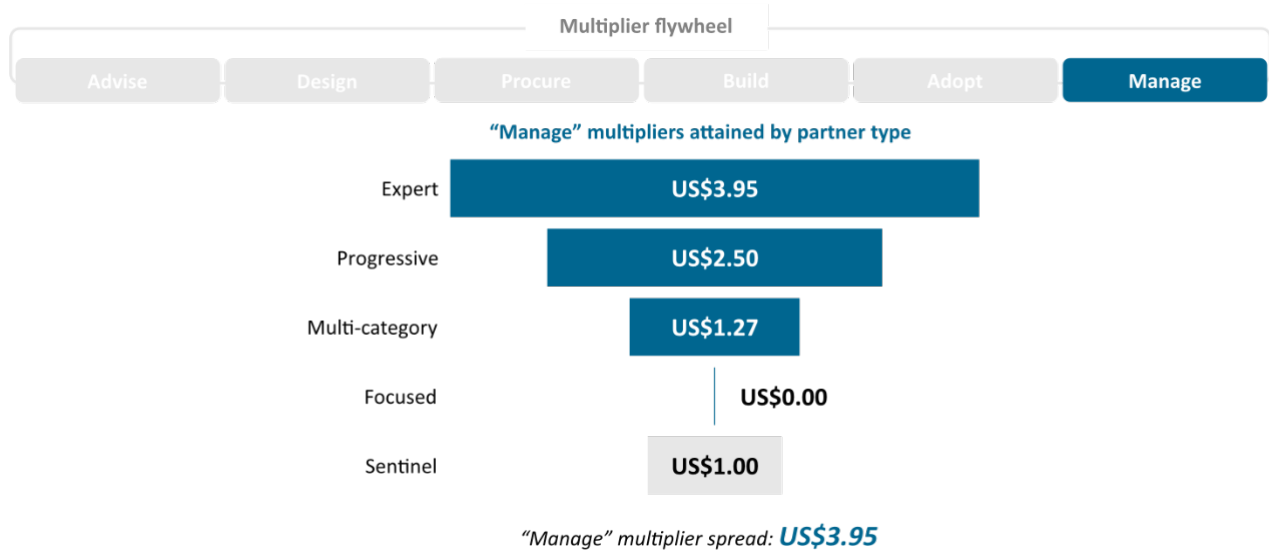
Adopt services represent US\$1.02 or 15.1% of the multiplier, serving as a critical bridge between implementation and long-term management. These services allow partners across categories to drive overall adoption of OpenText and perform the necessary analytics to identify cross-sell and up-sell opportunities. Training constitutes a significant part of the Progressive partner Adopt revenue stream, enabling these partners to expand and drive their overall PEM opportunity. For Expert partners working with enterprise-level customers, business process change management becomes a key component of their Adopt service offerings.

Partners who lead the growth of Adopt services throughout the three-year PEM project cycle can unlock new revenue opportunities, both in terms of Manage revenue and new project opportunities via cross-sell and up-sell of new OpenText services. By helping customers fully utilize their OpenText investments, partners create a foundation for long-term relationships and recurring revenue streams. The Adopt segment represents a strategic opportunity for partners to demonstrate ongoing value beyond initial implementation, positioning themselves as essential partners in their customers' digital transformation journeys. Expert partners leverage Adopt activities to guide customers through their current environments and identify potential use cases beyond the initial project scope, creating vital upselling opportunities.

To maximize Adopt services revenue, partners should:

- **Develop comprehensive training programs:** Create role-based training that addresses different user needs within customer organizations. Establish structured approaches to ensure customers achieve their desired business outcomes.
- **Implement adoption metrics:** Establish clear KPIs to measure and demonstrate the value of adoption services.

Manage



Manage services represent US\$3.95 or 58.6% of the multiplier, making them by far the largest contributor to partner revenue in the OpenText ecosystem. For 85% of interviewed partners, managed services represent the clearest opportunity for recurring revenue, generating gross profit margins between 30% and 40%. These services encompass ongoing support, maintenance, and operational management of OpenText implementations, providing a stable and predictable revenue stream for partners who can successfully establish long-term customer relationships.

For all defined partner types outside of Focused, Manage services constitute the majority of the overall PEM. Enabled by Adopt services, Progressive and Expert partners can significantly scale their Manage services opportunity within the OpenText ecosystem. With significant control across the digital and security transformation journey, Expert partners capture a Manage value 158% higher than Progressive partners. This substantial difference highlights the importance of comprehensive service capabilities in maximizing the Manage revenue opportunity. The dominance of Manage services in the overall multiplier underscores the importance of long-term customer relationships and the transition from project-based to relationship-based business models for partners seeking to maximize their revenue potential in the OpenText ecosystem.

To optimize Manage services revenue, partners should:

- **Implement proactive monitoring:** Shift from reactive to proactive support models to improve customer satisfaction.
- **Build operational efficiency:** Standardize support processes to improve margins while maintaining service quality.
- **Create value-added services:** Develop specialized offerings that extend beyond basic maintenance and support.

4

Summary

The OpenText Partner Ecosystem Multiplier study has revealed significant revenue potential for partners within the ecosystem, quantified as a US\$6.73 multiplier for every US\$1 spent on OpenText solutions. This potential is contingent on partners offering a broad spectrum of services throughout the customer lifecycle, with the most successful partners positioning themselves as trusted advisors guiding customers through digital transformations and securing recurring revenue through managed services.

Partners who successfully maximize their OpenText multiplier share these characteristics:

- **Comprehensive service portfolio:** They offer services across the entire Partner Ecosystem Flywheel.
- **Strong relationship focus:** They prioritize building long-term customer relationships over transactional sales.
- **Standardized approach:** They leverage OpenText bundles to create efficient, repeatable implementation processes.
- **Support utilization:** They actively engage with OpenText's support resources to tackle complex technical and strategic challenges.
- **Services-first mindset:** They position themselves as strategic advisors rather than product resellers.

Partner sentiment strongly indicates that OpenText's level of support is a critical factor in the success and growth of its partner ecosystem. While many partners were initially attracted to the OpenText ecosystem due to higher margins or particular bundles being offered, they expanded their OpenText business thereafter due to the unparalleled support they received. This is particularly important as most interviewed partners are combining OpenText software with third-party vendor products, especially in the more mature partner categories. These partners are often MSPs, making the level of support they receive from OpenText critical to not only efficiency but also in taking on clients of scale.

Unlike other ecosystems, where it is usually GSIs that are earning the top multiplier, mid-sized MSPs account for a large share of the OpenText expert category. A notable characteristic of the OpenText ecosystem is that smaller partners are thriving. The smallest interviewed partners by headcount all cited that they felt appreciated and prioritized by OpenText representatives. Even at the Progressive and Expert levels, partners remain at a fairly small headcount.

The OpenText Partner Ecosystem Multiplier study reveals significant revenue opportunities for partners who develop mature capabilities across the service flywheel. With Expert partners achieving a multiplier of US\$6.73 for every dollar spent on OpenText solutions, there is clear evidence of the value that can be created through the OpenText ecosystem.

"Like most other MSPs, we started out by a-la-carting software. But making certain solutions mandatory and bundling them in was probably our biggest change over the last few years. We're all about operational efficiency, and some MSPs don't realize how much efficiency you gain when you standardize. It saves so much time when it comes to supporting and deploying."

MSP, Southeast USA

The study's findings underscore the importance of a long-term services strategy for partners seeking to maximize their OpenText PEM. While the initial focus may be on resale and implementation, evolving into a services-led model with diversified offerings across the customer lifecycle is key to unlocking the full revenue potential. As the OpenText ecosystem continues to evolve, partners that adapt and expand their capabilities are poised to thrive in this dynamic landscape. OpenText's excellent support provides a strong foundation for partners to build successful service practices.

Partners looking to take advantage of the US\$6.73 PEM opportunity within the OpenText ecosystem need to be prepared for the significant investments required to shift toward a services-first approach. The most successful partners in this transition have taken advantage of existing bundles, trainings, and enablement, and have leaned on OpenText support for complex multi-vendor digital transformation projects.

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