ISG Provider Lens™

Snowflake Ecosystem Partners

Snowflake Managed and Support Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

DXC TECHNOLOGY

QUADRANT REPORT | JUNE 2025 | U.S.

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A report comparing providers' capabilities to help decision-makers more effectively source services

In the face of ongoing macroeconomic turbulence and uncertainty, U.S. firms are balancing a push for growth and business innovation initiatives with a heightened focus on risk management and resiliency. This approach is increasing demand for increased cloud-related spending aimed at improving business agility and responsiveness. It is also driving initiatives to enable more effective data-driven decision-making and improve process visibility, predictability and resilience.

In 2025, Tech spending is primarily driven by investments in cybersecurity, infrastructure modernization and cloud adoption, data and analytics, and AI-enabled innovation. These priorities collectively accelerate demand for cloud data platforms such as Snowflake. The platforms enable firms to consolidate and manage diverse data types, including structured and unstructured, into a single platform, eliminating data silos and improving data access, sharing and collaboration across the organization.

The US Snowflake ecosystem is impacted by a number of business priorities:

Enabling data-driven decision-making. While effectively managing data and improving data-driven decision-making have always been important business priorities, organizations now increasingly rely on data analytics to realize these goals. Growing concerns over global supply chain disruptions, heightened by uncertainty and tariff threats, have driven projects focused on enhanced process automation, improved visibility and business continuity. Additionally, the surge in AI awareness, demand and adoption has dramatically increased the importance of data access, quality and management, driving significant changes in the data management landscape and increasing the demand for cloud data management platforms such as Snowflake and related services.

Firms are seeking a **unified cloud data platform** to better **manage complex data environments.**

Enhancing data sharing, collaboration and monetization. Rising labor costs and tech skills shortages are driving initiatives to improve EX, productivity and retention. The constantly shifting dynamics of hybrid work have increased the demand for solutions and platforms that enable collaboration across geographical and organizational boundaries. Cloud data platforms like Snowflake make data sharing and access easier for distributed teams. Providers differentiate themselves by helping organizations access data insights that improve employee productivity and scale nascent AI capabilities. Additionally, leading providers help firms leverage Snowflake's data sharing capabilities and marketplace to create new revenue streams by monetizing data, transforming data into a tangible strategic asset.

Delivering insights for transparency, traceability and reporting. To operate effectively, U.S. firms must navigate a large number of state, federal and global data protection regulations, including CCPA, HIPAA, GLBA, COPPA and GDPR. Organizations are also looking to consolidate and share data to improve their sustainability initiatives, improve internal operations and manage extended supply chains to better measure and reduce carbon footprints. Given these complex requirements, AI-driven insights from a well-managed cloud data management platform are increasingly essential to address compliance challenges, operate effectively across jurisdictions, and achieve sustainability goals.

Ensuring effective data governance and security. Cybersecurity remains a top business priority and challenge, with concerns over data breaches and regulatory compliance putting the focus squarely on robust data governance frameworks and solutions. The growing focus on responsible and ethical AI has accelerated this trend, as increased AI usage necessitates improved data governance. One early benefit of the excitement surrounding GenAI initiatives is that organizations develop a clearer understanding of the importance of data governance and the need for a strong data foundation that supports not only structured but also semi-structured and unstructured data.

Organizations are implementing cloud data platforms to simplify the management of complex data environments through a unified platform. As these firms struggle with the challenges of data scale, security, privacy and accuracy, they will increasingly turn to service providers to understand the functionalities and implications of platforms like Snowflake in addressing their needs. They will also seek help in leveraging the Snowflake platform in production by implementing robust data governance and change management practices (for example, data lineage, access control and audit trails) at scale across hybrid or multicloud environments while adhering to varying regulatory standards across diverse regions and functions.

These business trends are among the key drivers of a changing technology and services landscape, directly impacting the U.S. Snowflake ecosystem. The following section outlines the key technology trends and their impact on the Snowflake ecosystem, especially highlighting the role of service providers.

Data scalability issues and performance bottlenecks. Traditional on-premises data warehouses often struggle to keep pace with the increasing volume, velocity and variety of modern enterprise data. As data grows exponentially, legacy systems become expensive and difficult to scale, resulting in performance degradation, slow query response times and resource contention, especially when supporting concurrent users or running AI and ML workloads. Data cloud platforms such as Snowflake offer elastic architectures that allow enterprises to scale compute and storage independently, ensuring high performance without overprovisioning.

Real-time data processing and edge computing. Accessing, analyzing, visualizing and acting on data in real time is essential for maintaining a competitive edge, enhancing CX and supporting IoT devices, while edge computing reduces latency and bandwidth usage, complementing cloud data platforms. Snowflake supports real-time and near-real-time data ingestion pipelines and analysis, enabling timely data processing closer to data sources to enhance responsiveness and reduce latency.

Cloud migration and hybrid/multicloud complexity. Organizations are adopting hybrid and multicloud approaches and leveraging multiple cloud services for flexibility, performance and redundancy. This includes implementing multicloud Snowflake architectures across AWS, Azure and GCP to ensure resilience and cost optimization. However, managing consistent data architecture, governance and performance across multiple cloud environments is inherently complex, especially for firms migrating from legacy, monolithic data platforms. The issues include data transfer latency, workload reconfiguration, compatibility issues and operational disruption risks. Snowflake simplifies this transition by offering a cloud-agnostic and fully managed architecture. Firms will look to service providers for guidance on leveraging Snowflake as a single, secure data platform across clouds to enable workload portability, regulatory compliance and business continuity without added infrastructure overhead.

Advanced analytics, AI and ML: The integration of advanced analytics, AI and ML into business operations requires robust, scalable data platforms. Legacy systems lack the capability to support modern analytics, AI and ML at scale. Enterprises need platforms that natively integrate with data science tools, support Python or R and allow for in-database ML processing. Firms need service providers' guidance on best practices for leveraging data cloud platforms such as Snowflake, including the use of tools, accelerators and native integration with third-party ML platforms to prepare data, run models and deploy AI/GenAI solutions securely and efficiently.

Unified data management. The exponential growth of data from various sources requires advanced storage and processing capabilities. While cloud data platforms such as Snowflake are designed to manage large volumes of structured and unstructured data efficiently, migrating data from legacy systems to cloud platforms can be complex, costly and time-consuming. Ensuring ongoing integration with existing applications and systems adds an additional layer of complexity. Leading providers excel in helping firms consolidate data lakes, warehouses and real-time analytics into a single Snowflake platform to improve governance, scalability and operational efficiency. This includes implementing data fabric and data mesh architectures to enable more effective data integration and governance across diverse sources.

Data application development. Organizations are increasingly aware of the potential of developing and scaling data-intensive applications while minimizing operational burdens by leveraging a fully managed service such as Snowflake to handle infrastructure concerns such as provisioning, availability and maintenance. Firms with complex requirements are exploring opportunities to monetize their data through data sharing via Snowflake Marketplace. Regardless of the maturity level, firms are expected to increasingly seek providers' guidance on leveraging Snowflake's Native Application Framework to build, test and deploy applications directly within Snowflake, reducing data movement while maintaining tight security and governance.

Cloud cost management and optimization: Adopting a hybrid and/or multicloud approach can potentially reduce infrastructure costs. However, without careful management, cloud usage can become unpredictably expensive, especially concerning storage, compute and data egress charges. Additionally, many firms are not fully leveraging their existing Snowflake investments, either failing to consume the credits they have already purchased or failing to adequately utilize the platform's capabilities across various business functions and corporate domains. This scenario represents a significant opportunity for service providers to help firms optimize the costs of their Snowflake implementation.

In the face of ongoing macroeconomic turbulence and uncertainty, U.S. firms are balancing a push for growth and business innovation initiatives with a heightened focus on risk management and resiliency, fueling initiatives aimed at enabling more effective data-driven decision-making and improving process visibility, predictability and resilience.

Provider Positioning

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	Snowflake Consulting and Advisory Services	Snowflake Implementation Services	Snowflake Managed and Support Services
Accenture	Leader	Leader	Leader
Altimetrik	Contender	Contender	Not In
Birlasoft	Product Challenger	Product Challenger	Product Challenger
Brillio	Contender	Contender	Contender
Capgemini	Leader	Leader	Leader
Coforge	Product Challenger	Product Challenger	Rising Star ★
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader

Provider Positioning

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	Snowflake Consulting and Advisory Services	Snowflake Implementation Services	Snowflake Managed and Support Services
DXC Technology	Leader	Leader	Leader
Genpact	Market Challenger	Market Challenger	Market Challenger
Grazitti Interactive	Contender	Contender	Not In
Hakkoda	Product Challenger	Product Challenger	Product Challenger
HCLTech	Market Challenger	Market Challenger	Market Challenger
Hexaware	Not In	Leader	Not In
Impetus Technologies	Contender	Product Challenger	Contender
Infocepts	Contender	Contender	Contender

Provider Positioning

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	Snowflake Consulting and Advisory Services	Snowflake Implementation Services	Snowflake Managed and Support Services
Infosys	Leader	Leader	Leader
Kipi.ai (WNS)	Product Challenger	Product Challenger	Product Challenger
LTIMindtree	Leader	Leader	Leader
Mastek	Contender	Contender	Contender
Mphasis	Product Challenger	Product Challenger	Product Challenger
Perficient	Contender	Contender	Contender
phData	Rising Star ★	Rising Star ★	Product Challenger
Quantiphi	Product Challenger	Product Challenger	Product Challenger

Provider Positioning

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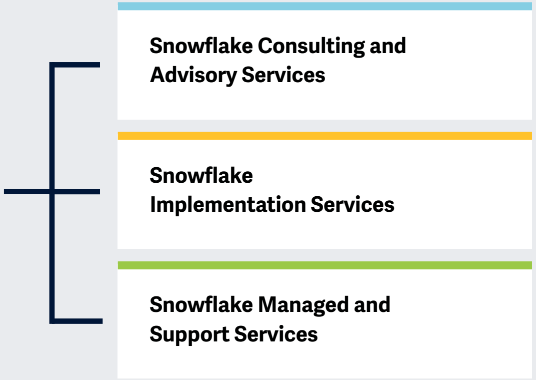
	Snowflake Consulting and Advisory Services	Snowflake Implementation Services	Snowflake Managed and Support Services
Slalom	Leader	Leader	Not In
Spaulding Ridge	Product Challenger	Product Challenger	Product Challenger
Synechron	Contender	Contender	Not In
TCS	Leader	Leader	Leader
Tech Mahindra	Market Challenger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

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 the U.S. and Europe markets

This ISG study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market 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.

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.

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.

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 Managed and Support Services

Who Should Read This Section

This report is valuable for providers offering Snowflake managed and support services in the U.S. 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 centered around Snowflake managed services.

Compliance and governance professionals

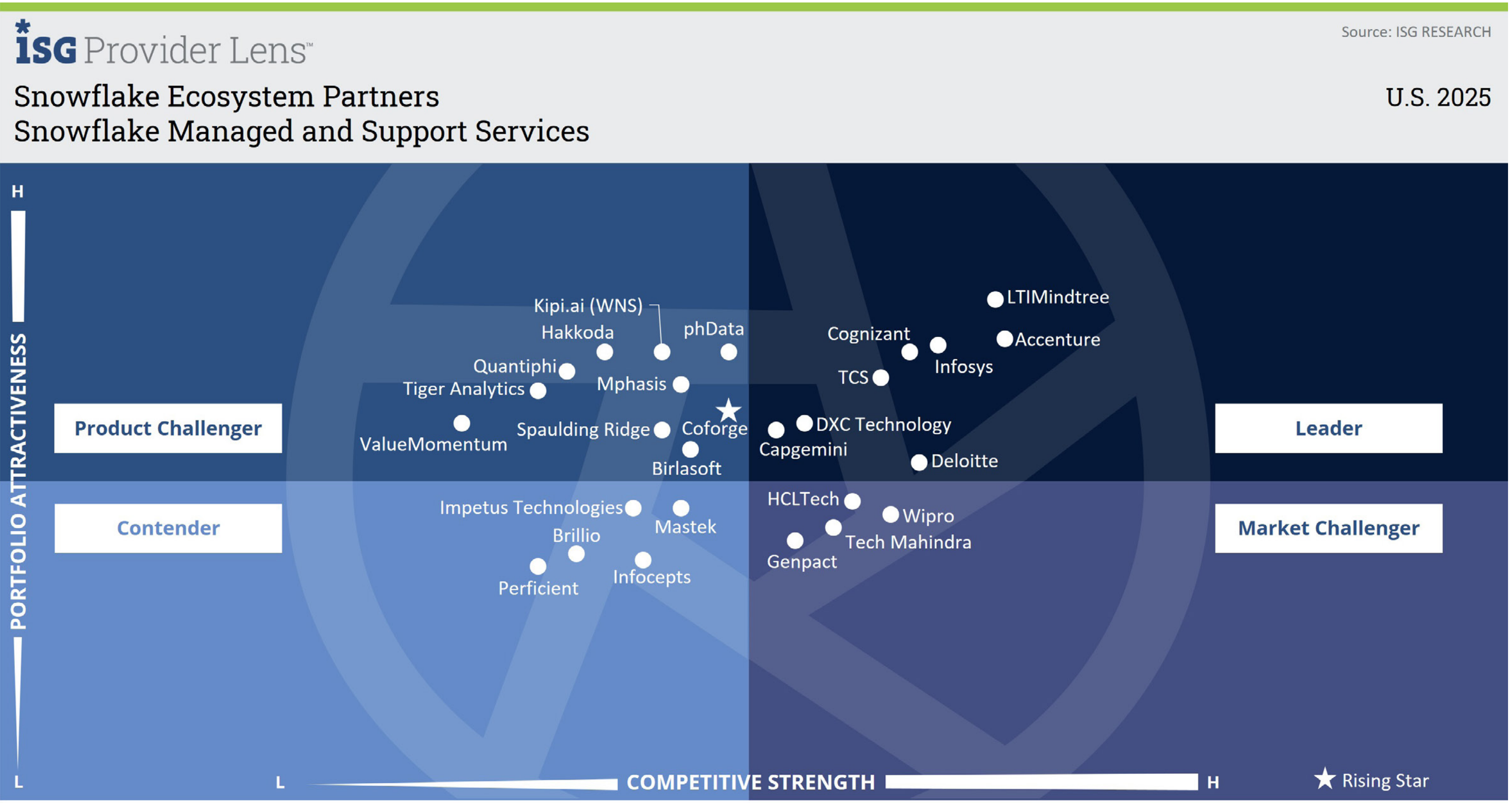
should read this report to understand how providers address data security and privacy needs in their Snowflake managed and support services portfolio.

Software and technology development leaders

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

Procurement professionals

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



This quadrant evaluates providers offering managed cloud services to manage, maintain and optimize the Snowflake environment to **ensure optimal performance, optimize costs**, identify potential issues and **minimize downtime.**

Michael Barnes

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. Providersalso 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**

Observations

Implementing, enabling and optimizing a culture of data-driven decision-making requires ongoing support, such as monitoring, validating and improving data consistency and accuracy to ensure quality. This support drives demand for Snowflake-related managed services. Service providers' offerings include helping firms establish robust data governance frameworks critical to ensuring compliance with industry regulations, especially in sectors such as finance and healthcare.

Equally important, providers are under pressure to support cost optimization, data observability and continuous integration/continuous deployment (CI/CD) mechanisms. They utilize advanced strategies to analyze usage patterns, eliminate unnecessary expenditure and advise clients on efficient resource allocation. Implementing CI/CD mechanisms in Snowflake environments enhances the agility and flexibility of data operations, enabling the rapid deployment of updates and features without significant downtime. This iterative approach ensures that organizations can swiftly adapt to changing business needs swiftly, maintaining a competitive edge in fast-paced markets.

For improved data observability, providers integrate tools that offer real-time monitoring of data flows and transformations, giving organizations insights into the entire data lifecycle, ensuring accuracy, consistency and availability. Additionally, audit tools are implemented to maintain compliance and oversight, providing essential tracking and reporting capabilities. These capabilities allow businesses to proactively identify and resolve issues, fostering accountability and transparency within their data operations.

From the 111 companies assessed for this study, twenty-seven qualified for this quadrant, with eight being Leaders and one a Rising Star.

Accenture has a strong presence in the Snowflake ecosystem in terms of breadth, scale and maturity of its governance-led approach to managed services.

Capgemini's offers extensive managed services, particularly in data platform management and performance optimization, supported by a strong partnership with Snowflake.

Cognizant offers an extensive Snowflake services and solution portfolio, including accelerators, cost management and FinOps capabilities, robust security and compliance services and a strong market presence.

Deloitte benefits from strong credibility and presence among senior business stakeholders, with a significant Snowflake market presence and thought leadership, which is particularly notable within the U.S. public sector.

DXC Technology offers a solid managed services portfolio, which includes strong data infrastructure management and platform modernization services, broad industry solutions, and a strong focus on talent building and learning and development.

Infosys' Snowflake managed services suite offers both scale and depth through its deep platform expertise; industry-specific services, particularly in regulated markets; and platform modernization and management capabilities.

LTI Mindtree offers a deep Snowflake managed services portfolio, including a strategic cost and sustainability framework and advanced data observability capabilities, proven experience and a long-standing partnership with Snowflake.

TATA CONSULTANCY SERVICES

TCS delivers integrated Snowflake managed services through its strong data migration and performance optimization capabilities, long-standing partnership with Snowflake and a global footprint.

Coforge

Coforge (Rising Star), a midsize provider, experiencing rapid growth through organic and inorganic expansion, with a focus on digital transformation through cloud services and AI solutions, targeting banking, insurance, travel and healthcare sectors.

Leader

"DXC Technology's strong data infrastructure management and platform modernization services, industry solutions and Elite partner status qualify it as a Leader in this quadrant."

Michael Barnes

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 roughly 50% of the annual revenue. DXC has over 300 Snowflake-certified professionals and 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

Focus on learning and development: DXC has proven capabilities in training and development, ensuring its workforce remains skilled and competitive. The DXC Learning platform provides 24x7 access to over two million learning assets, including content from Udemy and LinkedIn Learning. DXC Academies offers a portfolio of continuous learning and certification programs, including structured upskilling and reskilling programs and accelerated partner certification paths to help employees gain certifications from technology providers such as Snowflake.

Comprehensive managed services portfolio: DXC's managed services capabilities include security and governance, automated resource scaling, metadata-driven data ingestion and anomaly detection. DXC enhances operational excellence with cost-optimized data ingestion while its compliance frameworks ensure GDPR adherence. It also has proven FinOps capabilities for enterprise-scale Snowflake implementations.

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

DXC Technologies has a comprehensive Snowflake managed services portfolio. However, to maintain its leadership position, the company should promote capabilities that help firms innovate, including using AI and advanced analytics.

Appendix

The ISG Provider Lens 2025 – Snowflake Ecosystem Partners study analyzes the relevant software vendors/service providers in the U.S. 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 conducted in 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

Lead Author

Michael Barnes
Lead Author

Michael is a globally recognized speaker and author with over 25 years of research and consulting experience. He helps senior decision-makers across the Asia Pacific region rethink their business and technology strategies to become more sustainable and compete more effectively in the digital age.

Prior to joining Tech Research Asia, Michael was a Vice President, Research Director at Forrester Research for over 15 years, where he led Forrester's Asia Pacific Digital Business Strategy and Customer Experience services and Sustainability research across this region.

Michael also led Software Infrastructure and Application Integration research in Asia Pacific for Gartner, advising large organizations on strategies for sourcing, implementing, and managing enterprise applications and software technologies. He also conducted software research, advisory and implementation at Meta Group and Hurwitz Group.

At ISG, he has worked on Microsoft, Snowflake and VMware Ecosystem studies.

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.

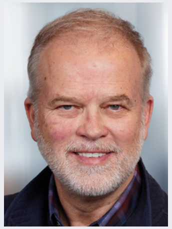
Study Sponsor

Aman Munglani
Senior Director & 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™

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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.

JUNE, 2025

REPORT: SNOWFLAKE ECOSYSTEM PARTNERS