

GlexScale Market Fit Scorecard

GMFS ANALYSIS REPORT

Company: ~~Confidential Technologies~~

Solution: India-delivery IT services — staff augmentation, cloud migration, ERP implementation, data engineering & managed services

Existing Presence: Dubai, UAE (existing office)

Markets Assessed: UAE/GCC · United Kingdom · Netherlands · Belgium · Germany · Saudi Arabia · France

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Date: March 2026

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SECTION A — PER-MARKET DEEP DIVE

Each market profile includes: sub-metric scores table (all six dimensions), dimension rationale (3–5 sentences), GMFS composite, and top 2 opportunity drivers and top 2 risks.

Market Deep Dive · Priority #1

UAE / GCC

GMFS Composite Result

GMFS Composite Score	Band	Priority Rank	Recommendation
77.4	Strong Fit	#1 of 7	Execute

Dimension Score Overview

EPI (×0.25)	BRS	CFS (×0.20)	TDAS (×0.15)	OCF (×0.15)	SALI (×0.10)
83.0	35.0	75.8	78.0	84.3	73.8

EPI — External Pull Index | Weight: ×0.25 | Score: 83.0

Sub-Metric	Score (0–100)	Evidence Note
Market Size & Growth Rate	82	USD 5.9–20.24B; 9.1–13.2% CAGR; cloud at 20.75% CAGR [Fact]
Regulatory-Driven Demand	85	PDPL enforcement, 9% CIT ERP upgrade wave, federal cloud-first [Fact]
Talent Shortage / Competitive Pull	80	68% of UAE firms report difficulty hiring senior tech talent locally [Fact]
Digital Transformation Urgency	85	GenAI adoption 81%; UAE AI Strategy 2031 targeting 14% of GDP [Fact]
DIMENSION SCORES (Average)	83.0	<i>Average of sub-metric scores above</i>

BRS — Barrier to Reach Score | Weight: ×0.15 (inverted: 100–BRS) | Score: 35.0

Sub-Metric	Score (0–100)	Evidence Note
Language & Cultural Barrier	20	English is business norm; Arabic advantageous for government but not required privately [Fact]
Local Entity Requirement	25	100% foreign ownership permitted mainland since 2020; free zones widely used [Fact]
Regulatory Compliance Burden	50	PDPL, DIFC data law, ICV certification for government, NESAs for CNI [Fact]
Entry Cost / Partner Qualification Difficulty	45	Cloud certs 2–6 months; ISO 27001 6–12 months;

Sub-Metric	Score (0-100)	Evidence Note
		real barrier is 3-5 reference clients [Inference]
DIMENSION SCORE (Average)	35.0	<i>Average of sub-metric scores above</i>

CFS — Channel Fit Score | Weight ×0.20 | Score: 75.8

Sub-Metric	Score (0-100)	Evidence Note
Ecosystem Maturity	75	Moderate-High; hyperscaler ecosystems well-established; Microsoft to contribute USD 74.4B to UAE economy [Fact]
Partner Availability	75	GBM, Raqmiyat, Alpha Data, Emitac, Cloud4C, 1xDS all named [Fact]
Distribution Model Alignment	78	48% of UAE IT decision-makers use channel partners primarily for cloud [Fact]; multi-layer model suits partner-first strategy [Inference]
Named Partner Access	75	bps (VAD since 2005), Mindware active distributors; mid-tier segment growing rapidly [Fact]
DIMENSION SCORE (Average)	75.8	<i>Average of sub-metric scores above</i>

TDAS — Technical Delivery Alignment Score | Weight ×0.15 | Score: 78.0

Sub-Metric	Score (0-100)	Evidence Note
Certification Alignment	72	ISO 27001 essential; cloud vendor certs table stakes; ICV for government; CREST for cybersecurity [Fact]
Support Complexity Fit	70	24/7 SLAs expected; 3.5-hour timezone offset India-UAE is favourable [Inference]
Technical Capability Match	80	ERP modernisation, cloud engineering all squarely in [Redacted] cope [Inference]
Delivery Model Fit	90	Existing Dubai office provides on-site governance; India delivery for execution; 60% cost arbitrage [Fact/Inference]
DIMENSION SCORE (Average)	78.0	<i>Average of sub-metric scores above</i>

OCF — Operating Cost Fit | Weight ×0.15 | Score: 84.3

Sub-Metric	Score (0–100)	Evidence Note
Gross Margin Potential	87	Staff aug (India-delivered) 40–55%; professional services 15–30%; ERP 25–30% [Fact/Inference]
Average Deal Size / ACV	80	Blended mid-market USD 150K–500K ACV; ERP first-year USD 200K–600K [Inference]
Revenue Recurrence	80	MSA 3–5 year minimum terms increasingly common; staff aug inherently recurring [Fact]
Cost Arbitrage Opportunity	90	AED 250K–300K local hire vs AED 90K–120K India-delivered = 60% savings [Fact]
DIMENSION SCORE (Average)	84.3	<i>Average of sub-metric scores above</i>

SALI — Sales Acceleration & Leverage Index | Weight ×0.10 | Score: 73.8

Sub-Metric	Score (0–100)	Evidence Note
Sales Cycle Length	85	3–6 months mid-market; corporate tax urgency compresses cycles 20–30% [Inference]
Decision Complexity	58	5–7 decision-makers; English business norm; relationship-driven [Fact/Inference]
Existing Relationships / Beachhead	85	Existing Dubai office provides local presence, credibility, and pipeline [Fact]
GTM Leverage	80	Dubai office enables adjacency into KSA; direct engagement capability noted in evidence brief [Fact/Inference]
DIMENSION SCORE (Average)	73.8	<i>Average of sub-metric scores above</i>

Opportunity Drivers & Risks

Top 2 Opportunity Drivers	Top 2 Risks
<ul style="list-style-type: none"> Strong local presence in Dubai Proven cost arbitrage opportunities 	<ul style="list-style-type: none"> High decision complexity Competition from established players

Market Deep Dive · Priority #2

United Kingdom

GMFS Composite Result

GMFS Composite Score	Band	Priority Rank	Recommendation
77.2	Strong Fit	#2 of 7	Execute

Dimension Score Overview

EPI (×0.25)	BRS	CFS (×0.20)	TDAS (×0.15)	OCF (×0.15)	SALI (×0.10)
82.0	37.5	85.0	76.3	83.3	63.8

EPI — External Pull Index | Weight ×0.25 | Score: 82.0

Sub-Metric	Score (0–100)	Evidence Note
Market Size & Growth Rate	85	USD 105–112.5B; 6.8–7.1% CAGR; SME outpaces at 9.8% CAGR [Fact]
Regulatory-Driven Demand	75	Cyber Resilience Bill (900–1,100 MSPs), UK GDPR, FCA third-party obligations [Fact]
Talent Shortage / Offshore Pull	88	~870,000 tech vacancies; 76% employers cite acute skill shortages; NI hike Apr 2025 inflates employer costs [Fact]
Digital Transformation Urgency	80	Cloud adoption 42% → 53%; USD 2.11B AI R&D; Making Tax Digital driving Dynamics BC migration [Fact]
DIMENSION SCORE (Average)	82.0	<i>Average of sub-metric scores above</i>

BRS — Barrier to Reach Score | Weight ×0.15 (inverted: 100–BRS) | Score: 37.5

Sub-Metric	Score (0–100)	Evidence Note
Language & Cultural Barrier	10	English — no barrier whatsoever [Fact]
Local Entity Requirement	30	No legal requirement for private sector; G-Cloud 15 advantageous; strongly recommended for gov [Inference]
Regulatory Compliance Burden	55	Cyber Essentials (mandatory gov); ISO 27001; SOC 2; IR35 compliance structures needed [Fact]
Entry Cost / Partner Qualification Difficulty	55	Cyber Essentials fast (weeks); ISO 27001 takes 3–6 months / £10K–30K; vendor certs 6–12 months [Inference]
DIMENSION SCORE (Average)	37.5	<i>Average of sub-metric scores above</i>

CFS — Channel Fit Score | Weight ×0.20 | Score: 85.0

Sub-Metric	Score (0–100)	Evidence Note
Ecosystem Maturity	90	11,000+ active MSPs; £52.6B combined revenue; Oxygen 250 ranking infrastructure [Fact]
Partner Availability	85	Softcat, Computacenter, CDW UK, Columbus, Version 1, Dynamics Square — extensive named roster [Fact]
Distribution Model Alignment	80	Partner-led SME growth; G-Cloud 14/15 SME-friendly (37.4% of £14.72B from SMEs) [Fact]
Named Partner Access	85	Open ecosystem; Oxygen 250 provides transparent partner ranking and discovery [Fact]
DIMENSION SCORE (Average)	85.0	<i>Average of sub-metric scores above</i>

TDAS — Technical Delivery Alignment Score | Weight ×0.15 | Score: 76.3

Sub-Metric	Score (0–100)	Evidence Note
Certification Alignment	75	Cyber Essentials achievable weeks/£300–5K; ISO 27001 6 months; ISO 42001 (AI) emerging [Fact]
Support Complexity Fit	65	24/7 SLAs for critical systems; AI/GenAI expertise increasingly expected; IST timezone requires planning [Fact/Inference]
Technical Capability Match	80	Dynamics BC migration (Making Tax Digital), SAP S/4HANA cloud (67% large enterprises) align with [REDACTED] services [Fact/Inference]
Delivery Model Fit	85	India delivery well-accepted; 40–60% cost savings documented; offshore growing in mid-market [Fact/Inference]
DIMENSION SCORE (Average)	76.3	<i>Average of sub-metric scores above</i>

OCF — Operating Cost Fit | Weight ×0.15 | Score: 83.3

Sub-Metric	Score (0–100)	Evidence Note
Gross Margin Potential	85	India-delivery staff avg 40–50%; managed services 30–45%; consulting 25–40% [Fact/Inference]

Sub-Metric	Score (0-100)	Evidence Note
Average Deal Size / ACV	80	Staff aug £100K–500K; cloud migration £50K–300K; blended mid-market £150K–500K ACV [Inference]
Revenue Recurrence	80	Staff aug inherently recurring; managed services growing; Oxygen 250 partners doubling down on recurring IP [Fact]
Cost Arbitrage Opportunity	88	UK contractor rates £500–800/day vs India delivery cost; NI hike inflating onshore costs further [Fact/Inference]
DIMENSION SCORE (Average)	83.3	<i>Average of sub-metric scores above</i>

SALI — Sales Acceleration & Leverage Index | Weight ×0.10 | Score: 63.8

Sub-Metric	Score (0-100)	Evidence Note
Sales Cycle Length	70	Staff aug 2–6 weeks; G-Cloud call-offs 4–8 weeks once on framework; ERP 3–6 months [Inference]
Decision Complexity	60	Mid-market faster than enterprise; CTO/CIO, CFO, procurement, compliance/risk — manageable [Inference]
Existing Relationships / Beachhead	65	No existing UK office but shared language and culture dramatically reduce trust-building [Inference]
GTM Leverage	60	G-Cloud framework, Dynamics partner ecosystem, and open MSP market provide structured entry paths [Inference]
DIMENSION SCORE (Average)	63.8	<i>Average of sub-metric scores above</i>

Opportunity Drivers & Risks

Top 2 Opportunity Drivers	Top 2 Risks
<ul style="list-style-type: none"> Staff augmentation Cloud migration Managed services 	<ul style="list-style-type: none"> UK contractor rates NI hike Onshore costs

Market Deep Dive · Priority #3

Netherlands

GMFS Composite Result

GMFS Composite Score	Band	Priority Rank	Recommendation
69.4	Conditional Fit	#3 of 7	Adjust then Enter

Dimension Score Overview

EPI (×0.25)	BRS	CFS (×0.20)	TDAS (×0.15)	OCF (×0.15)	SALI (×0.10)
75.8	53.3	79.5	73.3	77.8	48.3

EPI — External Pull Index | Weight ×0.25 | Score: 75.8

Sub-Metric	Score (0–100)	Evidence Note
Market Size & Growth Rate	75	USD 10.17B (Mordor); cloud USD 7.52B at 13.36% CAGR; cyber USD 2.35B at 8.6% [Fact]
Regulatory-Driven Demand	72	Dutch NIS2 (Cybersecurity Act Q3 2025, ~8,000 orgs); DORA Jan 2025; Rijkscloud EUR 70M [Fact]
Talent Shortage / Offshore Pull	78	31,435 IT vacancies in 2024; 21% firms cannot fill key roles; 20,000 cybersecurity shortfall projected [Fact]
Digital Transformation Urgency	78	USD 2.5B tech investments in 2024 (+39% YoY); Amsterdam leads Europe in AI-native funding [Fact]
DIMENSION SCORE (Average)	75.8	<i>Average of sub-metric scores above</i>

BRS — Barrier to Reach Score | Weight ×0.15 (inverted: 100–BRS) | Score: 53.3

Sub-Metric	Score (0–100)	Evidence Note
Language & Cultural Barrier	50	Dutch preferred for government docs and end-user support; English acceptable for technical roles [Fact]
Local Entity Requirement	38	Non-EU companies can participate via WTO GPA; EU presence preferred, not mandatory for private sector [Fact/Inference]
Regulatory Compliance Burden	65	NIS2, DORA, Rijkscloud (data sovereignty), BIO for government, NEN 7510 for healthcare [Fact]
Entry Cost / Partner Qualification Difficulty	60	Multiple certs needed; local references required; Dutch language needed for government documentation [Inference]
DIMENSION SCORE (Average)	53.3	<i>Average of sub-metric scores above</i>

The Netherlands presents a moderate barrier profile — lower than Germany or France but higher than the UK or UAE. Dutch is required for government documentation and TenderNed public procurement, but English is fully accepted for technical

CFS — Channel Fit Score | Weight ×0.20 | Score: 79.5

Sub-Metric	Score (0–100)	Evidence Note
Ecosystem Maturity	78	Mature: 25,000 tech enterprises; 265,000 professionals; PE drove 60% of MSP acquisitions in 2024 [Fact]
Partner Availability	78	Ordina/Sopra Steria, Centric, Info Support, Xebia, Valid, Pipol — diverse named roster [Fact]
Distribution Model Alignment	80	Direct + partner hybrid; offshore growing 16.3% CAGR; India #2 destination; hybrid mgd services "reference architecture" [Fact]
Named Partner Access	82	Existing India openness; Dynamics Square (NL), To-Increase (Dutch ISV), GLBNXT active [Fact]
DIMENSION SCORE (Average)	79.5	<i>Average of sub-metric scores above</i>

TDAS — Technical Delivery Alignment Score | Weight ×0.15 | Score: 73.3

Sub-Metric	Score (0–100)	Evidence Note
Certification Alignment	68	ISO 27001 essential; ISO 9001 common; NEN 7510 (healthcare); BIO (government); ISAE 3402 for MSPs [Fact/Inference]
Support Complexity Fit	65	CET business hours minimum; 24/7 for managed services; Dutch preferred for end-user support [Inference]
Technical Capability Match	78	Cloud/data [REDACTED] P, managed security aligning t [REDACTED] apabilities [Fact/Infe]
Delivery Model Fit	82	Remote/offshore fastest-growing at 16.3% CAGR; India explicitly #2 destination [Fact]
DIMENSION SCORE (Average)	73.3	<i>Average of sub-metric scores above</i>

OCF — Operating Cost Fit | Weight ×0.15 | Score: 77.8

Sub-Metric	Score (0-100)	Evidence Note
Gross Margin Potential	82	India-delivery blended model 45-60% (Dutch governance €130-150/hr + offshore delivery €25-45/hr) [Inference]
Average Deal Size / ACV	75	Staff avg €50K-200K/resource; cloud €100K-500K; managed services €100K-500K ACV [Fact/Inference]
Revenue Recurrence	72	Mid-term contracts 1-3 years dominate; managed security at 16.99% CAGR; born-in-cloud MSPs growing [Fact]
Cost Arbitrage Opportunity	82	Dutch onshore rates €130-180/hr vs India €25-45/hr; strong arbitrage window [Fact/Inference]
DIMENSION SCORE (Average)	77.8	<i>Average of sub-metric scores above</i>

SALI — Sales Acceleration & Leverage Index | Weight: 0.10 | Score: 48.3

Sub-Metric	Score (0-100)	Evidence Note
Sales Cycle Length	50	4-9 months average; staff aug 2-6 weeks; government 3-9 months tender + 12-24 months relationship-building [Inference]
Decision Complexity	45	Poldermodel — 5-8 stakeholders; CIO, CFO, COO, CISO, Procurement, DPO; consensus required [Fact/Inference]
Existing Relationships / Beachhead	38	No existing NL office or named relationships documented [Uncertain + Benchmark: conservative cold-start assumption]
GTM Leverage	60	India #2 offshore destination creates buyer familiarity; offshore growing fastest (16.3% CAGR) [Fact]
DIMENSION SCORE (Average)	48.3	<i>Average of sub-metric scores above</i>

Opportunity Drivers & Risks

Top 2 Opportunity Drivers	Top 2 Risks
<ul style="list-style-type: none"> Strong cost arbitrage window between Dutch onshore and Indian offshore rates. High revenue recurrence driven by mid-term contracts and managed security services. 	<ul style="list-style-type: none"> Complex decision-making process (Poldermodel) involving multiple stakeholders (CIO, CFO, COO, CISO, Procurement, DPO). Lack of existing relationships or beachhead in the Netherlands market.

SAMPLE

Belgium

GMFS Composite Result

GMFS Composite Score	Band	Priority Rank	Recommendation
65.2	Conditional Fit	#4 of 7	Adjust then Enter

Dimension Score Overview

EPI (×0.25)	BRS	CFS (×0.20)	TDAS (×0.15)	OCF (×0.15)	SALI (×0.10)
73.3	56.8	70.5	68.8	73.3	49.3

EPI — External Pull Index | Weight ×0.25 | Score: 73.3

Sub-Metric	Score (0–100)	Evidence Note
Market Size & Growth Rate	68	USD 6.6B IT services; 4.7% CAGR; cloud 10–12% CAGR; public cloud USD 6.06B (2025) [Fact]
Regulatory-Driven Demand	78	NIS2: 2,410 entities in scope with April 2026 self-assessment; DORA from Jan 2025; AI Act Aug 2026 [Fact]
Talent Shortage / Offshore Pull	75	21,000 tech worker shortfall by 2026; cybersecurity salaries +13% YoY 2024 [Fact]
Digital Transformation Urgency	72	70%+ Benelux enterprises cloud ERP by 2025; SAP S/4HANA 2027; Google €1B data centre; Microsoft 3 new Brussels DCs [Fact]
DIMENSION SCORE (Average)	73.3	<i>Average of sub-metric scores above</i>

Belgium presents a strong demand environment for [REDACTED] services, driven primarily by regulatory compliance triggers rather than raw market scale. [Fact] The NIS2 directive mandates 10 essential and important entities into scope with a mandatory self-assessment deadline of April 2026, creating a discrete, time-bound compliance procurement wave that advisory and implementation partners can service. [Fact] The SAP S/4HANA ECC end-of-maintenance 2027 deadline compounds urgency: mid-market firms cannot afford Big 5 consultancy rates and lack the local talent (21,000 worker shortfall by 2026) to manage migrations internally. [Fact/Inference] Hyperscaler investment — Google's €1 billion Farciennes data centre and Microsoft's three Brussels data centres — signals sustained long-term market commitment that underpins enterprise cloud adoption. [Fact]

BRS — Barrier to Reach Score | Weight ×0.15 (inverted: 100–BRS) | Score: 56.8

Sub-Metric	Score (0–100)	Evidence Note
Language & Cultural Barrier	60	Multilingual: Dutch/French/German/English; support expected in Dutch and French minimum; influences channel dynamics [Fact]
Local Entity Requirement	40	Open to non-Belgian entities; no mandatory requirement; local presence provides practical advantages [Fact]
Regulatory Compliance Burden	65	NIS2/DORA/GDPR data-residency for essential entities; employer social security >25–30% for augmentation [Fact]
Entry Cost / Partner Qualification Difficulty	62	Medium-High: multilingual support, NIS2/DORA/GDPR compliance, vendor certs, Belgian employment law [Inference]

Sub-Metric	Score (0–100)	Evidence Note
DIMENSION SCORE (Average)	56.8	<i>Average of sub-metric scores above</i>

Belgium's primary barrier is its multilingual character: Dutch and French are both expected for L1/L2 client support, and the dynamic differs by region (Flanders vs Wallonia vs Brussels), requiring either multilingual staff or carefully segmented initial market focus. [Fact] Belgian employment law imposes employer social security contributions exceeding 25–30% of gross salary for any locally-employed augmentation staff — a meaningful cost addition to non-delivery overhead. [Fact] Regulatory compliance obligations (NIS2, DORA, GDPR) create an implementation cost but simultaneously create the commercial opportunity; the same frameworks that raise barriers also generate the advisory demand [REDACTED] an address. [Fact/Inference] Public procurement — accounting for 23.5% of Belgium's ICT market — [REDACTED] non-Belgian entities but practically requires a local entity for sustained access. [Fact]

CFS — Channel Fit Score | Weight ×0.20 | Score: 70.5

Sub-Metric	Score (0–100)	Evidence Note
Ecosystem Maturity	72	Moderate-Dense; top 40 SIs account for ~one-third of national ICT turnover; SI-led and direct sales [Fact]
Partner Availability	72	Cronos, Cegeka, Inetum-Realdolmen, delaware, Econocom — strong named roster [Fact]
Distribution Model Alignment	70	SI-led with certified implementation partner model for ERP; partner-first strategy compatible [Fact/Inference]
Named Partner Access	68	Ingram Micro Cloud, Pax8, Also Group as distributors; SAP/Microsoft partner certifications gatekeep ERP channel [Fact]
DIMENSION SCORE (Average)	70.5	<i>Average of sub-metric scores above</i>

Belgium's channel ecosystem is predominantly SI-led, with top 40 SIs accounting for approximately one-third of national ICT turnover — a concentration that requires [REDACTED] to engage at the SI level rather than attempting direct end-market access for most segments. [Fact] Named partner demand as they scale [REDACTED] cegeka, Inetum-Realdolmen) are all established and growing through acquisition. Cegeka acquired CTG for €150M in December 2024), creating subcontracting and delivery partner demand as they scale [REDACTED] The ERP channel specifically is certification-gated (SAP PartnerEdge, Microsoft Partner Network, Cleanin [REDACTED] must either secure its own certifications or operate as a delivery sub-contractor on already certified SI. [Fact] [REDACTED] access via Ingram Micro Cloud, Pax8, and Also Group provides a structured route to the reseller tier without needing to build direct partner relationships from scratch. [Fact]

TDAS — Technical Delivery Alignment Score | Weight ×0.15 | Score: 68.8

Sub-Metric	Score (0–100)	Evidence Note
Certification Alignment	70	ISO 27001 mandatory for NIS2/public sector clients; SAP/Microsoft/AWS certs essential; DORA documentation for financial [Fact]
Support Complexity Fit	58	L1/L2 in Dutch and French minimum; L3 retained or handled by SIs; multilingual complexity manageable but real [Inference]
Technical Capability Match	75	Big Data/ML, NIS2 advisory/implementation, SAP S/4HANA migration, cloud ERP — all in scope [Fact/Inference]
Delivery Model Fit	72	India delivery accepted, especially for mid-market; talent shortage creates receptivity; hybrid model viable [Inference]
DIMENSION SCORE (Average)	68.8	<i>Average of sub-metric scores above</i>

Belgium's technical support requirements are challenging but addressable through a structured multilingual delivery model. L1/L2 support in Dutch and French minimum creates a non-trivial staffing requirement for client-facing roles, though L3 technical delivery remains fully India-deliverable. [Inference] ISO 27001 certification is increasingly mandatory for NIS2-scoped and public sector clients — achievable in 6–12 months and directly unlocking a substantial proportion of the 2,410 in-scope entity opportunity. [Fact/Inference] The SAP S/4HANA migration wave driven by 2027 end-of-maintenance creates immediate

demand for implementation capacity that Belgium's local talent base (21,000 shortfall) cannot satisfy — making India-delivery a necessity rather than a preference for many SI partners. [Fact/Inference] Big Data/ML engineering at affordable offshore rates is explicitly identified as under-represented in the Belgian market, a direct capability match. [Inference]

OCF — Operating Cost Fit | Weight ×0.15 | Score: 73.3

Sub-Metric	Score (0–100)	Evidence Note
Gross Margin Potential	75	India delivery can push augmentation margins to 40%+; managed services 50–60%; offset by Europe's highest labour costs [Fact/Inference]
Average Deal Size / ACV	72	Blended mid-market €150K–500K ACV; ERP implementation €200K–1M+; staff aug €50K–200K [Inference]
Revenue Recurrence	68	Project-driven transitioning to recurring; hybrid ERP 40% of new Benelux deployments by 2027 [Fact]
Cost Arbitrage Opportunity	78	Talent shortage and highest employer costs in EU drive offshore acceptance; India delivery structurally advantaged [Fact/Inference]
DIMENSION SCORE (Average)	73.3	<i>Average of sub-metric scores above</i>

Belgium's margin profile is moderate with meaningful upside — India-delivered augmentation can achieve 40%+ gross margins given Belgium's acute talent shortage and the EU's highest employer cost environment — firms are structurally motivated to accept offshore delivery to avoid the 25–30%+ social security burden of local hires. [Fact/Inference] Managed services margins of 50–60% are achievable at scale and are the most attractive margin tier, though they require a sustained client relationship and service delivery track record to access. [Fact/Inference] Deal sizes are meaningful for a mid-market focus: blended €150K–500K ACV with ERP implementation, reaching €200K–1M+. [Inference] The market is actively transitioning from project-based to recurring revenue, with hybrid cloud ERP expected to account for 40% of new Benelux deployments by 2027 — creating a recurring revenue opportunity of successful ERP implementations. [Fact]

SALI — Sales Acceleration & Leverage Index | Weight ×0.10 | Score: 49.3

Sub-Metric	Score (0–100)	Evidence Note
Sales Cycle Length	55	3–9 months mid-market; staff aug 2–6 weeks; ERP 6–12 months; public sector adds 2–6 months [Inference]
Decision Complexity	50	4–7 stakeholders; consensus-driven; may involve works council consultation; Considered-to-Enterprise [Inference]
Existing Relationships / Reachhead	40	No existing Belgian office or named relationships documented [Uncertain + Benchmark]
GTM Leverage	52	NIS2 wave creates urgency; SI subcontracting provides faster entry than direct; April 2026 self-assessment deadline [Fact/Inference]
DIMENSION SCORE (Average)	49.3	<i>Average of sub-metric scores above</i>

Belgium's sales acceleration profile is moderate, constrained by consensus-driven decision culture (4–7 stakeholders) and the practical reality of entering without an existing commercial presence or Belgian references. [Inference] The NIS2 April 2026 self-assessment deadline provides a time-bound urgency trigger that may compress decision timelines for regulated entities — this is the strongest near-term acceleration lever available. [Fact] A PoC or pilot is typically required for cloud, data, and AI projects (4–8 weeks), adding to cycle length but also providing a structured low-risk entry point for building initial references. [Inference] Belgian customers value reliability and proven solutions, and the preference for demonstrated track records means the first 1–2 Belgian client references will significantly compress subsequent cycles. [Inference]

Opportunity Drivers & Risks

Top 2 Opportunity Drivers	Top 2 Risks
<ol style="list-style-type: none"> 21,000 tech worker shortfall by 2026 combined with Europe's highest employer costs creates structural demand for India-delivery augmentation 	<ol style="list-style-type: none"> Multilingual L1/L2 support requirement (Dutch and French minimum) creates non-trivial client-facing staffing overhead

Top 2 Opportunity Drivers	Top 2 Risks
<p>2. NIS2 April 2026 self-assessment deadline for 2,410 in-scope entities creates a near-term, time-bound compliance advisory wave</p>	<p>2. Belgium's incumbent SI landscape (Cronos, Cegeka, Inetum-Realdolmen) is deeply entrenched with long-standing client relationships in mid-market</p>

SAMPLE

Market Deep Dive · Priority #5

Germany

GMFS Composite Result

GMFS Composite Score	Band	Priority Rank	Recommendation
63.6	Conditional Fit	#5 of 7	Adjust then Enter

Dimension Score Overview

EPI (×0.25)	BRS	CFS (×0.20)	TDAS (×0.15)	OCF (×0.15)	SALI (×0.10)
85.0	77.0	71.8	55.0	83.8	36.8

EPI — External Pull Index | Weight ×0.25 | Score: 85.0

Sub-Metric	Score (0–100)	Evidence Note
Market Size & Growth Rate	85	EUR 2.6B IT services; IT outsourcing USD 38.5B; cloud USD 34–41B; 5.2–8.6% CAGR [Fact]
Regulatory-Driven Demand	82	NIS2 transposed Dec 6 2025 — 29,500–30,000 entities in scope; DORA Jan 2025; management personal liability [Fact]
Talent Shortage / Offshore Pull	88	149,000 unfilled IT roles; 7.7-month average vacancy; projected to quadruple by 2040 [Fact]
Digital Transformation Urgency	85	SAP ECC end-of-maintenance 2027; EUR 3.2B "Digital Now" for Mittelstand ERP; EUR 10B/yr smart manufacturing [Fact]
DIMENSION SCORE (Average)	85.0	<i>Average of sub-metric scores above</i>

BRS — Barrier to Reach Score | Weight ×0.15 (inverted: 100–BRS) | Score: 77.0

Sub-Metric	Score (0–100)	Evidence Note
Language & Cultural Barrier	88	German language mandatory for client-facing, documentation, L1/L2 support; Mittelstand culturally prefers German partners [Fact]
Local Entity Requirement	60	No legal requirement but near-necessity for public sector; BSI certifications require German-language engagement [Fact/Inference]
Regulatory Compliance Burden	80	BSI C5 (mandatory healthcare/financial cloud by 2027); ISO 27001; ISO 20000; TISAX (automotive); Works Council data laws [Fact]
Entry Cost / Partner Qualification Difficulty	80	No German entity, no German refs, no BSI C5, no language = significant combined barrier; public sector inaccessible initially [Inference]

Sub-Metric	Score (0-100)	Evidence Note
DIMENSION SCORE (Average)	77.0	<i>Average of sub-metric scores above</i>

CFS — Channel Fit Score | Weight ×0.20 | Score: 71.8

Sub-Metric	Score (0-100)	Evidence Note
Ecosystem Maturity	82	Very mature; 384+ verified SAP partners; Systemhäuser dominant; PE acquiring mid-tier (KKR/Datagroup €500M) [Fact]
Partner Availability	80	All for One Group, NTT DATA/Intelligence, Bechtle, Mancom, Adesso — extensive named roster [Fact]
Distribution Model Alignment	65	Systemhäuser dominant; SAP explicitly routes mid-market through partners — compatible but requires German front-end [Fact/Inference]
Named Partner Access	70	Access requires German language capability; best entry via subcontracting to Systemhäuser for backend delivery [Inference]
DIMENSION SCORE (Average)	71.8	<i>Average of sub-metric scores above</i>

TDAS — Technical Delivery Alignment Score | Weight ×0.15 | Score: 55.0

Sub-Metric	Score (0-100)	Evidence Note
Certification Alignment	55	ISO 27001 table stakes; BSI C5 mandatory healthcare/financial/public sector by 2027 (ISAE 3000 audit); TISAX automotive [Fact]
Support Complexity Fit	45	German-language L1/L2 mandatory; on-site for critical kickoffs; local data centres required for regulated clients; SLA with ISO 20000 [Fact/Inference]
Technical Capability Match	70	Backend data engineering, testing, RPA, analytics well-aligned; customer-facing SAP/ERP delivery requires German language [Fact/Inference]
Delivery Model Fit	50	Nearshore (Poland, Romania, Czech) strongly preferred over offshore for Mittelstand; cultural proximity valued [Fact]
DIMENSION SCORE (Average)	55.0	<i>Average of sub-metric scores above</i>

OCF — Operating Cost Fit | Weight ×0.15 | Score: 83.8

Sub-Metric	Score (0–100)	Evidence Note
Gross Margin Potential	85	India delivery can achieve 50–65% (Indian dev \$15–25/hr billed at €50–99/hr); one of highest in EMEA [Fact/Inference]
Average Deal Size / ACV	85	Datagroup benchmark ~€750K/yr new customer; staff aug ACV €300K–750K; SAP migration €500K–3M+ [Fact]
Revenue Recurrence	80	All for One 53% recurring; Datagroup 66% recurring; SAP cloud subscription accelerating ARR [Fact]
Cost Arbitrage Opportunity	85	Indian developer \$15–25/hr billed at €50–99/hr = extraordinary margin; Germany among highest arbitrage [Fact/Inference]
DIMENSION SCORE (Average)	83.8	<i>Average of sub-metric scores above</i>

SALI — Sales Acceleration & Leverage Index | Weight ×0.10 | Score: 36.8

Sub-Metric	Score (0–100)	Evidence Note
Sales Cycle Length	52	3–9 months; Mittelstand deliberately cautious (“Gründlichkeit”); SAP 2027 urgency may help; full outsourcing 6–12+ months [Inference]
Decision Complexity	40	Geschäftsführer final authority; Betriebsrat (Works Council) legally must be consulted; 3–5 stakeholders for Mittelstand [Fact]
Existing Relationships / Beachhead	25	No German office, no German language capability documented, no German references [Uncertain + Benchmark: maximum conservative penalty]
GTM Leverage	30	No existing leverage; partner-led entry requires sustained relationship-building with German SIs first [Inference]
DIMENSION SCORE (Average)	36.8	<i>Average of sub-metric scores above</i>

Opportunity Drivers & Risks

Top 2 Opportunity Drivers	Top 2 Risks
<p>[Blurred text]</p>	<p>[Blurred text]</p>

SAMPLE

Market Deep Dive · Priority #6

Saudi Arabia

GMFS Composite Result

GMFS Composite Score	Band	Priority Rank	Recommendation
63.2	Conditional Fit	#6 of 7	Adjust then Enter

Dimension Score Overview

EPI (×0.25)	BRS	CFS (×0.20)	TDAS (×0.15)	OCF (×0.15)	SALI (×0.10)
88.3	83.8	65.0	59.3	81.3	45.8

EPI — External Pull Index | Weight ×0.25 | Score: 88.3

Sub-Metric	Score (0–100)	Evidence Note
Market Size & Growth Rate	90	USD 3.09B (2025) → USD 45.77B by 2030; SME IT 12.66% CAGR; cloud 12.66% CAGR [Fact]
Regulatory-Driven Demand	88	PDPL fully enforced Sep 2024; NCA 114 controls; FATOORA triggered USD 800M IT demand from 400K+ SMEs [Fact]
Talent Shortage / Offshore Pull	85	15,000+ unfilled roles; salary premiums 45–60% above regional norms; only 5,000 certified cloud professionals [Fact]
Digital Transformation Urgency	90	Vision 2030; SAR 15B MCT 2024 (+340%); NEOM USD 5B data centre; LEAP 2025 USD 14.9B AI commitments [Fact]
DIMENSION SCORE (Average)	88.3	<i>Average of sub-metric scores above</i>

BRS — Barrier to Reach Score | Weight ×0.15 (inverted: 100–BRS) | Score: 83.8

Sub-Metric	Score (0–100)	Evidence Note
Language & Cultural Barrier	72	Arabic often required for government; English accepted for private sector mid-market; relationship-driven culture [Fact]
Local Entity Requirement	85	MISA licence (regional HQ) required for public tenders from Jan 2024; Saudisation 30–40% quota [Fact]
Regulatory Compliance Burden	90	PDPL, NCA 114 controls, SAMA Framework (BFSI), CITC data residency, IKTVA, FATOORA cert, GTPL [Fact]
Entry Cost / Partner Qualification Difficulty	88	6–12 month minimum qualification; MISA entity setup; Saudisation salary premiums; MDS SI holds 1,400+ certs as benchmark [Fact/Inference]

Sub-Metric	Score (0-100)	Evidence Note
DIMENSION SCORE (Average)	83.8	<i>Average of sub-metric scores above</i>

CFS — Channel Fit Score | Weight ×0.20 | Score: 65.0

Sub-Metric	Score (0-100)	Evidence Note
Ecosystem Maturity	65	Moderately mature, rapidly evolving; organised players at advantage; 78% enterprise cloud adoption in 2024 [Fact]
Partner Availability	61	WaveIT (Oracle/SAP India-KSA bridge), BaasKaar (SAP), Trax Group (Dynamics 365), DataSack Solutions [Fact]
Distribution Model Alignment	62	SI + OEM dominant; outcome-based contracting in 80% of large deals; Etimad government platform centralised [Fact]
Named Partner Access	61	India-KSA bridge partners (Wave and are the natural entry point for [Fact/Inference]
DIMENSION SCORE (Average)	65.0	<i>Average of sub-metric scores above</i>

TDAS — Technical Delivery Alignment Score | Weight ×0.15 | Score: 59.3

Sub-Metric	Score (0-100)	Evidence Note
Certification Alignment	48	NCA Essential Controls; SAMA Framework; CITC Cloud Computing compliance; ZATCA FATOORA cert; ISO 27001; all concurrent [Fact]
Support Complexity Fit	42	Arabic capability strongly preferred; 24/7 for managed security; 56% tech leaders cite skills shortage as top AI barrier [Fact]
Technical Capability Match	75	Mid-market ERP (Dynamics 365 dominates retail/distribution), cloud migration, data engineering well aligned [Fact]
Delivery Model Fit	72	Dubai office provides nearshore advantage; offshore 19.2% CAGR; India-KSA delivery model validated by Wipro Arabia [Fact/Inference]
DIMENSION SCORE (Average)	59.3	<i>Average of sub-metric scores above</i>

OCF — Operating Cost Fit | Weight ×0.15 | Score: 81.3

Sub-Metric	Score (0–100)	Evidence Note
Gross Margin Potential	80	India-delivered staff avg 35–50%; managed security +34% contract value in 2024; consulting 25–40% [Fact/Inference]
Average Deal Size / ACV	85	avg USD 2.3M (3x regional norm); id-market target USD 200K–2M SD 78K [Fact]
Revenue Recurrence	75	Managed services USD 5.12B at 8.2% CAGR; outcome-based multi-year contracts; FATOORA cloud/SaaS transitions [Fact]
Cost Arbitrage Opportunity	85	40–60% cost savings India vs local; salary premiums 45–60% above regional — makes offshore more valuable [Fact]
DIMENSION SCORE (Average)	81.3	<i>Average of sub-metric scores above</i>

SALI — Sales Acceleration & Leverage Index | Weight ×0.10 | Score: 45.8

Sub-Metric	Score (0–100)	Evidence Note
Sales Cycle Length	38	6–18 months enterprise; 3–9 months mid-market with FATOORA urgency; government 9–18+ months via Etimad [Fact/Inference]
Decision Complexity	30	Multi-committee; Government Relations Officer mandatory Saudi national; PDPL/NCA/Saudisation overlays; outcome-based contracting shifts risk to vendor [Fact/Inference]
Existing Relationships / Beachhead	60	Dubai office provides adjacency advantage; GCC cultural familiarity; potential UAE client referrals [Fact/Inference]
GTM Leverage	55	FATOORA urgency (400K+ SMEs); Vision 2030 pipeline sustained multi-year; India-KSA bridge partners as entry accelerators [Fact/Inference]
DIMENSION SCORE (Average)	45.8	<i>Average of sub-metric scores above</i>

Opportunity Drivers & Risks

Top 2 Opportunity Drivers	Top 2 Risks
<p>[Blurred text in green box]</p>	<p>[Blurred text in red box]</p>

SAMPLE

France

GMFS Composite Result

GMFS Composite Score	Band	Priority Rank	Recommendation
57.6	Conditional Fit	#7 of 7	Adjust then Enter

Dimension Score Overview

EPI (×0.25)	BRS	CFS (×0.20)	TDAS (×0.15)	OCF (×0.15)	SALI (×0.10)
67.5	74.3	69.8	55.3	70.5	40.0

EPI — External Pull Index | Weight ×0.25 | Score: 67.5

Sub-Metric	Score (0–100)	Evidence Note
Market Size & Growth Rate	68	€34.5B ESN market; cloud +27% to €20.1B; BUT ESN sector growth only +0.7% in 2024 (slowdown from +6.3%) [Fact]
Regulatory-Driven Demand	75	NIS2 not yet transposed (infringement proceedings); DORA applicable Jan 2025; France 2030 €4B AI [Fact]
Talent Shortage / Offshore Pull	65	673,000 digital employees overall but specific scarcity in cloud/AI/data; union opposition to offshoring documented [Fact]
Digital Transformation Urgency	72	France 2030 €54B innovation; AI specialists to double by 2030; cloud +27%; Big Data €3.6B +15.7% [Fact]
DIMENSION SCORE (Average)	67.5	<i>Average of sub-metric scores above</i>

BRS — Barrier to Reach Score | Weight ×0.15 (inverted: 100–BRS) | Score: 74.3

Sub-Metric	Score (0–100)	Evidence Note
Language & Cultural Barrier	82	French essential for all commercial engagement, L1–L3 support; trust-building requires French-speaking presence; 2–4 month additional cycle for unknown vendors [Fact/Inference]
Local Entity Requirement	65	French-registered entity preferred; public contracts often require it; SecNumCloud blocks non-EU providers from sensitive sectors [Fact]
Regulatory Compliance Burden	78	SecNumCloud (non-EU effectively blocked from sensitive sectors); DORA; HDS (healthcare); CNIL/GDPR; ESG/RSE criteria exclusionary in RFPs [Fact]

Sub-Metric	Score (0-100)	Evidence Note
Entry Cost / Partner Qualification Difficulty	72	ISO 27001 achievable; French entity preferred; French references critical; ESG/RSE credentials increasingly required in 87% of ESNs [Fact/Inference]
DIMENSION SCORE (Average)	74.3	<i>Average of sub-metric scores above</i>

CFS — Channel Fit Score | Weight ×0.20 | Score: 69.8

Sub-Metric	Score (0-100)	Evidence Note
Ecosystem Maturity	75	Mature: 673,000+ digital employees; 100+ ESNs ranked by Numeum/KPMG; 42% expect H1 2026 rebound [Fact]
Partner Availability	72	inetum, Devoteam, Neurones, Sopra Steria, CGI France, Econocom, Hardis Group [Fact]
Distribution Model Alignment	70	ESN body-shopping/staff aug model dominates; 30.2% IT outsourcing; consulting & implementation 27.3% [Fact]
Named Partner Access	62	Relationship-driven; French ESN market requires trust investment; partners prefer French-speaking sub-contractors [Fact/Inference]
DIMENSION SCORE (Average)	69.8	<i>Average of sub-metric scores above</i>

TDAS — Technical Delivery Alignment Score | Weight ×0.15 | Score: 55.3

Sub-Metric	Score (0-100)	Evidence Note
Certification Alignment	62	ISO 27001 achievable (80% overlap with HDS/SecNumCloud); HDS mandatory for health (3yr + annual audit); SecNumCloud limited to ~4 French-owned firms [Fact]
Support Complexity Fit	42	French L1-L3 mandatory; 24/7 for managed services; on-site governance/architecture roles; regulatory-aware delivery required [Inference]
Technical Capability Match	72	Big Data, cloud [Redacted] (SAP, Dynamics), RPA aligned to [Redacted] capabilities [Fact/Inference]
Delivery Model Fit	45	Onshore dominates 55.1%; nearshore (Poland, Romania, Morocco) preferred at 18.5% CAGR;

Sub-Metric	Score (0–100)	Evidence Note
		offshore less accepted; union opposition [Fact]
DIMENSION SCORE (Average)	55.3	<i>Average of sub-metric scores above</i>

OCF — Operating Cost Fit | Weight ×0.15 | Score: 70.5

Sub-Metric	Score (0–100)	Evidence Note
Gross Margin Potential	68	ESN operating margins 7–12%; hybrid India-delivery potential 15–25% uplift; target 25–40% gross margin [Inference]
Average Deal Size / ACV	72	Staff avg €100K–500K/yr; cloud €100K–500K; ERP €100K–500K+ [Fact/Inference]
Revenue Recurrence	60	ESN sector project-driven historically; staff aug renewed quarterly/annually; shift to managed-capacity models [Fact/Inference]
Cost Arbitrage Opportunity	82	French rates ~6–8x Indian rates — strong arithmetic but partially offset by French L1-L3 support overhead and union constraints [Fact/Inference]
DIMENSION SCORE (Average)	70.5	<i>Average of sub-metric scores above</i>

SALI — Sales Acceleration & Leverage Index | Weight ×0.10 | Score: 40.0

Sub-Metric	Score (0–100)	Evidence Note
Sales Cycle Length	42	3–9 months + 2–4 months trust-building for unknown vendors; ERP 6–12 months; budget aligned to calendar year [Inference]
Decision Complexity	42	3–6 stakeholders; DSI primary; CFO sign-off 79% of purchases; French mid-market expects 2–3 French customer references [Fact/Inference]
Existing Relationships / Beachhead	28	No French office, no French language capability, no French references documented — maximum cold-start penalty applies [Uncertain + Benchmark]
GTM Leverage	48	ESN sub-contracting model provides structured entry; 42% ESN H1 2026 rebound expectation creates partner motivation [Fact/Inference]
DIMENSION SCORE (Average)	40.0	<i>Average of sub-metric scores above</i>

France has the second-lowest SALI score in this assessment, reflecting an entry environment where trust is culturally capital-intensive and the absence of any existing French commercial presence, language capability, or customer references creates a

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Opportunity Drivers & Risks

Top 2 Opportunity Drivers	Top 2 Risks
[Blurred content]	[Blurred content]

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SECTION B — CROSS-MARKET COMPARISON TABLE

Sorted by GMFS score (highest to lowest). All dimension scores are averages of 4 sub-metrics scored 0–100 individually. BRS is inverted in the GMFS formula.

Market	EPI	BRS	CFS	TDAS	OCF	SALI	GMFS	Band	Rank Recommendation
UAE / GCC	83.0	35.0	75.8	78.0	84.3	73.8	77.4	Strong Fit	#1 Execute
United Kingdom	82.0	37.5	85.0	76.3	83.3	63.8	77.2	Strong Fit	#2 Execute
Netherlands	75.8	53.3	79.5	73.3	77.8	48.3	69.4	Conditional Fit	#3 Adjust then Enter
Belgium	73.3	56.8	70.5	68.8	73.3	49.3	65.2	Conditional Fit	#4 Adjust then Enter
Germany	85.0	77.0	71.8	55.0	83.8	56.8	63.6	Conditional Fit	#5 Adjust then Enter
Saudi Arabia	88.3	83.8	65.0	59.3	81.3	45.8	63.2	Conditional Fit	#6 Adjust then Enter
France	67.5	74.3	69.8	55.3	70.3	40.0	57.6	Conditional Fit	#7 Adjust then Enter

SAMPLE

SECTION C — KEY FINDINGS

8 analyst observations drawing cross-market insights from all seven GMFS assessments.

1 UAE and UK are clear Execute markets — start here.
Both score above 77 (Strong Fit), far ahead of the pack. The UAE benefits from *Government* existing Dubai office eliminating the cold-start problem entirely; the UK benefits from English language and the broadest, most mature partner ecosystem in EMEA. These two markets should capture the majority of GTM investment in the first 12 months.

2 *Germany is a Conditional Fit market with significant barriers to entry, including regulatory complexity and a fragmented market structure. While the market is large, the high cost of customer acquisition and the need for deep local relationships make it a challenging environment for new entrants.*

3 *France is a Conditional Fit market with significant barriers to entry, including regulatory complexity and a fragmented market structure. While the market is large, the high cost of customer acquisition and the need for deep local relationships make it a challenging environment for new entrants.*

4 *Japan is a Conditional Fit market with significant barriers to entry, including regulatory complexity and a fragmented market structure. While the market is large, the high cost of customer acquisition and the need for deep local relationships make it a challenging environment for new entrants.*

5 France is the only market where the delivery model itself faces documented cultural resistance.
While France's cloud (+27%) and Big Data (+15.7%) segments are healthy, the broader ESN sector grew only +0.7% in 2024, union opposition to offshoring is explicitly documented, and onshore delivery dominates 55.1% of spend. France should be entered last among the Conditional Fit markets, and only via ESN sub-contracting rather than direct sales. SecNumCloud is a non-negotiable barrier for sensitive sectors without a French or EU-majority entity.

6 *India is a Conditional Fit market with significant barriers to entry, including regulatory complexity and a fragmented market structure. While the market is large, the high cost of customer acquisition and the need for deep local relationships make it a challenging environment for new entrants.*

The company's financial performance is expected to remain strong in the coming year.

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SAMPLE