

# Snowflake Ecosystem Partners

A research report comparing provider strengths,  
challenges and competitive differentiators

Customized report courtesy of:



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### **Snowflake modernizes data infrastructure, enables AI-driven insights and ensures compliance in cloud transitions**

In today's data-driven economy, enterprises face immense pressure to modernize their data infrastructure to support real-time decision-making, enhance agility and unlock new business value. However, legacy systems and fragmented architectures create significant obstacles that limit innovation, scalability and operational efficiency. As data volumes surge and use cases expand from AI and predictive analytics to secure data collaboration, traditional platforms fail to meet modern enterprise demands. Transitioning to cloud-native, flexible and intelligent platforms has become essential. In 2025, tech spending is mainly driven by investments in cybersecurity, infrastructure modernization and cloud adoption, data and analytics and AI-enabled innovation. Combined, these tech priorities fuel demand for cloud data platforms, such as

Snowflake, that enable firms to consolidate and manage diverse data types, including structured and unstructured, into a single platform. This consolidation eliminates data silos and improves data access, sharing and collaboration across the organizations.

The Europe Snowflake ecosystem is influenced by several business priorities, including:

- **Data scalability and performance bottlenecks:** Traditional on-premises data warehouses often struggle to accommodate modern enterprise data's volume, velocity and variety. As data grows exponentially, legacy systems become challenging and expensive to scale, resulting in performance degradation, slow query response times and resource contention. These limitations prove especially problematic when supporting concurrent users or existing AI and ML workloads. Cloud data platforms such as Snowflake offer elastic architectures that allow enterprises to scale, compute and store independently, ensuring high performance without overprovisioning.

# Modernizing data ecosystems for intelligent, secure and scalable growth.



- **Enabling data-driven decision-making:** Managing data effectively and improving data-driven decision-making have long been business priorities. Organizations increasingly rely on data analytics to guide their decision-making processes. Growing concerns over global supply chain disruptions, heightened by potential tariffs, have accelerated projects targeting increased process automation, improving visibility and ensuring business continuity. Simultaneously, the surge in AI awareness, demand and adoption has amplified the focus on data access, quality and management. This shift is transforming the data management landscape and increasing the demand for cloud data management platforms, including Snowflake and related services.
- **Cloud migration and multicloud complexity:** Enterprises pursuing cloud modernization often encounter challenges while migrating from legacy data platforms, such as data transfer latency, workload reconfiguration and compatibility issues, which pose risks of operational disruption. Many

organizations are adopting multicloud strategies to avoid vendor lock-in, comply with regional regulations or optimize cost and performance across providers. Data cloud platforms such as Snowflake simplify this transition by offering a cloud-agnostic and fully managed architecture. Its native support for cross-cloud replication, unified user experience and built-in governance tools allow enterprises to operate a single, secure data platform across clouds, enabling workload portability, regulatory compliance and business continuity without added infrastructure overhead.

- **Enhancing data sharing, collaboration and monetization:** The shifting dynamics of hybrid work have increased the demand for solutions and platforms that enable collaboration across geographical and organizational boundaries. Cloud data platforms, such as Snowflake, ease data sharing and access for distributed teams. Snowflake's data-sharing capabilities and marketplace allow organizations to monetize their data, transforming data into a tangible strategic asset.

- **Delivering insights for transparency, traceability and reporting:** This effort begins with regulatory compliance, especially regarding data protection regulations, such as GDPR and CCPA. Organizations seek to consolidate and share data to enhance sustainability initiatives that evaluate, manage and reduce carbon footprints. AI-driven insights, facilitated by a well-managed cloud data management platform, have become essential for achieving these sustainability goals.
- **Scaling for AI and modern analytics:** Legacy systems rarely support modern analytics, ML and AI at scale. Enterprises need platforms that integrate natively with data science tools, support Python or R, and allow for in-database ML processing. Snowflake addresses this need with its tools, accelerators and native integration with third-party ML platforms, making it easier to prepare data, run models and deploy AI and generative AI (GenAI) solutions securely and efficiently.

- **Ensuring effective data governance and security:** With increasingly strict data privacy regulations, such as GDPR, HIPAA and CCPA, particularly in Europe, enterprises must enforce strict governance controls, secure access and maintain audit trails. Traditional platforms often lack native capabilities to support fine-grained access control or cross-regional compliance. Snowflake addresses these concerns with built-in features, such as role-based access control (RBAC), dynamic data masking, data lineage and support for regulatory frameworks through integrations with third-party governance tools.

As European organizations increasingly adopt Snowflake for their data management needs, the ecosystem surrounding this cloud data platform is undergoing rapid transformation. The Snowflake ecosystem has rapidly evolved into a foundational data platform for enterprises seeking to modernize their data strategies, integrate AI capabilities and enable secure collaboration across distributed ecosystems. As the Snowflake ecosystem matures, IT service providers play a pivotal role in helping clients unlock the platform's



## Executive Summary

full value through strategic consulting, deep platform engineering, native application development and managed services. Several major trends are emerging in the capabilities of IT service providers concerning Snowflake implementations, spanning consulting and advisory, implementation services, managed services, data engineering and advanced technologies, highlighting the dynamic nature of this ecosystem.

A critical growth area is the **expansion of consulting and advisory services**. IT service providers increasingly offer tailored consulting solutions to guide European organizations through their Snowflake journeys, aligning their data strategies with business goals. These advisory services cover various offerings, including strategic assessments, architecture design, data governance frameworks and change management processes. By leveraging their expertise in industry best practices, consultants help organizations identify areas where Snowflake can deliver significant value, ensuring optimized investments for maximum ROI. Moreover, these consulting services often extend beyond initial implementation, providing

ongoing support as organizations evolve and adapt to new business needs. Providers analyze organizational data readiness, suggest improvements in data quality and help establish robust governance structures necessary for compliant and effective data usage. This advisory role is vital in fostering a culture of data-driven decision-making, enabling organizations to integrate analytics seamlessly into their operations and empowering employees to derive actionable insights from their data assets.

Another noticeable trend in the Snowflake ecosystem for the European region is the **enhancement of implementation services** offered by IT service providers. As businesses transition their data infrastructures to Snowflake, providers deliver a broader array of end-to-end implementation services to ensure smooth transitions. These services encompass various approaches, from traditional greenfield implementations to the complexities of migrating large volumes of data from legacy systems. Service providers, using advanced data migration tools and methodologies, such as those based on GenAI, streamline the

migration process, minimizing disruptions and ensuring data integrity.

In their migration and transformation efforts, service providers increasingly **leverage Snowflake's comprehensive suite of products**, including Streamlit, Snowpark and various native applications. For instance, Streamlit enables providers to rapidly build interactive data applications, granting organizations user-friendly interfaces for visual data analysis without deep technical expertise. The adoption of Snowpark technology is reshaping how European organizations approach data transformation, enabling the development of custom applications and analytics directly within the Snowflake platform. Snowpark facilitates custom data processing workflows by allowing data engineers and scientists to develop functions in their preferred programming languages directly within Snowflake's environment. Such integration encourages teamwork and promotes data sharing across the organization. This shift enhances operational efficiency and fosters innovation in data utilization and analysis.

Alongside these enhancements in implementation, a significant trend involves the increasing **integration of advanced analytics and AI technologies** in the European region. Service providers leverage Snowflake's capabilities to offer sophisticated analytics solutions tailored to specific business needs. Deploying GenAI within data products optimizes various tasks, including data modeling, quality checks and insights generation. Tools such as Snowflake's Cortex AI enable predictive analytics, real-time monitoring and AI-assisted compliance, empowering organizations to make informed, data-driven decisions aligned with their business objectives and amplifying the value derived from their data assets. The emergence of autonomous data agents exemplifies how AI-driven solutions streamline complex migration tasks and data analysis processes. These advancements reduce project timelines and enhance user self-service capabilities, allowing business users to derive insights and value from data independently.

Another emerging theme is the development of **tailored, industry-specific solutions on**



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Snowflake. Service providers are aligning with **Snowflake's Industry Data Clouds**, especially for banking and healthcare, to offer verticalized data products that embed compliance templates, domain-specific KPIs and AI capabilities. These offerings reduce time-to-value for European clients while helping them navigate complex legal landscapes. Providers are also implementing Snowflake-powered industry cloud solutions that comply with sector-specific regulations and performance metrics.

A notable trend is the rise of **Snowflake Native Apps and Marketplace-based monetization strategies**. Leveraging Snowflake's Native App Framework, providers develop custom applications that improve operational efficiencies. Organizations streamline their data management workflows through these built-in features, enhance productivity and respond more rapidly to market shifts. Providers are building and managing applications using the Snowflake Native App Framework leveraging SQL, JavaScript and Snowpark APIs to address needs such as FinOps dashboards, predictive maintenance applications and intelligent

document processing. These applications are often distributed via the Snowflake Marketplace, where service providers help clients monetize their data assets through curated data products and embedded analytics. Snowflake's marketplace capabilities enhance data access and monetization opportunities, allowing organizations to buy and sell relevant datasets tailored to their needs.

As organizations recognize the importance of sustaining their data environments, the demand for **managed services designed to optimize and govern** these platforms has risen sharply in Europe. Providers are expanding their managed services capabilities with a keen focus on cost optimization, data observability and continuous integration/continuous deployment (CI/CD) mechanisms. They are integrating advanced **data observability tools** that offer real-time monitoring of data flows and transformations, enabling organizations to gain insights into the entire data lifecycle, ensuring data accuracy, consistency and availability. Additionally, audit tools are implemented to maintain compliance and oversight, providing organizations with essential tracking and reporting capabilities.

This capability allows businesses to proactively identify and rectify issues, fostering accountability and transparency within their data operations.

Moreover, the **focus on cost optimization** within managed services is paramount. Providers employ advanced strategies to analyze usage patterns, eliminate unnecessary expenditures and advise clients on efficient resource allocation. Implementing CI/CD mechanisms for Snowflake environments further enhances the agility and flexibility of data operations by enabling rapid deployment of updates and features without significant downtime. This iterative approach ensures that organizations can swiftly adapt to changing business needs, maintaining a competitive edge in fast-paced markets.

**Security and governance within the Snowflake ecosystem** have also become paramount, especially as enterprises handle sensitive data. In Europe, Snowflake adoption is influenced by distinct priorities and regulatory requirements. One prominent trend is the strong emphasis on data compliance, governance and sovereignty, which is driven primarily by GDPR. Enterprises

across sectors seek Snowflake deployments that align closely with regional privacy mandates. As a result, service providers are tailoring Snowflake implementations with granular role-based access control (RBAC), dynamic data masking, object tagging and audit-ready configurations. IT service providers commit to establishing robust data governance frameworks that ensure compliance with industry regulations, especially in the finance and healthcare sectors.

European clients are increasingly exploring Snowflake's advanced data-sharing and collaboration features. The adoption of **Snowflake Clean Rooms is growing**, particularly in sectors where data privacy and consent management are critical. Service providers enable secure multiparty analytics using Snowflake's clean room capabilities, offering tokenization, anonymization and privacy-enhanced data-sharing support. Introducing data clean rooms helps businesses maintain data privacy while enabling secure collaboration across different datasets for analytical purposes.



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Another significant trend in the European Snowflake ecosystem is **the emphasis on partnerships and continuous learning**. Service providers are forming strategic alliances with academic institutions and training organizations to bridge the skills gap in data management. These collaborations focus on developing talent in data engineering, AI and Snowflake-related technologies, ensuring organizations have access to a skilled workforce capable of navigating the complexities of modern data ecosystems. Partnerships with e-learning platforms facilitate ongoing professional development, allowing employees to stay updated on the latest industry trends and advancements. This commitment to continuous learning fosters a culture of innovation and adaptability, positioning organizations to respond effectively to ever-evolving market demands.

In conclusion, the Snowflake ecosystem is witnessing a remarkable transformation as IT service providers enhance their capabilities across multiple dimensions. From advanced implementation and managed services to cost optimization, AI integration and robust

governance frameworks, organizations benefit significantly from these trends. As businesses in Europe continue to navigate their digital transformation journeys, collaboration between service providers and enterprises will be critical in unlocking the full potential of Snowflake's capabilities. These trends reflect the current landscape and pave the way for a future where data becomes a pivotal asset for innovation and strategic decision-making. Staying attuned to these trends is essential for businesses aiming to leverage Snowflake, maximizing their data potential while ensuring compliance, security and operational efficiency. As service providers continue to innovate and refine their offerings, organizations can anticipate a dynamic and supportive ecosystem that fosters data-driven success across their industries.

Snowflake facilitates cloud transformation by consolidating diverse data types and supporting secure collaboration across multicloud environments. Enterprises embrace Snowflake to modernize their infrastructure and adopt platforms that unify data, support AI, and ensure compliance. Service providers are key enablers in guiding seamless adoption and unlocking business value.





## Provider Positioning

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	Snowflake Consulting and Advisory Services	Snowflake Implementation Services	Snowflake Managed and Support Services
Accenture	Leader	Leader	Leader
adesso SE	Market Challenger	Market Challenger	Not In
Altimetrik	Contender	Contender	Not In
Birlasoft	Product Challenger	Product Challenger	Product Challenger
Capgemini	Leader	Leader	Leader
Coforge	Product Challenger	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader
DXC Technology	Leader	Leader	Leader
Genpact	Market Challenger	Market Challenger	Market Challenger







## Provider Positioning

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	<b>Snowflake Consulting and Advisory Services</b>	<b>Snowflake Implementation Services</b>	<b>Snowflake Managed and Support Services</b>
Grazitti Interactive	Contender	Contender	Not In
Hakkoda	Product Challenger	Product Challenger	Product Challenger
HCLTech	Market Challenger	Market Challenger	Market Challenger
Infocepts	Contender	Contender	Contender
Infosys	Leader	Leader	Leader
LTIMindtree	Leader	Leader	Leader
Mastek	Contender	Contender	Contender
Mphasis	Rising Star ★	Rising Star ★	Rising Star ★
Perficient	Contender	Contender	Contender
Quantiphi	Product Challenger	Product Challenger	Product Challenger





## Provider Positioning

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	<b>Snowflake Consulting and Advisory Services</b>	<b>Snowflake Implementation Services</b>	<b>Snowflake Managed and Support Services</b>
Slalom	Product Challenger	Product Challenger	Not In
Spaulding Ridge	Product Challenger	Product Challenger	Product Challenger
Synechron	Contender	Contender	Not In
TCS	Leader	Leader	Leader
Tech Mahindra	Market Challenger	Market Challenger	Market Challenger
Tiger Analytics	Product Challenger	Product Challenger	Product Challenger
Wipro	Market Challenger	Market Challenger	Market Challenger



This study evaluates providers' capabilities based on their **product** and **service portfolio** and **competitiveness** within the Snowflake ecosystem.

Simplified Illustration Source: ISG 2025



**Snowflake Consulting and Advisory Services**

**Snowflake Implementation Services**

**Snowflake Managed and Support Services**

### Definition

Snowflake has emerged as a transformative force in the data management and analytics landscape. It is well positioned in a dynamic market, with strong opportunities to leverage its cloud-native architecture, scalability and versatility to meet the increasing demand for AI-fueled data access and sharing and data-driven applications.

Snowflake integrates with various analytics, business intelligence (BI) and data science tools to address enterprises' needs. The Snowflake ecosystem has evolved rapidly, increasing the need for enterprises to leverage data-driven insights when selecting a partner, especially when evaluating advanced data solutions and services that complement Snowflake's unique architecture.

Snowflake is supported by a network of partners delivering technical implementations and offering services encompassing data integration, analytics, governance and cost optimization.

A successful partnership with Snowflake requires providers to be agile, innovative and deeply familiar with the platform's evolving features and best practices.

Partners' capabilities fall broadly into three quadrants:

- **Snowflake Consulting and Advisory Services**, including strategy, governance and the effective use of AI and BI
- **Snowflake Implementation Services**, including cloud migration, data engineering and business application development
- **Snowflake Managed and Support Services**, including ongoing support, cost optimization and training services

ISG analyzes how providers are positioned in these three quadrants across the U.S. and Europe, based on their portfolio strength and market competitiveness. While many providers offer Snowflake-related services in these regions, this report will exclusively focus on the leading competitors within each studied quadrant.



### Scope of the Report

This ISG Provider Lens™ quadrant report covers the following three quadrants for services/solutions: Snowflake Consulting and Advisory Services, Snowflake Implementation Services and Snowflake Managed and Support Services.

This ISG Provider Lens™ study offers business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- Differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on different markets, including the U.S. and Europe

Our study is an important decision-making basis for positioning, key relationships and go-to-market (GTM) considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

### Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).





### Provider Classifications: Quadrant Key

**Product Challengers** offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

**Contenders** offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

**Leaders** have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

**Market Challengers** have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

**Not in** means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





# Snowflake Consulting and Advisory Services

## Who Should Read This Section

This report is valuable for providers offering Snowflake consulting and advisory services in Europe to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

### **Business and strategy professionals**

should read this report to understand Snowflake-related trends and how providers can help them assess data maturity and cloud readiness and identify relevant use cases.

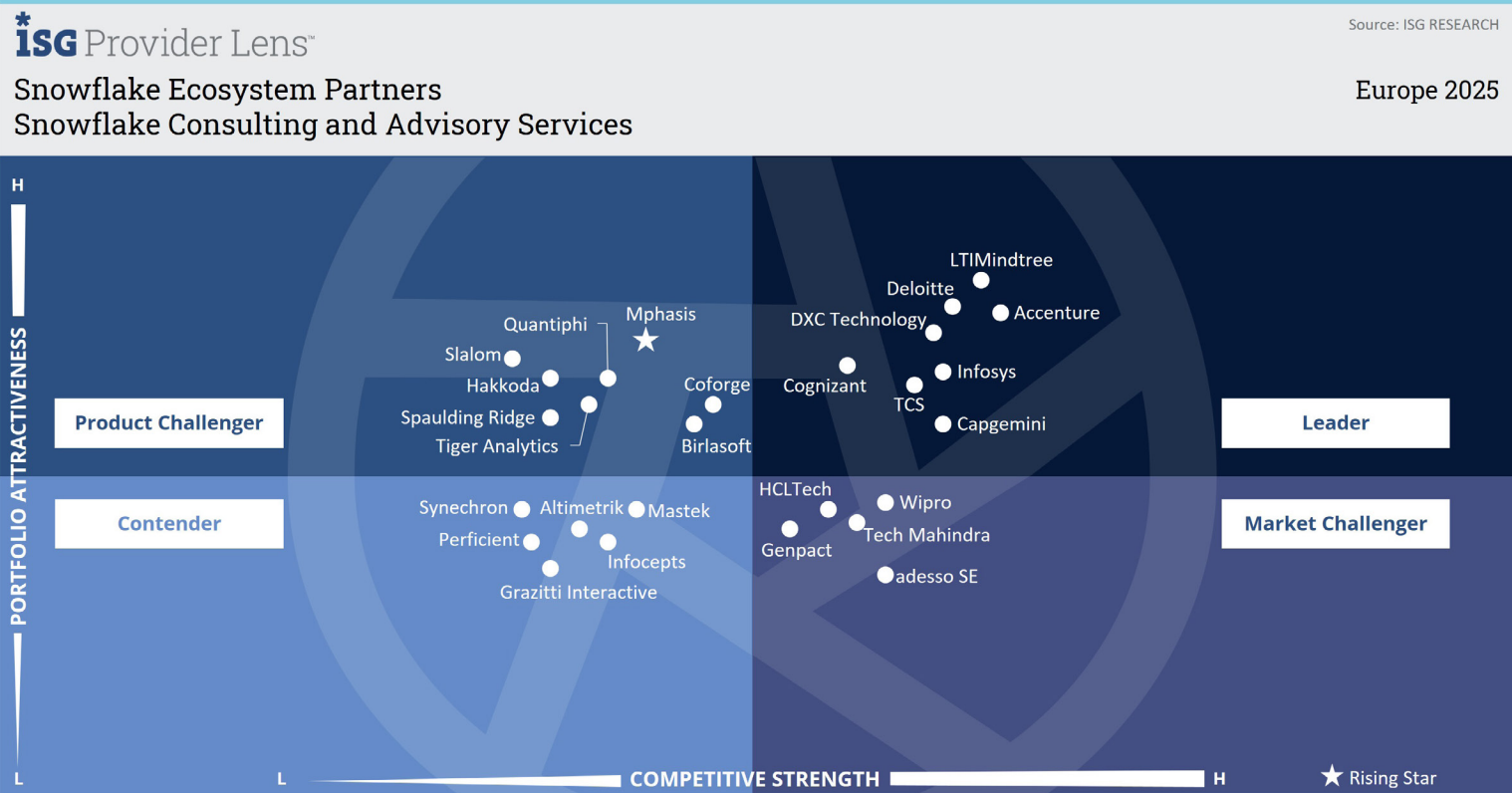
### **Digital professionals**

should read this report to understand how providers support cloud data adoption, AI and ML readiness, and compliance best practices to accelerate digital transformation.

### **Technology professionals**

should read this report to learn how providers offer Snowflake services, integrate modern technologies, align cloud data strategies, optimize performance and future-proof architecture.





This quadrant assesses how service providers **advise, design** and **accelerate data-driven transformations** for Snowflake adoption. It highlights their strengths in **data strategy, industry alignment** and **innovation consulting**.

Hemangi Patel





### Definition

This quadrant evaluates providers offering consulting and advisory services within the Snowflake ecosystem to help enterprises optimize their data strategies and maximize ROI from their Snowflake investments by effectively using AI, BI and analytics. These services include data strategy formulation, architecture design and implementation planning tailored to Snowflake's cloud-native platform.

Providers support clients in assessing data needs, identifying high-value use cases and creating road maps that align Snowflake's capabilities with their business objectives. They also help integrate and modernize data workloads by evaluating existing architectures, data and migration readiness, and cloud strategies. Additional offerings may include training programs, organizational change management, data privacy and security best practices, and risk assessments.

In conclusion, providers help enterprises navigate their data transformation journeys and establish themselves as data-driven organizations.

### Eligibility Criteria

1. Offer consulting services for **strategy development, project management methodology**, requirements gathering and delivery
2. Showcase proven **industry experience**, including best practices, adherence to regulations and managing data challenges
3. Expertise in **assessing enterprise data maturity and cloud readiness** to evaluate existing infrastructure and migration pathways
4. Expertise in identifying relevant **use cases and designing data architecture blueprints** that align with Snowflake's best practices
5. Expertise in developing **risk assessment frameworks, conducting compliance audits and creating mitigation plans** to adhere to privacy standards
6. Expertise in **data governance**, including the implementation of controls, compliance frameworks and security measures within the Snowflake environment
7. Showcase documented methodologies and approaches for **migration planning and architecture design**
8. Expertise in designing analytics framework solutions that leverage Snowflake's **data visualization and reporting** capabilities
9. **Offer training programs and workshops** for effective understanding and adoption of Snowflake
10. Employ **KPIs and metrics, including ROI assessment methodologies**, to evaluate the effectiveness of Snowflake implementation



## Snowflake Consulting and Advisory Services

### Observations

Snowflake, as a cloud data platform, is becoming essential for data-driven decision-making. However, unlocking its full potential requires a strategic approach. Service providers specializing in Snowflake services recognize this need and enhance their strategy and consulting capabilities. They develop comprehensive frameworks and road maps that guide organizations in effectively adopting Snowflake. These frameworks help businesses identify specific use cases where Snowflake can deliver the most value, optimize data operations and maximize ROI.

Successful integration of Snowflake technologies necessitates more than implementation; it requires a fundamental shift in people and processes. Service providers facilitate this change by offering guidance on organizational transformation and training for seamless transition. Investing in employee training and upskilling in Snowflake tools is vital for fostering a data-centric culture, enabling teams to leverage this platform effectively. Robust data governance frameworks are imperative to maintain high data quality and

comply with security standards. Providers also help enterprises establish strong data governance practices that safeguard data integrity and maximize competitive advantages from data-driven strategies.

Ultimately, service providers empower enterprises by aligning strategic vision and building strong GTM with Snowflake's capabilities to innovate and achieve operational efficiency, thereby positioning them favorably in a rapidly evolving data landscape.

From the 27 companies assessed for this study, 27 qualified for this quadrant, with eight being Leaders and one a Rising Star.

### **accenture**

**Accenture's** strategic frameworks and deep domain knowledge for leveraging Snowflake's capabilities reflect its commitment to developing tailored solutions that address sector-specific needs, positioning it as a Leader in the quadrant.

### **Capgemini**

**Capgemini** leads this quadrant due to its end-to-end consulting expertise and commitment to GenAI innovation and secure, scalable architectures, helping clients transition from data modernization to achieving business transformation.

### **cognizant**

**Cognizant** leads with comprehensive consulting frameworks and advanced CoE capabilities, driving innovation and AI-driven data modernization. It's Snowflake Business Group aims to further strengthen its go-to-market strategy, reinforcing Cognizant's market leadership.

### **Deloitte.**

**Deloitte's** robust advisory capabilities, proven frameworks and specialized focus on GenAI enable organizations to accelerate modernization through a business-first, value-driven approach.

### **TECHNOLOGY**

**DXC Technology's** strong position stems from its ability to help clients transition from legacy systems to AI-driven data platforms by aligning data strategy and ensuring seamless digital transformation through consulting, implementation and change management.

### **Infosys**

**Infosys' Snowflake CoE**, backed by years of co-innovation and deep consulting expertise, empowers enterprises to accelerate data modernization, making it a Leader in this quadrant.

### **LTIMindtree**

**LTIMindtree's** robust advisory portfolio, data-driven assessment frameworks and industry-leading compliance and security capabilities establish it as a Leader in this quadrant.



## Snowflake Consulting and Advisory Services



**TCS'** leadership in this quadrant is driven by its strong talent capabilities and deep domain expertise across industry verticals, such as retail and financial services, enabling tailored, high-impact Snowflake solutions for diverse enterprise needs.



**Mphasis'** strong focus on innovation and its deep advisory capabilities in developing data strategies and road maps that help deliver innovative data solutions contribute to its position as a Rising Star position in this quadrant.





“DXC Technology uses deep advisory and data strategy capabilities to maximize client data potential in their Snowflake journey. Combining data governance, GenAI insights and strategic collaborations with startups drives transformation and efficiency.”

*Hemangi Patel*

# DXC Technology

## Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees across over 130 offices in 65 countries. In FY24, the company generated \$13.7 billion in revenue, with Global Infrastructure Services (GIS) and Global Business Services (GBS) each making up approximately 50 percent of the annual revenue. DXC offers services such as strategy development, maturity and readiness assessment, risk assessments, data governance, migration planning and data visualization as part of its Snowflake consulting and advisory portfolio. It employs over 650 delivery professionals in Europe who specialize in more than 150 projects and services across industries, such as financial services, automotive, manufacturing and the public sector.

## Strengths

**Deep advisory capabilities:** DXC’s Snowflake advisory capabilities encompass data strategy, governance, risk assessments, migration planning, use case evaluation and prioritization, and organizational roles and responsibilities. The company also establishes data usage patterns, architecture blueprints and governance frameworks. DXC also offers specialized advisory services in data mesh, GenAI, compliance-driven risk analytics and ESG consulting.

**Focused approach to data strategy:** DXC’s Data Management Maturity Assessment evaluates data strategies across governance, quality, security, infrastructure and visualization, providing a road map for optimization. Its Data Metabolism Assessment identifies gaps in data

utilization, offering insights to enhance efficiency and maximize business value. With heatmap assessment and brainstorming workshops, DXC enables organizations to identify areas for improvement and maximize their data potential while leveraging the Snowflake platform.

**Focus on innovation:** DXC’s startup acceleration centers in Stuttgart, Germany, (including STARTUP AUTOBAHN powered by Plug&Play and ARENA2036) serves as a hub for collaboration between corporate partners and emerging technology companies. It facilitates pilot projects and fosters innovation, laying the foundation for future investments across Europe. Technology partners such as Snowflake play a key role in supporting this initiative.

## Caution

This approach will ensure that Snowflake remains at the forefront of data innovation in Europe.





# Snowflake Implementation Services

## Who Should Read This Section

This report is valuable for providers offering Snowflake implementation services in Europe to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

### Technology professionals

should read this report to assess Snowflake implementation partners' capabilities, including data engineering and governance, cloud architecture and multicloud deployment strategies.

### Research and innovation professionals

should read this report to understand providers' ability to help leverage AI and ML and Snowflake's data capabilities to drive innovative data-driven solutions.

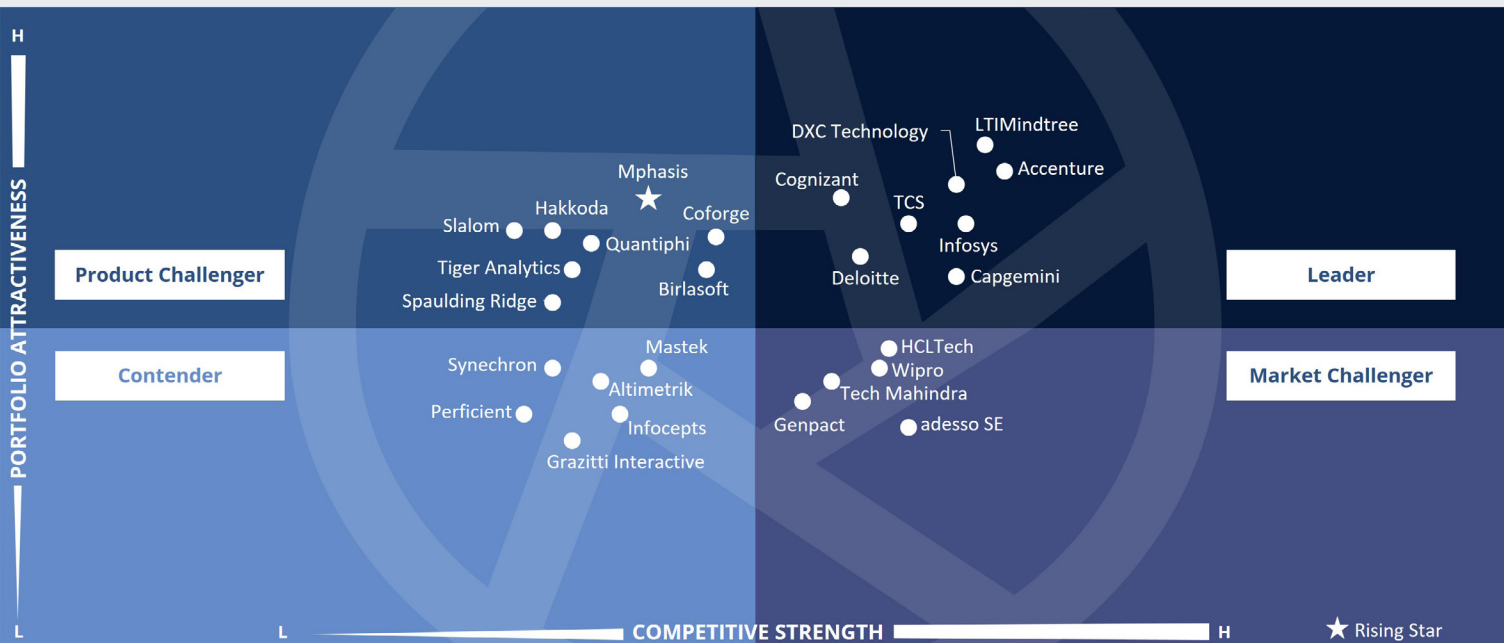
### Product and strategy professionals

should read this report to assess providers' expertise in Snowflake integration, which helps them drive data sharing and collaboration and accelerate AI and ML adoption.

### Business professionals

should read this report to understand providers' relative positioning and ability to deliver measurable business improvements and outcomes and ensure a positive ROI.





This quadrant evaluates how providers **deploy**, **integrate** and **optimize** Snowflake solutions. It focuses on their **technical expertise**, **delivery capabilities** and ability to ensure **scalable, secure and high-performance implementations**.

Hemangi Patel

## Snowflake Implementation Services

### Definition

This quadrant evaluates providers offering implementation services to help enterprises adopt Snowflake, modernize data landscapes, enable advanced analytics and deliver data-driven business applications. Providers must bring technical and industry expertise to fully leverage Snowflake's capabilities.

Providers are expected to support clients in areas such as data engineering, cloud architecture and deployment, AI integration, business applications and data sharing. Key services include data integration and ETL (extract, transform, load), data lake setup for scalable storage and collaboration framework implementation for improved data accessibility.

Partners play a vital role in implementing industry-specific solutions, enabling data-driven applications and embedded and customer analytics, fostering data sharing and collaboration for better decision-making, and providing integration services to connect Snowflake across multicloud or hybrid environments.

### Eligibility Criteria

1. Expertise in Snowflake **architecture, configuration and best practices**, complemented by consultant certifications or qualifications
2. Proven **industry experience** in delivering Snowflake-based, industry-specific solutions
3. Demonstrate referenceable customer success stories that showcase **measurable business improvements and outcomes**
4. Expertise in integrating Snowflake with AWS, Azure and Google Cloud, using native cloud services for performance optimization and implementing scalable data lakehouse or hybrid architectures
5. Expertise in building **ETL/ELT pipelines** and connecting Snowflake with diverse data sources, including legacy systems, real-time streams and third-party tools
6. Strong knowledge of Snowflake's **Secure Data Sharing** to enable real-time collaboration and create data marketplaces with external partners
7. Experience in **integrating Snowflake with analytics platforms**, such as Python, R and Tableau, and **enabling AI and ML workflows** using Snowpark or partner solutions
8. In-depth understanding of Snowflake's core features, including data warehousing, data sharing, Snowpark and secure data exchange
9. Capabilities in **developing custom analytics solutions and integrating business applications** with CRM and ERP systems





## Snowflake Implementation Services

### Observations

As organizations increasingly migrate to cloud data platforms like Snowflake, the demand for robust implementation services is rising. Service providers are enhancing their capabilities in data migration, transformation and greenfield implementations to ensure a seamless transition. They employ various methodologies and best practices to facilitate efficient data migration, minimizing downtime and ensuring data integrity throughout the process.

Service providers are leveraging advanced techniques, including Snowflake's Cortex AI, to embed intelligent automation and GenAI use cases into data pipelines, and advanced orchestration for seamless integration across cloud environments. Coupled with Snowpark, which enables developers to simplify data pipelines and accelerate the development and performance of data engineering and ML and AI workloads, these tools enhance overall efficiency.

Automation accelerators, proprietary toolkits and migration frameworks further reduce time-to-value and complexity in large-scale implementations. Another key focus area is the development of data products that can be built and deployed on the Snowflake platform to address specific industry challenges and turn data into actionable insights. Additionally, leveraging the Snowflake Marketplace allows service providers to enhance the accessibility and visibility of these data products, promoting collaboration and data-sharing across organizations. In summary, service providers are playing a critical role in data migration, transformation and product development. Combining innovative technologies such as Cortex AI and Snowpark empowers enterprises to leverage their data assets effectively and strategically.

From the 27 companies assessed for this study, 27 qualified for this quadrant, with eight being Leaders and one a Rising Star.

### accenture

With a strong focus on data migration, industry-specific solutions and Snowflake Cortex AI, **Accenture** empowers clients to accelerate transformation by streamlining migrations, unlocking industry insights and building scalable GenAI applications.

### Capgemini

**Capgemini** is a leader in implementation services in Europe due to its deep expertise in data modernization, GenAI innovation and strong delivery capabilities across industries, including retail, media and financial services.

### cognizant

**Cognizant's** ability to leverage Snowflake Cortex to build GenAI-powered solutions enables intelligent automation and enhanced decision-making, resulting in its leadership position in the market.

### Deloitte.

**Deloitte** has integrated various tools and accelerators throughout the migration process. This methodology delivers substantial time savings, with automation reducing durations by 60–95 percent across stages while ensuring robust data validation and minimal risk.

### DXC TECHNOLOGY

**DXC Technology's** comprehensive Snowflake implementation services, including cloud migration, data engineering and business application development, help businesses maximize data utilization, contributing to its strong market position.

### Infosys

**Infosys** is a Leader in this quadrant due to its industry-focused accelerators, AI-driven insights and automated frameworks, which showcase strong implementation portfolio capabilities.



## Snowflake Implementation Services



**LTIMindtree** leads in implementation services with PolarSled for seamless migration, Canvas.ai for AI-driven innovation and a diverse suite of industry solutions, maximizing Snowflake's potential through automation, AI integration and domain-specific accelerators.



**TCS** has strengthened its position as a Leader in the quadrant with platforms such as TCS Daezmo and TCS Optumera™, which play a pivotal role in accelerating the data-to-decisions journey for enterprises while offering industry-specific capabilities for data transformation.



**Mphasis'** capability to build next-generation data applications, strong industry-focused capabilities and ability to integrate GenAI capabilities with data engineering modernization platforms are the primary factors driving its Rising Star position in this quadrant.





"DXC Technology empowers enterprises to unlock the full potential of Snowflake implementation services with automated data integration, intelligent migration and scalable solutions, ensuring seamless transitions and optimized performance."

*Hemangi Patel*

# DXC Technology

## Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees across over 130 offices in 65 countries. In FY24, the company generated \$13.7 billion in revenue, with Global Infrastructure Services (GIS) and Global Business Services (GBS) each making up approximately 50 percent of the annual revenue. DXC offers comprehensive Snowflake implementation services that help businesses optimize data management and analytics with scalable, cloud-based solutions. Its strategic partnership with Snowflake delivers advanced data-driven and AI-powered solutions. Leveraging deep technical and industry expertise, DXC helps clients effectively deploy and maximize the value of Snowflake's open and extensible data platform.

## Strengths

### **Comprehensive implementation services:**

DXC offers comprehensive Snowflake implementation services to drive data transformation. It builds scalable streaming and batch data pipelines, optimizes data warehousing for cost-effective analytics and enables AI and ML model deployment using Snowflake ML. DXC also facilitates secure data collaboration through Snowflake's clean rooms and accelerates migrations from legacy systems such as SAP BW.

**Data integration capabilities:** DXC offers the Data Integration Framework (DIF), a metadata-driven platform to streamline data management, integration and processing. Through parameterized configuration files, the framework automates the creation of Snowflake artifacts, such as databases,

schemas, tables and roles. It also offers data services, accelerators and advisory modules, enabling efficient data flow management while ensuring compliance and security.

**Efficient data migration:** The DXC Automated Data Migration Framework (ADMF) streamlines and automates migrations to Snowflake by transferring schemas, data, security roles, users and mappings. It supports resilient pipelines and flexible extraction methods for migration to Snowflake. ADMF integrates GenAI for intelligent ETL migration, enhancing schema conversion and procedures. Its scalable and automated approach reduces complexity and accelerates cloud transitions.

## Caution

Most of DXC Technology's business revenue comes from large enterprise clients. Proactively targeting SMEs could significantly expand its client base and increase future growth opportunities.





# Snowflake Managed and Support Services

## Who Should Read This Section

This report is valuable for providers offering Snowflake managed and support services in Europe to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

### **Business professionals**

should read this report to understand providers' relative positioning and capabilities focused on Snowflake managed and support services.

### **Compliance and governance professionals**

should read this report to understand how providers address data security and privacy requirements in their Snowflake managed and support services portfolio.

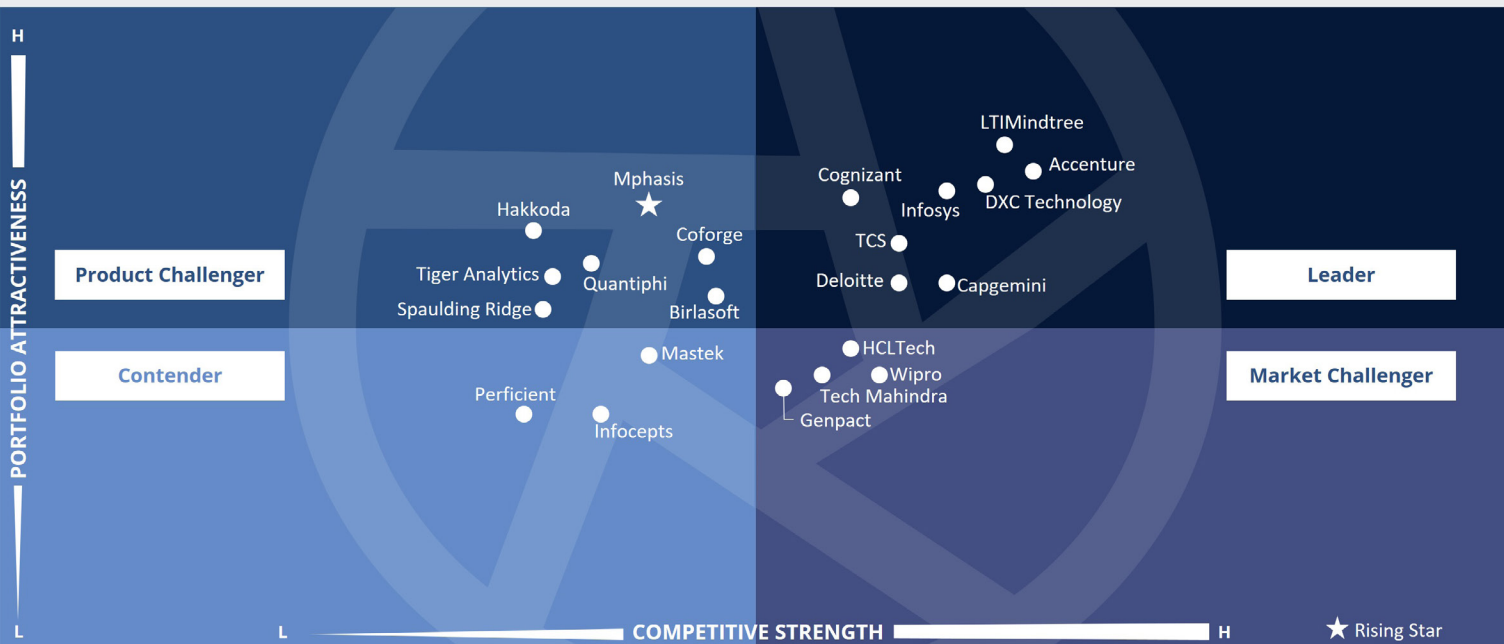
### **Software and technology development leaders**

should read this report to understand how providers' Snowflake managed and support services impact a company's cost optimization initiatives.

### **Procurement professionals**

should read this report to compare Snowflake managed and support service providers in the European market.





This quadrant assesses how providers **operate, monitor** and **optimize** Snowflake environments post-deployment. It emphasizes their ability to deliver **proactive support, cost management** and **continuous performance tuning** at scale.

Hemangi Patel



### Definition

This quadrant evaluates providers offering managed cloud services to manage, maintain and optimize the Snowflake environment for organizations. Providers are expected to offer continuous, proactive monitoring of the Snowflake environment to ensure optimal performance, optimize costs, identify potential issues and minimize downtime.

Key services include regular assessments and diagnostics to optimize query performance, data storage and resource usage. Providers also specialize in establishing and managing backup processes and disaster recovery strategies to safeguard data against loss or corruption.

Other key services include data governance policies and security best practices, ensuring data integrity, confidentiality and compliance with regulations. Providers should also have the ability to manage software updates, patches and feature upgrades on the Snowflake platform, ensuring organizations benefit from the latest enhancements while providing insights and recommendations for optimizing costs.

### Eligibility Criteria

1. Offer **Snowflake-specific managed services**, encompassing implementation, performance monitoring and tuning, optimization, and backup and recovery
2. Expertise in managing Snowflake infrastructure across cloud platforms, including **resource scaling, cost optimization and multicloud/hybrid architecture implementation**
3. Offer **post-implementation support services**, including troubleshooting, performance optimization, upgrades and well-defined SLAs for **optimal uptime, response times and resolutions**
4. Ability to ensure data quality assurance within Snowflake by **monitoring, validating and improving data consistency and accuracy** for analytics
5. **Ability to implement compliance frameworks** within Snowflake, including auditing and reporting for industry regulations
6. **Showcase data security capabilities**, including encryption, access controls and access monitoring
7. Expertise in **automating Snowflake operations**, including job scheduling, scaling and CI/CD management
8. Expertise in optimizing **costs, forecasting and budgeting**, and monitoring usage
9. Demonstrate Snowflake-specific **partnerships**, technical skills and certifications, including access to best practices for **setup, configuration and usage**



## Snowflake Managed and Support Services

### Observations

As Snowflake becomes a foundational platform for enterprise data strategies, the need for continuous monitoring, optimization, governance and operational excellence drives the demand for robust managed services. Service providers are expanding their offerings to deliver 24/7 platform support, performance monitoring and ongoing optimization.

A key focus area is cost governance and FinOps, where providers offer proactive usage monitoring, workload right-sizing and chargeback models to ensure enterprises maximize value from their Snowflake investments. Data observability tools and custom dashboards are used to track pipeline health, latency and data freshness, helping organizations maintain high-quality, reliable data environments.

Providers are embedding governance, compliance and security capabilities by implementing granular access controls, dynamic masking and policy-driven data-sharing frameworks. Automated monitoring solutions help identify anomalies, usage spikes

or potential risks, allowing for faster resolution and compliance with internal and external regulations. Another priority in managed services is the enablement and maintenance of clean rooms for data, where enterprises can collaborate on sensitive data without compromising privacy. Service providers support setup, policy configuration and ongoing governance of clean rooms on Snowflake to derive joint insights while maintaining strict data boundaries.

With managed services extending beyond maintenance to include continuous updates, AI-driven recommendations and optimization, service providers ensure that Snowflake platforms remain secure, cost-effective and aligned with evolving business goals.

From the 27 companies assessed for this study, 22 qualified for this quadrant, with eight being Leaders and one a Rising Star.

### accenture

By integrating Snowflake's dynamic platform with **Accenture's** governance-led approach, organizations can unlock the full value of their data, ensuring trust, driving innovation and enabling data products that deliver measurable business impact.



**Capgemini** is a leader in managed services due to its end-to-end, user-centric solutions that combine advanced analytics, rapid deployment and flexible cloud-native architectures, delivering business value at scale.



**Cognizant's** capabilities to offer an intelligent cost management framework, robust security and compliance practices and AI-driven FinOps capabilities maximize efficiency, compliance and savings, making it a Leader in this quadrant.

### Deloitte.

**Deloitte's** managed services enable clients to obtain actionable insights through AI-powered optimization, implement sustainable infrastructure and secure AI governance, making it a Leader in this quadrant.



**DXC Technology's** strong position is driven by its managed services portfolio, innovative case studies and a strong focus on talent building and learning and development, establishing considerable capacities in this space.



**Infosys** is a Leader in this quadrant for its deep platform expertise, proactive managed services and industry-tailored innovation, enabling enterprises to modernize their data estates, control costs and realize the full potential of their data ecosystems.





## Snowflake Managed and Support Services



**LTIMindtree** leads Snowflake managed services with a strategic cost and sustainability framework, advanced data observability and PolarSled FinOps, ensuring cost efficiency, performance and sustainable cloud operations at scale.



**TCS** delivers integrated managed services for Snowflake that extend beyond monitoring, combining performance optimization through solutions such as SnowMonitor and other services, contributing to its leadership position in the quadrant.



**Mphasis'** DataOps.live for Snowflake streamlines the DataOps lifecycle with agility, automation and governance. Along with Datalytx Sonar for audit assessment and DataDog for real-time observability, it creates comprehensive managed services for the Snowflake environment.





"DXC Technology's managed services portfolio offers comprehensive support for managing environments, subscriptions and deployments. Its proven transformation methodology ensures seamless business architecture transitions."

*Hemangi Patel*

# DXC Technology

## Overview

DXC Technology is headquartered in Virginia, U.S. It has more than 127,200 employees across over 130 offices in 65 countries. In FY24, the company generated \$13.7 billion in revenue, with Global Infrastructure Services (GIS) and Global Business Services (GBS) each making up approximately 50 percent of the annual revenue. DXC has over 300 Snowflake-certified professionals and possesses industry competencies in financial services, travel, retail, consumer packaged goods and manufacturing. Additionally, the company fosters specialized communities, such as the AI Academy, AI Guild and Data Engineering Guild, engaging over 10,000 members to promote continuous learning and professional growth.

## Strengths

### **Comprehensive managed services portfolio:**

DXC offers a broad managed services portfolio that includes security and governance, automated resource scaling, metadata-driven data ingestion and anomaly detection. The company enhances operational excellence through cost-optimized data ingestion and compliance frameworks that ensure GDPR adherence. DXC manages one of Europe's three largest Snowflake customer instances by offering automated FinOps to detect anomalies, analyze trends and size budgets for various domain teams.

### **Focus on learning and development:**

DXC strongly emphasizes training and development, ensuring its workforce remains skilled and competitive. The DXC Learning

Platform provides 24/7 access to over two million learning assets, including Udemy and LinkedIn Learning content. DXC Academies offer structured upskilling and reskilling programs, while Partner Certification Accelerated Learning Paths help employees obtain certifications from technology providers such as Snowflake.

**MLOps capabilities:** The DXC Lightweight MLOps Accelerator for Snowflake enables the rapid deployment of ML use cases by leveraging Snowflake's native features and direct data access. It enhances DevOps integration with versioning, pipelines, quality tests, automation and monitoring, ensuring scalable and efficient ML operations.

## Caution

While DXC emphasizes cost optimization for Snowflake through its comprehensive managed services portfolio, the company can enhance its market competitiveness by introducing a dedicated platform or framework that explicitly highlights its cost optimization and performance capabilities.





# Appendix

The ISG Provider Lens 2025 – Snowflake Ecosystem Partners study analyzes the relevant software vendors/service providers in the European market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of June 2025 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars (\$) unless noted otherwise.

The study was divided into the following steps:

1. Definition of Snowflake Ecosystem Partners market
2. Use of questionnaire-based surveys of service providers/vendors across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following main evaluation criteria:
  - \* Strategy and vision
  - \* Innovation
  - \* Brand awareness and presence in the market
  - \* Sales and partner landscape
  - \* Breadth and depth of portfolio of services offered
  - \* Technology advancements



## Author & Editor Biographies

*Lead Author*



**Hemangi Patel**  
**Senior Manager and Principal Analyst**

Hemangi has 10+ years of experience in the field of strategy research and consulting space especially within ICT sector. She has proven her excellence in delivering projects, that include quality analysis, extensive primary and secondary research, market entry and go-to-market strategy, competitive benchmarking and company analysis, and opportunity assessment. Here at ISG, Hemangi leads research activities for service provider intelligence report in the areas of BPO focused on customer experience and contact center services.

Hemangi holds her Bachelor's degree in commerce from Mumbai University and MSc in Economics from Symbiosis International University, Pune.

*Research Analyst*



**Tanya Varshney**  
**Senior Research Analyst**

Tanya is a Senior Research Analyst with deep expertise in technology research, specializing in emerging trends and innovation. With over five years of experience, she has led primary and secondary research initiatives in AI and analytics and has played a key role in developing ISG Provider Lens ecosystem reports on Google and SAP.

At ISG, she is a vital part of the IPL Custom Research team, driving impactful insights and supporting a diverse range of client engagements and projects.



## Author & Editor Biographies

### Study Sponsor



**Aman Munglani**  
**Senior Director and Principal Analyst**

A recognized thought leader and industry advisor with over 23 years of experience in emerging technologies, Emerging vendors and infrastructure, Aman Munglani has spent much of his professional life advising the C-suite of Global 2000 companies on digital strategies, start-up engagement, innovation, technology roadmaps and vendor management. Prior to ISG, Aman spent twelve plus years at Gartner guiding CIOs and IT managers across Asia Pacific and Europe on emerging technologies, their use cases and maturity, infrastructure trends and technologies, vendor comparisons, and RFP reviews.

He also advised many global and Asia-Pacific vendor organizations on their go to market, product and pricing strategies and applicable competitive scenarios.

### IPL Product Owner



**Jan Erik Aase**  
**Partner and Global Head – ISG Provider Lens/ISG Research**

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes;. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry.

Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



### iSG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

### iSG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

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### iSG

[ISG](#) (Nasdaq: [III](#)) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit [isg-one.com](https://isg-one.com).





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**REPORT: SNOWFLAKE ECOSYSTEM PARTNERS**