

The Databricks partner ecosystem

Market Research · September 2026

A crowd-phase channel sitting on the highest-priced work in enterprise software. Data and analytics partners clear a 16.3x EBITDA median - and this ecosystem is almost entirely unconsolidated.

Now, for tomorrow

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Executive Summary

Databricks is a crowd-phase ecosystem attached to the highest-priced category of partner work in the study. Data and analytics consultancies carry a 16.3x EBITDA median — above cybersecurity at 16.1x and roughly double the systems-integration band — and every AI workload an enterprise deploys needs a governed data foundation first. What the channel does not yet have is consolidation: Databricks carries no verified partner-firm deal count in the 1,364-deal dataset, entry remains easy and certifications discriminate weakly. The result is an unusual combination for an acquirer: premium end-work, commodity entry conditions, and no established buy-side to bid against.

Crowd

LIFECYCLE PHASE

Entry stays easy, partner count grows, certifications discriminate little. M&A has not yet begun.

16.3x

DATA & ANALYTICS EBITDA MEDIAN

The highest-valued subsector in the study — first quartile 10.7x, third quartile 27.1x.

None

VERIFIED PARTNER-FIRM DEALS

No entry in the per-ecosystem table. The channel is unmeasured, not consolidated.

2.2x+

REVENUE MULTIPLE, VALUE-ADDED POLE

Data and AI consultancies and IP-rich ISVs against 0.5x for licence resale.

Grows

FIRM-COUNT DIRECTION

Crowd ecosystems add firms at high single digits while mature channels shed them.

40% by 2026

ENTERPRISE APPS WITH AI AGENTS

Gartner projection, from under 5% in 2025 — and every agent needs governed data.

Time but act

SELL-TIMING READ

No scarcity clock, but early movers risk locking up the category.

Bought, not built

WHAT THE GSIS ARE DOING

Accenture's Keepler, RANGR Data and Faculty run is data and AI capability acquired outright.

Sources: Aventis Advisors subsector medians (data and analytics 16.3x EBITDA, first quartile 10.7x, third quartile 27.1x; value-added pole 2.2x-plus revenue; VAR 0.5x) and the 1,364-deal per-ecosystem table, which carries no Databricks entry; lifecycle-phase assignment (crowd); Gartner agentic-AI projection; Accenture capability-acquisition run; all as cited in Baker Tilly, *The Enterprise Software Partner Ecosystem* (Sept 2026).

Scope & Definition

The unit of analysis is the partner firm, not Databricks and not the end customer. Databricks consumption revenue is out of scope. This ecosystem carries no verifiable partner count in the reference table, so no density ratio is quoted — a deliberate omission rather than a gap, since inventing a denominator to produce a percentage is exactly the error this methodology exists to avoid. What can be stated with confidence is the phase, and the phase is what sets the acquisition logic.

Premium work, commodity entry conditions

The combination that makes this ecosystem unusual

What the work is worth

16.3x

EBITDA median, data & analytics

The highest-valued subsector in the study, ahead of cybersecurity at 16.1x and double the SI band.

THIRD QUARTILE: 27.1x

What the channel looks like

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lifecycle phase

Entry easy, count growing, certifications discriminate little, no verified partner M&A yet.

NO DENSITY QUOTED

THE PRACTICAL CONSEQUENCE

A buyer can acquire firms doing the study's best-paid work without paying a scarcity premium, because the program has not yet created scarcity. That gap between what the work earns and what the channel costs is the entire thesis here — and it closes the moment Databricks tightens its tiers.

In scope, by partner function

Resellers; global and regional systems integrators; data and AI implementation consultancies, **the prime buy-and-build target and the highest-priced partner type in the study**; managed service partners running platforms and pipelines; ISV and technology partners; training and enablement partners.

Counting rules applied

- → **No invented denominator.** Where the report has no verifiable partner count, it declines to compute density.
- → **Never sum across vendors.** The ten global system integrators hold top-tier Databricks status and top-tier status in nearly every other program simultaneously.
- → **Estimates are labelled.** Where a figure is a Baker Tilly estimate rather than a disclosure, this deck marks it INDICATIVE in place.

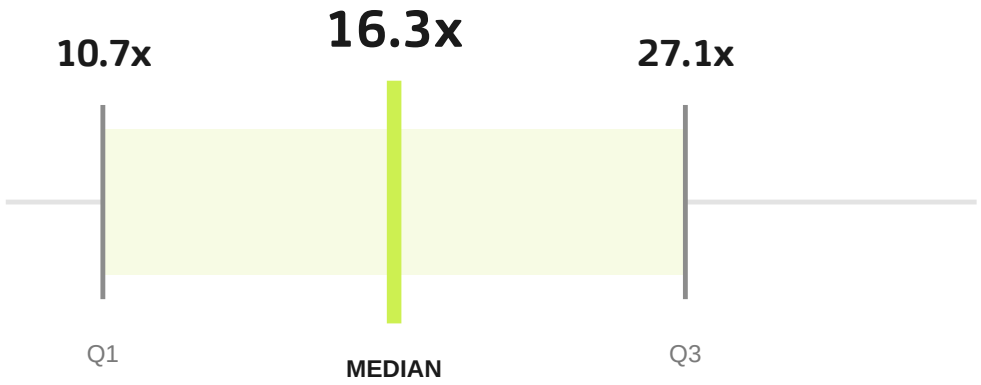
Sources: verified partner-count reference table and standing methodological rules in Baker Tilly, *The Enterprise Software Partner Ecosystem* (Sept 2026), which assigns Databricks to the crowd phase and carries no verifiable partner count for it; Aventis Advisors subsector medians (data and analytics 16.3x EBITDA, first quartile 10.7x, third quartile 27.1x; cybersecurity 16.1x).

Segmentation

The data and analytics subsector has the widest quartile spread of any category in the study — a first quartile of 10.7x EBITDA against a third quartile of 27.1x around a 16.3x median. That spread is the segmentation story: two firms doing nominally the same Databricks work can be valued two and a half times apart. What separates them is IP, recurring share and vertical depth, not certification, because in a crowd ecosystem the certification is easy to hold and therefore prices nothing.

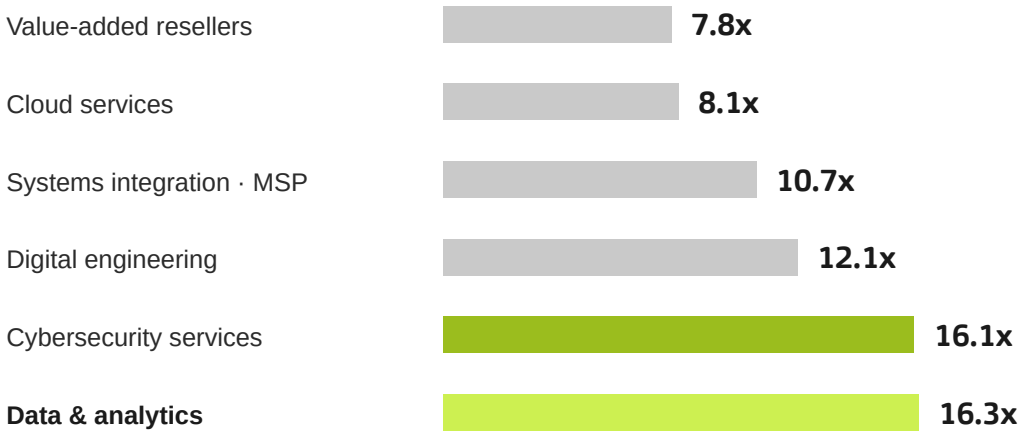
The widest spread of any subsector

Data & analytics EV / EBITDA, quartiles around the median



Where data sits against everything else

EV / EBITDA subsector medians



WHAT MOVES A FIRM ACROSS THE RANGE

Proprietary IP and accelerators, recurring share, and vertical depth. Not headcount, and in a crowd ecosystem not certification either — the badge is easy to hold.

SCALE STILL MATTERS

EBITDA medians rise from 6.7x below USD 5m enterprise value to 12.7x above USD 500m. Scale alone is worth roughly six turns, independent of subsector.

Sources: Aventis Advisors subsector EBITDA medians and quartiles (data and analytics 16.3x median, 10.7x first quartile, 27.1x third quartile; cybersecurity 16.1x, digital engineering 12.1x, systems integration and MSP 10.7x, cloud services 8.1x, VAR 7.8x) and deal-size bands (6.7x below USD 5m EV to 12.7x above USD 500m); crowd-phase segmentation analysis; all as cited in Baker Tilly, *The Enterprise Software Partner Ecosystem* (Sept 2026).

Competitive Landscape

Crowd ecosystems are dominated by proliferating boutiques and mid-market specialists, with certification thin relative to headcount and no scarcity for a buyer to arbitrage. That describes the Databricks channel — but with one important difference from Freshworks, the other crowd ecosystem in this set: the work these boutiques do is the work strategics are paying premiums for elsewhere. The GSIs are already buying data and AI capability aggressively; they have simply not yet organised that buying around this ecosystem's badge.

Where Databricks sits in the lifecycle

Four-phase partner-ecosystem model

1 Open Door	2 Crowd	3 Gate	4 Maturity
Anthropic	Snowflake, Freshworks	AWS, ServiceNow	SAP, Salesforce, Oracle



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WHAT THE PHASE IMPLIES

Partner count grows, entry stays easy, certifications discriminate little and partner M&A has not begun. No scarcity premium to arbitrage — but also no competitive tension, on work that strategics are paying 16x-plus for in other ecosystems.

Who is buying this capability already

- → **Global system integrators.** Accenture leads the sector at 201 verified acquisitions with an FY26 acquisition-spend target near 9bn dollars, and its 2025–26 run — Keepler, RANGR Data, Faculty, NeuraFlash — is explicitly data and AI capability. Strategics pay a median 9.8x EBITDA.
- → **PE platforms.** Sponsors drove over 27 percent of all deals and pay a median 11.5x EBITDA, buying sub-5m-EBITDA firms at 5–8x into platforms valued 10–14x. No named Databricks platform exists yet.
- → **Frontier-AI services vehicles.** Ode with Anthropic at roughly 1.5bn dollars and the OpenAI Deployment Company at over 4bn dollars on a 14bn-dollar valuation recruit from the same talent pool.
- → **What is missing.** A platform organised around this ecosystem specifically. The capability is being bought; the channel is not being consolidated.

Sources: crowd-phase competitive-structure analysis and the five acquirer archetypes in Baker Tilly, *The Enterprise Software Partner Ecosystem* (Sept 2026); Aventis Advisors acquirer league table and sponsor-vs-strategic multiples; Accenture capability-acquisition run (Keepler, RANGR Data, Faculty, NeuraFlash); Ode with Anthropic and OpenAI Deployment Company formation data.

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Relevant Transactions & Takeaways

There are no Databricks-specific partner-firm transactions to report. The reference set below is what a buyer or seller in this channel will actually be priced against: the data and AI capability acquisitions happening right now in adjacent ecosystems, and the platforms assembled in crowd channels once they gated. Every one was done in a market that had no comparable transactions at the time either.

TRANSACTION	ACQUIRER	YEAR	VALUE / MULTIPLE	WHY IT IS THE ANALOGUE
Keepler Data Tech	Accenture	2026	**n.d.**	Cloud-native data engineering bought outright — the closest analogue to a Databricks partner asset in the dataset.
RANGR Data	Accenture	2026	**n.d.**	Same capability run, bought in sequence rather than assembled internally. Evidence of what data capability is worth to a strategic.
Faculty	Accenture	2026	**~$1bn**	Applied-AI services plus a proprietary decision-intelligence product; 400-plus staff. FT framing; terms undisclosed.
Artium	AlixPartners	2026	**n.d.**	78 employees bought for tiered relationships with both OpenAI and Anthropic — accreditation as the scarce asset.
Thirdera	Cognizant	2023	**~$430m**	What a platform built in a crowd channel becomes once the ecosystem gates — the exit an early consolidator underwrites.
Perficient	EQT / GIC	2024	**~18.5x EBITDA**	Sponsors pay far above the 11.5x median for scaled multi-platform assets. Estimate on disclosed reporting.

1 Premium work, no premium price

16.3x end-work in a channel with no scarcity clock and no competing platform. That gap is the thesis.

2 Underwrite IP, not certification

The badge prices nothing in a crowd phase. Accelerators, recurring share and vertical depth do.

3 Buy the team, plainly

Data and AI engineers cannot be recruited at scale. That is why the GSIs are buying whole firms.

4 Sell governance as annuity

The EU AI Act and DORA make auditability a standing obligation. Retainers, not deliverables.

5 Watch for tier tightening

The moment thresholds rise, scarcity appears and the buy-side arrives. That is the window being bought.

Sources: Aventis Advisors named-deals reference table (Accenture / Keepler and Accenture / RANGR Data 2026; Accenture / Faculty ~USD 1bn on FT framing with terms undisclosed; AlixPartners / Artium, announced 4 August 2026, 78 employees; Cognizant / Thirdera ~USD 430m 2023; EQT and GIC / Perficient ~18.5x EBITDA, estimate on disclosed reporting); all as cited in Baker Tilly, *The Enterprise Software Partner Ecosystem* (Sept 2026). No Databricks partner-firm transactions are recorded in that dataset. n.d. = value not disclosed.

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