ISG Provider Lens™

Google Cloud Partner Ecosystem

A research report comparing strengths and advantages of Google Cloud partners

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Introduction

In 2024, Google Cloud made significant strides in improving its platform, introducing a series of advancements and innovations that solidified its position as a leader in the cloud computing space. From AI advancements and enhanced security to a robust multicloud strategy, Google Cloud remains committed to empowering businesses through cutting-edge technologies while delivering scalable and sustainable solutions.

At the forefront of these advancements is the integration of generative AI (GenAI), which has transformed the way businesses interact with data and build applications. Google Cloud has introduced powerful GenAI tools, such as Gemini, that enable organizations to create, refine and deploy content and applications with unprecedented efficiency. These tools incorporate sophisticated natural language processing capabilities that support the development of enterprise use cases across industries and business functions.

Security remains a top priority for Google Cloud. In 2024, it made significant enhancements in this domain. By leveraging AI for real-time threat detection, Google Cloud can identify potential security breaches more swiftly than ever. Additionally, advanced encryption methods and robust identity management systems ensure the protection of sensitive data amid the ever-evolving landscape of cyberthreats.

Google Cloud has also taken substantial steps toward sustainability, emphasizing its commitment to reducing carbon emissions and promoting sustainable technologies. It has introduced new tools and services to help organizations track and report their carbon footprint, enabling them to align their operations with global sustainability goals.

Google Ecosystem – 2025: Deep View

Cornerstones

Innovation
IP | Accelerators

Partnerships
Tiers | Types

Competency and Talent
Resources | Certifications

Industry Focus and Alignment

Experience and Engagement

Data Management Strategy
ESG | GRC | Security

Quadrants

GC Professional Services (Consulting and Migration)

GC Managed Services

GC Enterprise Data Infrastructure Services

GC GenAI and AI Services

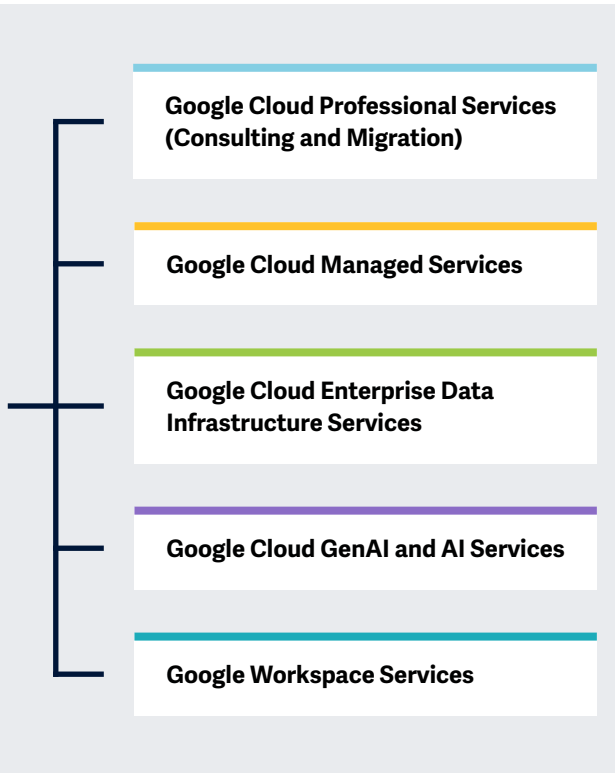**GC Workspace Services***

*Only for Brazil

Sections and Components

Consulting and Advisory (Business and Technology)			Architecture (Design and Build)		Migration and Multi Cloud Integration (Deployment Methodology–Anthos)		Modernization (Governance)	
Strategy and Transformation (Maturity Assessment and Roadmap)	Industry and Domain	ESG-GRC	Compute – Storage-Network Integrated Architecture	Cloud-Data-AI	Applications and Data Workloads	Cloud Security	ML	GenAI Applications

Cloud Operations (Run)				Performance			Optimize			
Orchestration	Observability	FinOps	DataOps – ModelOps – LLMOps – LangOps	Availability	IaaS	PaaS	GRC	ESG	SRE	PRE

Enterprise Data Ecosystem			Insights and Decision-making			Industry Focus Expertise & Solutions
BigQuery – Cloud SQL – Dataflow	Scalability and Performance	Workload Management Data Sovereignty	Predictive Analytics	Dashboards and Real-time Insights	Hyper Personalization	

GenAI with Google Gemini			Customized ML Solutions			DQM for AI; Data Sovereignty
Responsible GenAI	GEMINI – LLM	GenAI Capabilities	Industry-specific and Point Solutions	Enterprise LLM	Security and GRC practices	

Workspace Suite (Lifecycle Management of Apps)			Customization/Personalization			Productivity		
Deploy	Integrate	Manage	Stakeholder Experience	Collaboration Features	Easy Accessibility	Multi Channel	Work From Anywhere (WFA)	Self Service

Key focus areas of the Google Cloud Partner Ecosystem 2025 study.

Simplified Illustration Source: ISG 2025

Google Cloud Professional Services (Consulting and Migration)

Google Cloud Managed Services

Google Cloud Enterprise Data Infrastructure Services

Google Cloud GenAI and AI Services

Google Workspace Services

The ISG Provider Lens™ Google Cloud Partner Ecosystem 2025 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on different markets, including Asia-Pacific (APAC), Brazil, Europe and the U.S.

  APAC covers ANZ, India and the ASEAN-6* but excludes Japan, South Korea and China/Taiwan.

  ASEAN-6 — Indonesia, Malaysia, Philippines, Singapore, Thailand and Vietnam

Our study serves as an important decision-making basis for 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.

Note: A key pre-requisite for providers' participation is inclusion in the Google Cloud partner directory

Google Cloud Professional Services (Consulting and Migration)

Definition

This quadrant evaluates providers offering consulting, migration, implementation and integration services related to Google Cloud. Service providers support enterprises in effectively adopting and implementing Google Cloud solutions. Key evaluation attributes include the development of comprehensive cloud and AI adoption and opportunity assessment strategies tailored to specific industries and aligned with business objectives. Providers are expected to integrate ESG principles and governance, risk and compliance (GRC) considerations into their strategies for sustainable operations. Proficient design of scalable and secure architectures and the ability to leverage cloud, data and AI for intelligent operations are essential. Expertise in migrating data and AI workloads, minimizing disruptions and enabling hybrid environments via Google's Anthos platform is crucial.

Eligibility Criteria

1. Have a robust team of certified Google Cloud professionals, with expertise in **architecture, migration, multicloud integration (Anthos), and AI and ML solutions**

2. Offer comprehensive Google Cloud adoption strategies, including **maturity assessments, road maps and transformation plans**, tailored to diverse industry verticals

3. Deploy and manage **hybrid and multicloud environments using Google Cloud's Anthos platform**, ensuring seamless integration and operational consistency

4. Execute **large-scale application and data migrations** to Google Cloud with minimal business disruption and adherence to best practices

5. Design and implement scalable, secure and integrated architectures leveraging **Google Cloud's compute, storage, networking and data services**

6. Integrate **ESG** considerations and **GRC** frameworks into their service delivery

7. Showcase a strong portfolio of AI and ML-driven innovations, including expertise in deploying **GenAI and modernizing enterprise workloads** for operational efficiency

Google Cloud Managed Services

Definition

This quadrant assesses providers offering managed public cloud services to augment Google's built-in capabilities, including IaaS and PaaS. These services include orchestration, provisioning, real-time and predictive analytics, and management of public cloud and multicloud environments.

Providers offer customers significant levels of automation and transparency over the managed cloud resource pool using specially developed or licensed cloud management platforms (CMPs) and tools. SLAs for managed services encompass a wide range of offerings to drive business value, including data management and governance, ML capabilities, and ESG and sustainability tools and assets. Providers boast teams with Google Cloud-native skills, including cloud-native operations, site reliability engineering (SRE) and platform reliability engineering (PRE).

They also integrate practices such as DataOps, ModelOps, MLOps, AIOps and CloudFinOps. Google Cloud managed service providers leverage innovative intellectual property such as FinOps methodologies, automation systems, and frameworks for security, compliance and governance to enhance resilience.

Eligibility Criteria

1. Experience in **designing, building and migrating applications** and data warehouses on Google Cloud

2. Offer **robust security** and data governance protocols

3. Expertise in **authentication and access management** technologies and Google's SRE principles

4. Experience in **designing and operating platforms** for highly segregated data workloads

   across **hybrid and multicloud systems**, especially for regulatory compliance

5. Offer **cloud-native application** development and microservices

6. Experience in **API** automation, data science, AI and ML

7. Ability to measure and optimize **cloud-related carbon emissions** on Google Cloud

Google Cloud Enterprise Data Infrastructure Services

Definition

This quadrant is a benchmark for evaluating providers based on their offerings in the enterprise data ecosystem and insights and decision-making domains. Within the enterprise data ecosystem domain, providers are assessed on their ability to deliver big data platforms, including BigQuery, enabling seamless data integration and AI readiness. Key attributes include scalability and performance to meet growing business demands and effectively manage workloads. Additionally, data sovereignty is crucial for ensuring compliance with regulatory frameworks while optimizing resource allocation. In the insights and decision-making domain, service providers are evaluated based on their capabilities to enable actionable intelligence.

The capabilities include leveraging predictive analytics for strategic foresight, creating dashboards and real-time insights for operational agility, and offering hyperpersonalization to drive customer engagement and satisfaction.

Eligibility Criteria

1. **Deep technical expertise in Google Cloud solutions**, including **BigQuery, Cloud SQL and Dataflow**

2. Ability to implement scalable solutions that **optimize data performance for handling high-volume workloads**

3. Showcase **robust workload management practices while adhering to data sovereignty regulations**, enabling enterprises to maintain compliance across geographic and industry-specific requirements

4. Experience in **seamless data integration, transformation and real-time processing**

5. **Ability to deliver predictive analytics**

6. Expertise in creating **interactive dashboards and enabling real-time insights**

7. Expertise in **delivering hyperpersonalization solutions**

Google Cloud GenAI and AI Services

Definition

This quadrant evaluates service providers based on their offerings in two key areas: GenAI (Google Gemini) and customized AI and ML solutions, highlighting their ability to deliver enterprise-grade, secure AI solutions. In the GenAI space, providers are assessed on their ability to leverage responsible GenAI practices, ensuring ethical and bias-free AI applications. Their expertise in Google's large language model (LLM) — Gemini — is crucial for driving advanced conversational AI, natural language understanding and multilingual capabilities. Providers should demonstrate relevant GenAI capabilities in using training data, fine-tuning training models and ensuring high response quality. They should also implement different types of RAG models and use efficient generative algorithms beyond transformers. They must also have proficiency in search, retrieval and ranking techniques; content creation, summarization and automation; and reducing hallucination, irrelevance and inaccuracies.

Providers offering customized AI and ML solutions are evaluated based on their ability to deliver GRC-aware solutions, address challenges specific to industries such as healthcare, finance and retail, and ensure AI implementations meet enterprise-grade security and compliance standards.

Eligibility Criteria

1. **Expertise in deploying and managing Google Gemini** to deliver advanced conversational AI, multilingual support and content generation capabilities

2. Experience in **optimizing Gemini for diverse business use cases**

3. Exhibit focus on ethical AI development to ensure solutions are free from bias, comply with regulatory standards and align with **Google's guidelines for responsible AI implementation**

4. Showcase a track record of **leveraging multimodal and multimodel GenAI** in search, retrieval, ranking techniques, fine-tuning, RAG developments, content creation, summarization, workflow automation, efficient SLMs and new generative technique applications

5. Ability to build, deliver, maintain and scale **hybrid/mixed-model enterprise LLMs and agentic AI solutions**

6. Ability to implement robust **security and GRC frameworks** to ensure adherence to data privacy regulations across industries

7. Experience in **applying Google Cloud GenAI services** to solve complex business challenges

Google Workspace Services*

Definition

This quadrant assesses providers offering advisory, migration and integration services for Google Workspace. Workspace provides various applications, including Gmail, Docs, Sheets, Meet and Chat, to drive enterprise productivity and real-time collaboration. Google Workspace continues to grow rapidly and incorporates Google AI into its tools to accelerate work, simplify communications and automate tasks. Google's next-generation AI, Gemini Advanced, can tackle complex projects, such as coding, research and data analysis. It also enables the creation of Gems, teams of AI experts, to handle repetitive or specialized tasks.

Enterprises seek providers that can orchestrate, integrate and enhance the native workspace functionality by offering design and build services for intranets and websites, while integrating with other enterprise systems and third-party data sources and applications.

Providers should also offer training, change management services and advanced data analysis to harness the potential of Gemini-powered solutions.

Please Note: This quadrant is only applicable for Brazil.

Eligibility Criteria

1. Offer **advisory, design and consulting** services for Workspace services on Google Cloud

2. Provide **training and change management** services for Workspace using differentiated methodologies and frameworks to boost Workspace adoption

3. Execute **legacy migrations to Workspace**, especially from Lotus Notes-based on-premises email systems

4. Demonstrate advanced **content analytics and data search capabilities** across Workspace and integrate with external third-party data sources

5. Provide administration, **IT governance** and **security**

   services for data workloads and modern endpoint management

6. Offer services and frameworks to **accelerate low-code/ citizen developer** activities on Workspace and influence desired behaviors such as collaboration and data, code and content sharing

7. Ability to broadly **utilize Google AI for Workspace** to automate tasks, generate content, organize data and provide valuable insights for quick, accurate decisions

8. Ability to support clients in their **digital transformation journeys**, ensuring transparent communication and presenting **unique selling propositions** that transcend basic workplace solutions

Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following five quadrants on Google Cloud Partner Ecosystem 2025:

Quadrant	APAC	Brazil	Europe	U.S.
Google Cloud Professional Services (Consulting and Migration)	✔	✔	✔	✔
Google Cloud Managed Services	✔	✔	✔	✔
Google Cloud Enterprise Data Infrastructure Services	✔	✔	✔	✔
Google Cloud GenAI and AI Services	✔	✔	✔	✔
Google Workspace Services*		✔		

*Only for Brazil

The research phase falls in the period between January and February 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in July 2025.

Milestones	Beginning	End
Survey Launch	January 28, 2025	
Survey Phase	January 28, 2025	February 28, 2025
Sneak Preview	May 2025	June 2025
Press Release & Publication	July 2025	

Collecting client testimonials via the Star of Excellence™ Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the link to view/download the ISG Provider Lens™ 2025 research agenda.

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to the instructions in the invitation email to generate a new password. We look forward to your participation!

Buyers Guide

ISG Software Research, formerly "Ventana Research," offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Google Cloud Partner Ecosystem 2025 IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the Buyers Guide research schedule.

Research Production Disclaimer:

ISG collects data for the purposes of conducting research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
star@cx.isg-one.com

ISG Star of Excellence

The ISG Provider Lens 2025 – Google Cloud Partner Ecosystem research study analyzes the relevant service providers in the global 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 study will include data 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. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

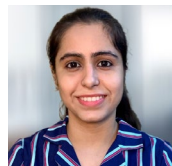All revenue references are in U.S. dollars ($US) unless noted.
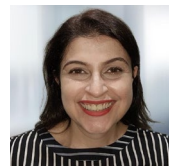
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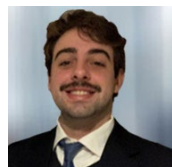(Brazil)**

Mark
Purdy

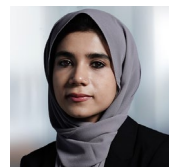**Lead Analyst
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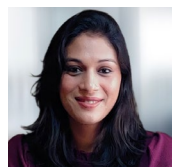Siddique

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ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process.

The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,

- Advise on service provider inclusion, participate in briefing calls,

- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study
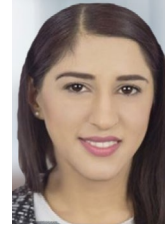
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Ahmed

Consulting Manager (Europe)

Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

66Degrees*	Cloud Ace	Dito LLC	Gentrop*
Accenture*	Cloud Mile Limited	DoiT*	GFT*
Aliz Technologies*	Cloud4C*	DXC Technology*	Globant*
Altostratus, Part of Telefónica Tech	Cloudside*	e360	Go Reply*
Ancoris*	CLOUDSUFI	Egen	GoPomelo
Appsbroker/CTS*	Codento	Embratel*	Grid Dynamics*
Artefact	Coforge	emergya*	HCLTech*
Atos*	Cognizant*	Engineering*	Hexaware Technologies
Avenue Code*	Computacenter*	EPAM Systems, Inc.	Hvar Consulting*
Brillio	CTS*	Eviden (Atos Group)*	IBM*
BRQ*	Datatonic*	EXL	Indra
Capgemini*	Deloitte*	Fractal Analytics*	Infogain*
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CI&T*	Dinova	Genpact*	Innova Solutions

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* Rated in previous iteration

intelia*	Netpremacy*	Promevo*	SFEIR*
IPNET*	Niveus Solutions*	PwC*	Sigmoid
Kasna/Mantel Group*	Noovle	Pythian	Slalom*
KPMG	Nordcloud*	Qi Network*	Softserve*
Kyndryl*	Noventiq*	Quantiphi*	Sonata Software
LTIMindtree*	NTT DATA*	Rackspace Technology*	Sopra Steria*
Lutech	Onix*	Revevol Group*	Systango
Making Science	Orange Business*	Revolgy*	TCS*
ML6	oXya*	Sabio*	Team Computers*
Movti*	PCG*	SADA*	Tech Mahindra
Mphasis*	Perficient	Safetec*	TEKsystems Global Services
Multiedro*	Persistent Systems*	SantoDigital*	ThoughtWorks*
NashTech	Pluto7	Sauter Digital*	TIVIT*
NCS Group*	PointStar	Searce	Tredence*

Invited Companies

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T-Systems*

uCloud*

UST

V8.Tech*

Venha Pra Nuvem*

Vexia*

Virtusa

VVDN Technologies*

WALT Labs

Wipro*

Woolpert Digital Innovations*

WWT*

Xebia*

Xtremax Pte. Ltd.*

YASH Technologies

Zencore

About Our Company & Research

ISG Provider Lens™

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

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

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

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ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

ISG Provider Lens™

JANUARY, 2025

BROCHURE: GOOGLE CLOUD PARTNER ECOSYSTEM