

TBR CASE STUDY

Insight Center for Ecosystem Intelligence

TBR

TBR data estimates 83% of total Enterprise IT spend will go through a multivendor ecosystem of partners and alliances

CLIENT CHALLENGE

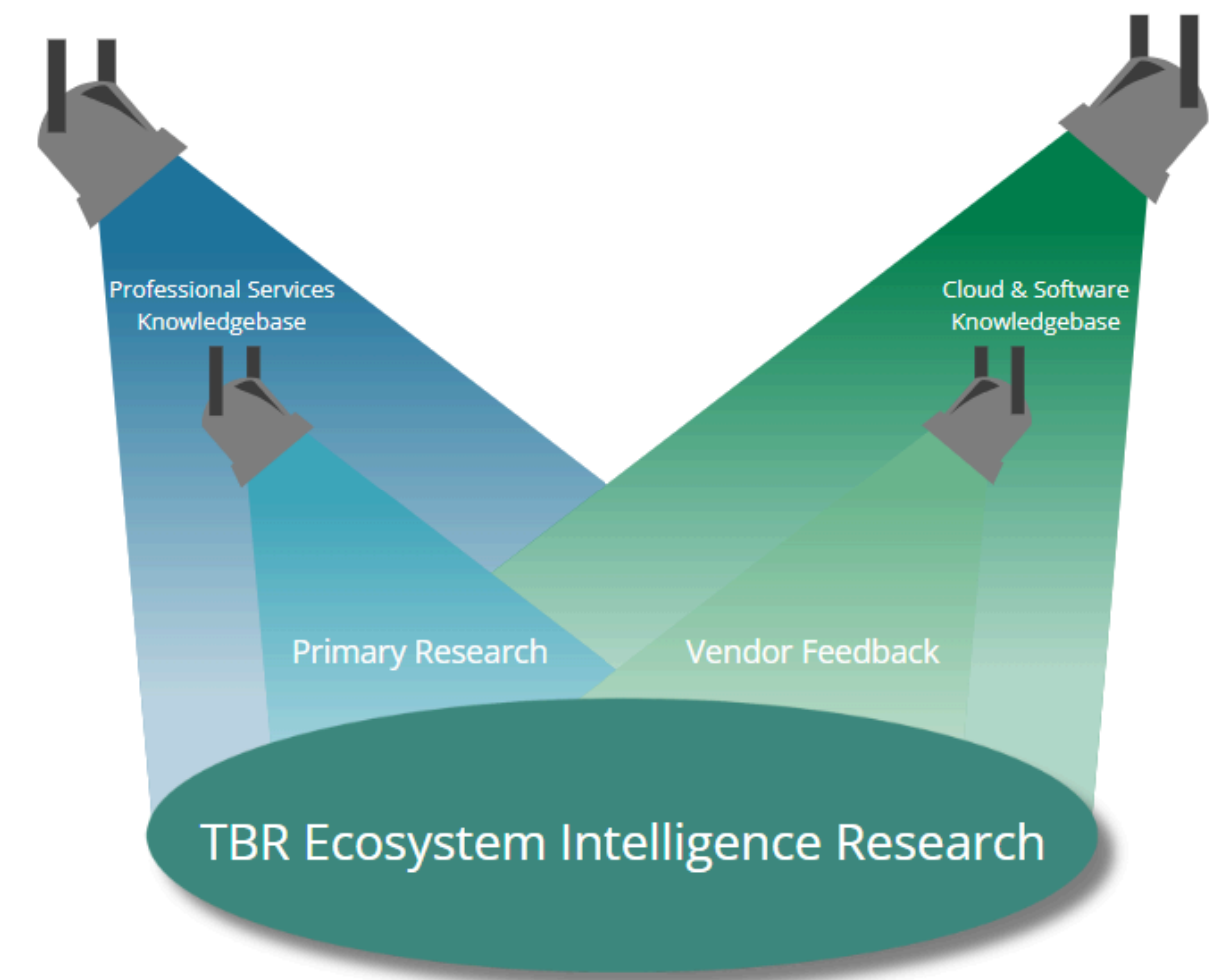
In just a few short years, leading global systems integrators have gone from vendor agnosticism to overt or covert favorites among ISV, hyperscaler and OEM partners. Planning, managing and enabling design-with, build-with, sell-with and sell-through alliances has become a highly competitive and high-stakes game of cross-team training and certification, engineering collaboration, and technical as well as commercial alignment.

TBR's Ecosystem Intelligence allows alliance participants and aspiring partners to objectively measure revenue, headcount and credential data of the top GSI technology alliance teams, by region.

HOW INSIGHT CENTER™ CAN HELP

TBR Insight Center™ delivers objective data and analysis on the top 400-plus tech companies, spanning go-to-market, financial and operational strategies. Curate insights, collaborate with colleagues, and explore in-depth intelligence across telecom, cloud and software, systems integrators, and consultancies.

TBR's research dives into sizing of market opportunities, verticals, use cases, adoption trends and competitive performance. With Insight Center, access data detailing over \$3 trillion in benchmarked revenue and expense as well as more than 4 million unique data points across the broader IT ecosystem, updated quarterly, and able to be fed directly into enterprise AI business intelligence tools.



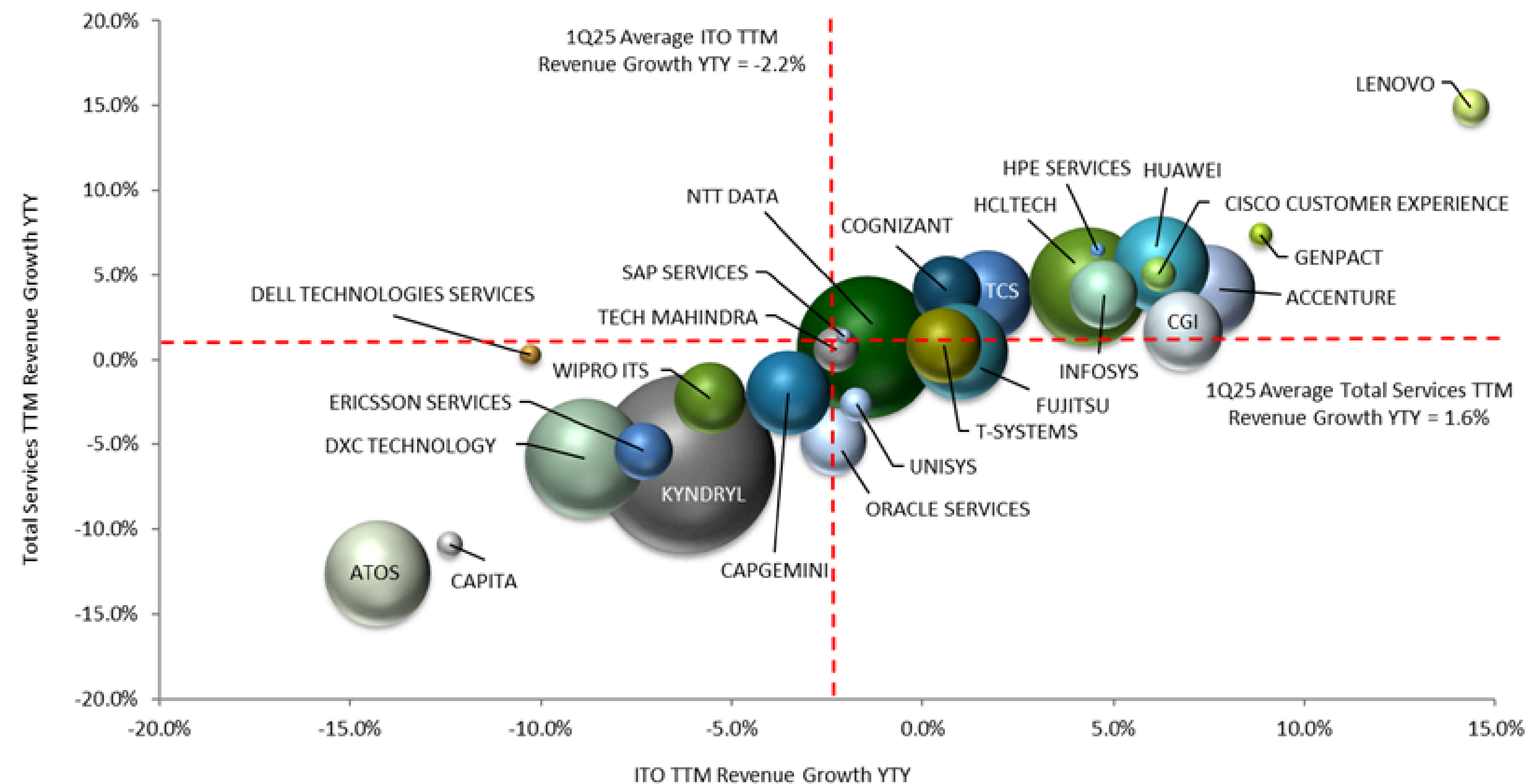
TBR proprietary data helps teams highlight apples-to-apples comparisons of trailing 12-month ecosystem data points including revenue, headcount, credentials, and quarterly revenue of top 20 systems integrators by ITO, BPO, AO and C&SI as well as geographic headcount breakout data for the top 20-plus systems integrators.

“This platform is more intuitive than Gartner’s and other research platforms we use.”

— Product Manager, Fortune 500 IT Services Provider



1Q25 ITO SERVICES TTM REVENUE AND YTY GROWTH



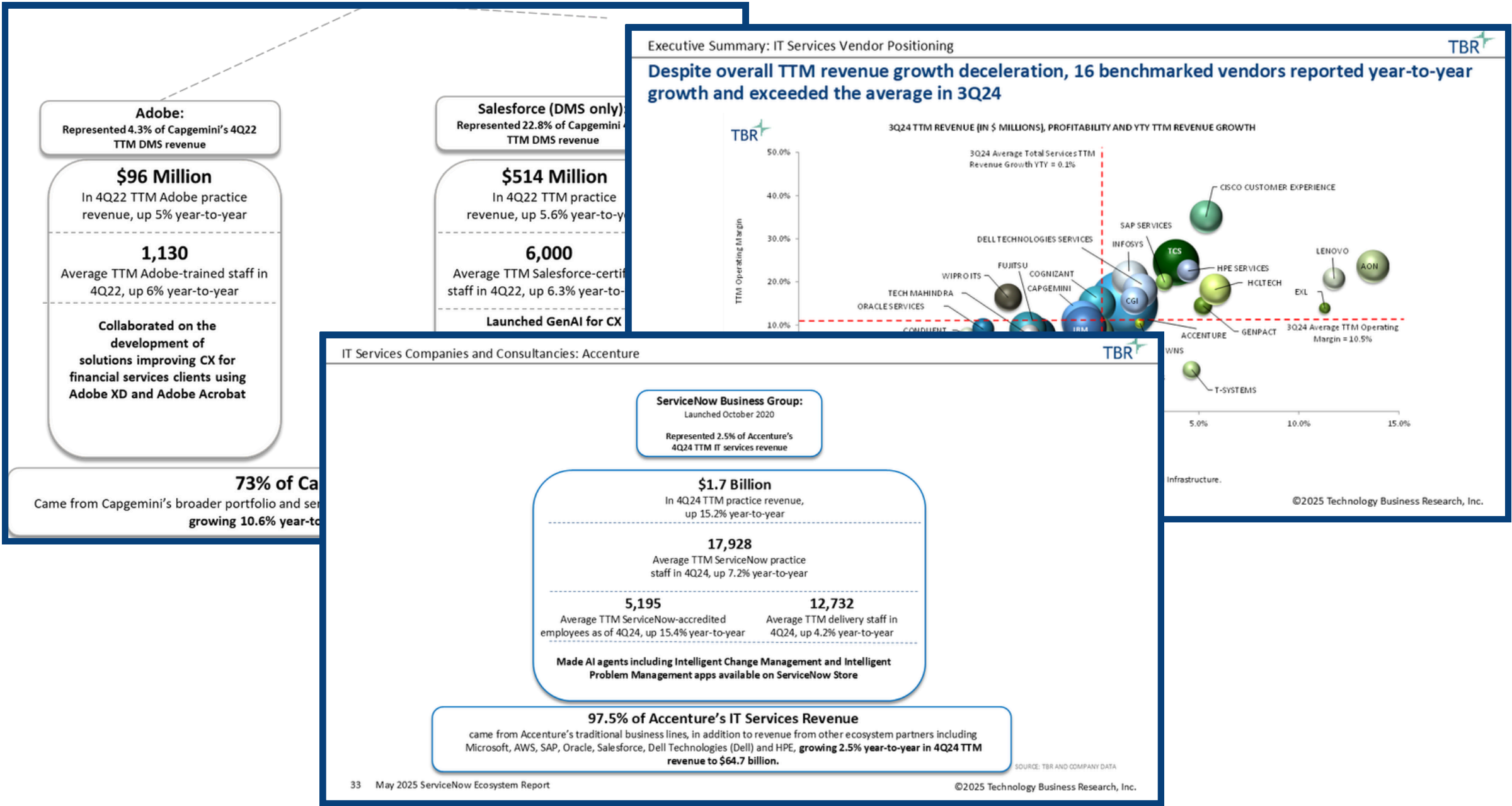
SOURCE: TBR ESTIMATES AND COMPANY DATA

Note: Sphere size reflects volume of TTM revenue.

Competitive and Market Intelligence

Your alliance team partnered with Accenture may know all they need to know about Accenture, but do they know how Accenture partners with your competitors?

- Complete teardown of major vendors within your core business segments
- P&L performance, deals, alliances and go-to-market motions assessed in an apples-to-apples comparison for easy benchmarking



“These [Insight Center] boards will help us keep our competitor stories straight.”

— Vice President of Competitive Intelligence, Top 3 Global OEM

Click here to download full TBR Insight Center Ecosystem Intelligence board.

Partner Enablement

Partner marketing teams often rely on TBR’s objective analysis to substantiate claims and document partner success in outbound, partner-facing and client-facing collateral.

- Independent and validated analysis of the performance of your partners and their peers
- Best practice takeaways and validated data on revenue, headcount and partner ecosystems to map opportunity trends and growth trajectories and to validate staffing, R&D and marketing investment

SPECIAL REPORT

Informatica’s Alliance Strategy: Powering GSIs, Scaling AI and Strengthening the DACH Region

Authors: Patrick Heffernan (patrick.heffernan@tbri.com), Principal Analyst; Catie Merrill (catie.merrill@tbri.com), Senior Analyst; and Boz Hristov, Principal Analyst
March 25, 2025

Informatica uses the ‘power of three solutions’ to bolster its ecosystem

An increasing amount of research and analysis time at TBR is focused on ecosystem intelligence, which applies a set of questions and framework to understand a company’s competitive intelligence and competitive intelligence approaches in an effort to better understand a market. Recently, TBR analysts spoke with Informatica President, Global Partners, and his insights into the actions the company is taking to enhance its alliance relationships with nine key partners. We believe Informatica is doing the following things really well:

- Cloud Vendors
- Partners appear satisfied with cloud vendors; AWS and Microsoft expose them to risk and opportunity when operating at scale while Snowflake shows how staying agnostic helps it

Satisfaction with cloud partners

- **AWS has the most diversified partner feedback among all the profiled vendors. This is not surprising given the company’s share in the public cloud space**, which exposes it to various scenarios where it can experience a backlash. Still, over half of the respondents who work with AWS appear to be very satisfied with their relationship, which likely reflects its efforts to respond to feedback from clients asking for more understanding of their specific industry and business problem. By integrating the teams that align closely with partners with those that focus on business development and support customers throughout the product life cycle, AWS increases its chances of going to market as one team and improving customer outcomes. Meanwhile, AWS continues to articulate its commitment to the ecosystem, but the company risks alienating partners as it continues to expand its portfolio and position itself as a complete end-to-end cloud service provider.
- **Microsoft appeals best to partners, as 58% of respondents working with the company claimed they were very satisfied with their relationship.** As part of the company’s broader growth strategy, Microsoft has moved quickly to emphasize AI within its partner ecosystem, which is now called the Microsoft AI Cloud Partner Program. In January Microsoft rolled out three new channel partner benefits packages: Partner Launch, Partner Success Core and Partner Success Expanded. In addition to offering discounted access to AI tools like Microsoft Sales Copilot, each level complements existing channel partner packages and offers additional benefits, including involvement in Microsoft’s AI go-to-market efforts.
- The fact that Snowflake’s platform runs on any infrastructure and reduces vendor lock-in is deemed highly valuable by customers, which is also appreciated by partners, as evidenced by 88% of the profiled partners working with the company expressing satisfaction. This degree of flexibility, combined with a broader set of features and capabilities than what the hyperscalers can provide, makes Snowflake a worthwhile investment on top of paying for Microsoft Azure, AWS or Google Cloud.

20 Summer 2024 Voice of the Partner Ecosystem Report

SPECIAL REPORT

SoftwareOne strategy brings speed, ease, flexibility and low cost to SAP clients in DACH region

Authors: Patrick Heffernan (patrick.heffernan@tbri.com), Principal Analyst
Boz Hristov, Principal Analyst
Allan Krans, Principal Analyst
Alex Demeule, Analyst
June 25, 2024

A look at SoftwareOne’s strategy for SAP clients in DACH

In a June chat with SoftwareOne’s DACH (Germany, Austria and Switzerland) leadership, TBR came away with three observations on what might make SoftwareOne a potentially unique player in the SAP ecosystem. At a minimum, SoftwareOne in DACH appears to be taking a different approach to the market opportunities created by the confusion around RISE with SAP, GROW with SAP, migrations to S/4HANA, and the 2027 deadline for the end of ECC support. From the presentation by and discussion with SoftwareOne’s Stephan Timme, president DACH; Vincenzo Boesch, sales leader for SAP Services; and Oliver Berchtold, service director DACH, TBR noted that:

- SoftwareOne remains focused on customers’ current SAP environments and helping those customers get to S/4HANA and to the cloud. SoftwareOne is decidedly not focused on business processes. TBR believes that distinction, while subtle, matters because almost every other IT services company and consultancy in the SAP ecosystem of SoftwareOne’s scale and larger starts with identifying business problems and processes that need to be fixed and then declaring, “Hey, look at that, SAP RISE is a perfect solution to fixing these problems!” SoftwareOne

Cloud Vendor	Very dissatisfied	Dissatisfied	Neither satisfied nor dissatisfied	Satisfied	Very satisfied
Adobe (n = 11)	0%	0%	0%	0%	9%
Alibaba (n = 5)	0%	0%	0%	0%	40%
AWS (n = 16)	0%	0%	0%	13%	45%
DataBricks (n = 4)	0%	0%	0%	25%	0%
Google Cloud (n = 13)	0%	0%	0%	15%	46%
Microsoft Azure (n = 12)	0%	0%	0%	17%	25%
Oracle (n = 9)	0%	0%	0%	44%	0%
Oracle Cloud Infrastructure (n = 2)	0%	0%	0%	50%	0%
Palo Alto (n = 1)	0%	0%	0%	0%	100%
Red Hat (n = 5)	0%	0%	0%	0%	60%
Salesforce (n = 8)	0%	0%	0%	25%	38%
SAP (n = 14)	0%	0%	0%	7%	43%
ServiceNow (n = 9)	0%	0%	0%	33%	33%
Snowflake (n = 8)	0%	0%	0%	0%	88%
Workday (n = 4)	0%	0%	0%	50%	0%

SOURCE: TBR 5/24

©2024 Technology Business Research, Inc.

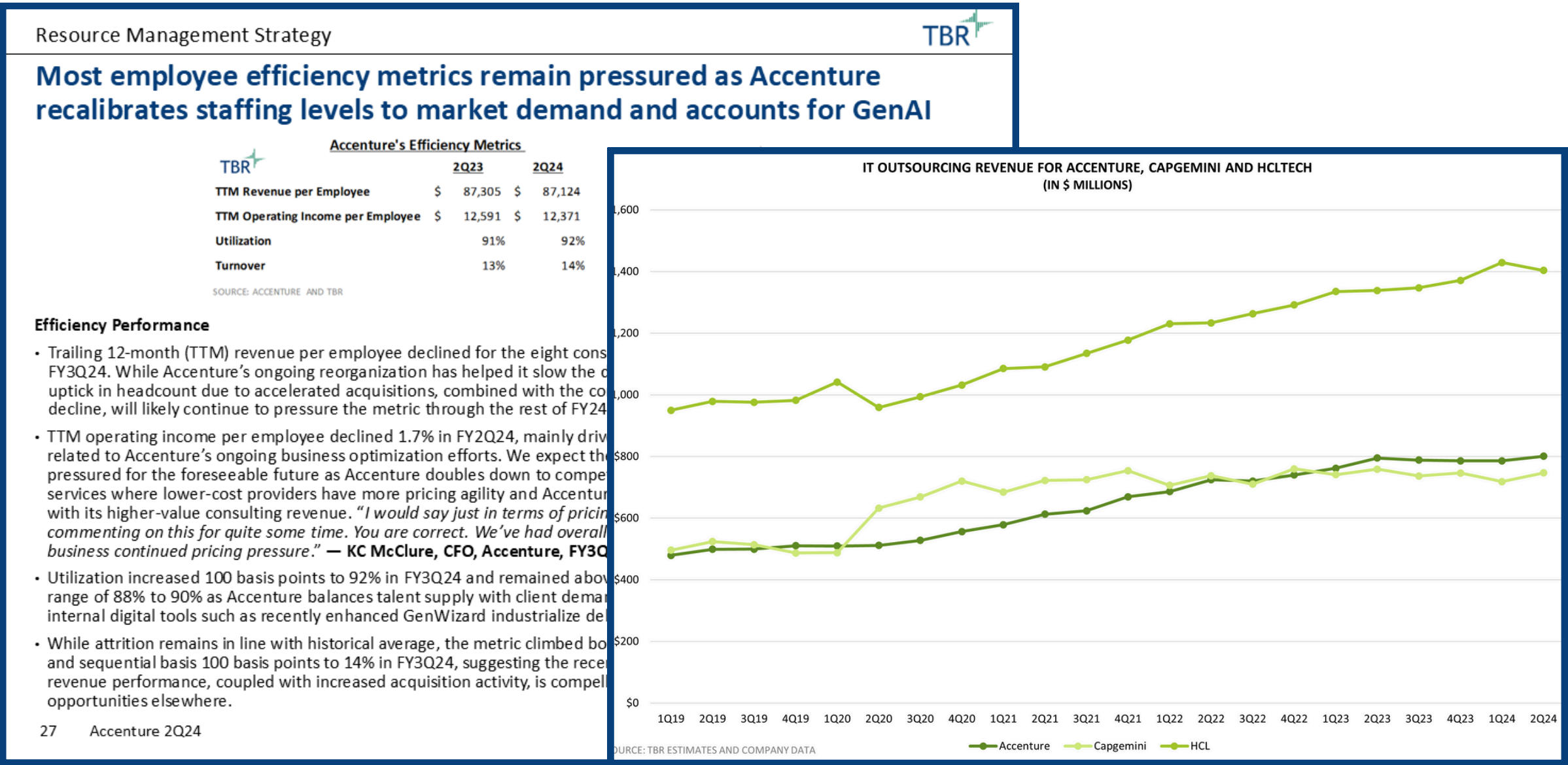
“TBR is my go-to for executive-facing intelligence because their work can be directly implemented into our strategy canvases. We regularly make decisions based on TBR insights.”
— Global Program Director of Market Intel and Advisory, Fortune 50 Technology and Services Firm

Click here to download full TBR Insight Center Ecosystem Intelligence board.

Strategy and Planning

Executive decisions on staffing, resourcing and funding marketing spend, training hours, and certifications depend on dependable partner data. TBR tracks services revenue of the top 20-plus global systems integrators and revenue of all leading enterprise ISVs and hyperscalers.

- Validated, outside-in view on key vendors in cloud, services, telecom and infrastructure
- Consolidated view on peers’ investment agenda, strategic initiatives and M&A activities



“This will save me and my team time each quarter as we compile the Big Four comps.”

— Global Strategy & Innovation Director, Global Tax, Audit and Advisory Services Firm

Click here to download full TBR Insight Center Ecosystem Intelligence board.

Trillions in revenue
Billions in profit
Thousands of insights

All in one dashboard

Start your Insight Center
60-day free trial today.

Who Uses TBR Research? ...and Why?

Top 5 Titles of TBR Readers

- Sr. Director, Alliances/Partners
- Sr. Director, Product/Service Management
- VP, Product/Service Management
- Sr. Director, Strategy
- Sr. Director, Product Marketing

Top 4 Use Cases of TBR Readers

- Competitive/Market Intelligence
- Alliance Strategy and Management
- Operational Benchmarking
- Commercial Ecosystem Management (Best Practices, Resourcing and Investment Decisions)



24,000+ Readers per Month

1,000+ Equity Analyst Readers (Buy/Sell) per Month

10 of the Top 10 Global Systems Integrators

4 of the Top 5 Telco Vendors

Top 3 Hyperscalers

3 of the Top 4 IT Infrastructure OEMs

4 of the Top 6 U.S. Federal Systems Integrators

7 of the Top 12 Management Consultancies