



***ISG** Provider Lens™

2022

Google Cloud Partner
Ecosystem 2022

imagine your future®

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 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 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 more than 1,300 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 www.isg-one.com.



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Definition

Google Cloud has become one of the most prominent cloud and technology providers in the world. The technology giant's capabilities and services have evolved rapidly in recent years, with Google Cloud underpinning the data workloads and applications of many of the world's leading enterprises. Google Cloud has significantly advanced application modernization through its creation of the open-source Kubernetes platform. It has also pioneered many developments, tools and assets in data analytics and machine learning.

Despite these advances, many enterprises still struggle to fully integrate the Google Cloud suite of technologies and capitalize on the rich native tooling and features of the platform. They therefore turn to the surrounding Google ecosystem, a complex community of global system integrators (GSIs), IT managed service and consulting providers, and ISVs, for help in many areas. These include migration and implementation; making better use of the native tools of the platform; licensing and cost management; developing expertise and skills; machine learning; and citizen developer initiatives. They are mainly seeking partners that can innovate atop the platform and help drive their IT and business transformation.

Enterprises that are taking an AI-driven innovation route to pivot to digital are naturally gravitating to Google as one of the key hyperscaler platforms, given its proven prowess in the AI technologies and algorithms space. They prefer service providers that have demonstrated capabilities in development, test and run services for Google Cloud Platform (GCP), and in AI/machine learning and big data applications in businesses. They are also looking for providers with a strong track record in delivery and ability to provide quality talent and trained and certified resources on GCP. Businesses also need providers with holistic and balanced capabilities that can help their organizations innovate in the post-pandemic environment. Customer requirements are now further augmented by increased environmental, social and governance awareness, data privacy and security practices and region-specific regulatory standards compliance.

ISG's analysis will focus on how Google Cloud Partners in Australia, Brazil, Europe and the U.S. are positioned, based on the strength of their respective portfolios and their competitiveness in the market. Although there are numerous providers in each of these regions that deliver services for Google Cloud products, this report will only focus on the top competitors, both global firms and local providers, for each of the quadrants studied by region.

The ISG Provider Lens™ study offers IT decision-makers the following:

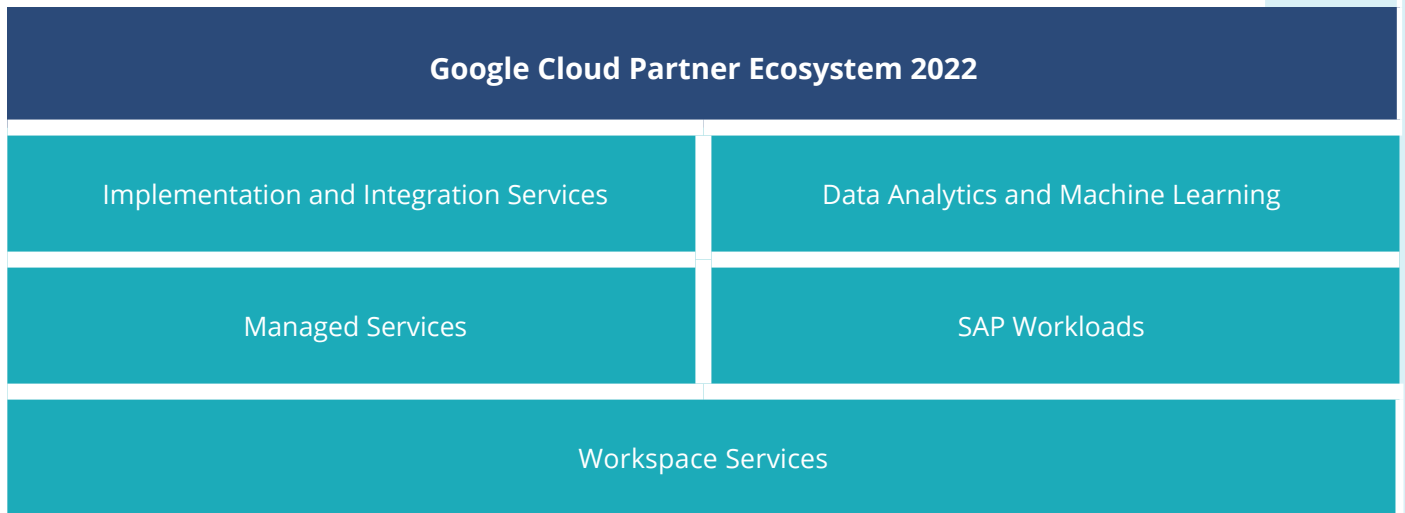
- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- A perspective on different markets, including Australia, Brazil, Europe and the U.S.

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 new engagements.

Quadrant Research

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

Simplified illustration



Source: ISG 2022

Implementation and Integration Services

This quadrant assesses GSIs and IT providers that offer migration, implementation, modernization and integration services for data workloads and applications on the GCP. These services include design, build and migration services; cloud-native application development; data warehouse migration and data modernization; support for hybrid and multicloud deployments; data security and governance models and protocols; and development of data science capabilities and machine learning tools. These services help clients achieve objectives such as cost reductions in data storage and management, better scalability and control over disparate data sources, greater scope for application of machine learning, data enrichment from joining internal data with external data sources, and the ability to derive insight from and monetize the organization's data.

Eligibility criteria

- Experience in designing, building and migrating applications and data warehouses on Google Cloud
- Robust security and data governance protocols
- Experience in authentication and access management technologies
- Experience in Google's site reliability engineering principles
- Experience in designing operating platforms for highly segregated data workloads across hybrid and multicloud systems (for example, for regulatory compliance purposes)
- Support for cloud-native application development and microservices
- Experience in application programming interface (API), automation, data science and AI/machine learning

Data Analytics and Machine Learning

This quadrant includes providers that showcase strongly differentiated capabilities in leveraging big data technologies and machine learning, especially in bleeding-edge deep learning algorithms and API libraries available and accessible through GCP. These include Tensorflow, Dialogflow, Kubeflow, BERT, GLaM, MURAL applications, federated learning algorithms, Vertex AI, AutoML, responsible and explainable AI, computer vision, augmented reality, virtual reality and extended reality applications, and IoT. In addition, foundational capabilities in big data and machine learning on the GCP should be demonstrated at scale such as using CloudSQL, Cloud Dataproc, BigQuery, Cloud Datalab and Datastore, running and developing solutions/services on the migrated workloads from MySQL, and Hadoop/Spark/Hive in the GCP.

Eligibility criteria

- Scope and use of relevant tools and technologies
- Holistic DAML services and solutions integration and innovation capabilities and offerings
- Scope and availability of enabling practices and programs for talent and skills upgrades to ensure customer success (for example, consulting/best practice frameworks, ROI and business case development)
- Availability, experience and certifications of resources and competencies in the GCP DAML-related tech stacks
- GCP-focused offerings, roadmap and innovations (current and planned)
- Number and reputation of references with regard to DAML services and solutions on GCP
- Pricing models and partner/channel relationships

Managed Services

The quadrant assesses managed public cloud service providers that offer professional and managed services that augment Google's built-in capabilities, including IaaS and PaaS. The professional and managed services include orchestration, provisioning, real-time and predictive analysis, and monitoring and operational management of a customer's public cloud and multicloud environment. The aim is to maximize performance of enterprise cloud workloads, reduce costs, and ensure compliance and security. Typically, specially developed or licensed cloud management platforms and tools are used to provide customers with the highest level of automation and the necessary transparency over the managed cloud resource pool, in terms of capacity utilization and costs, including independent management.

Eligibility criteria

- Experience in designing, building and managing public and multicloud environments with a focus on Google Cloud
- Support in the development of software code, cloud native and legacy system integration
- Experience in implementing both Agile and DevOps, as well as integrating with clients' existing processes
- Experience in API automation and cloud analytics
- Well-developed security practices and capabilities
- Number and location of provider resources that assist enterprises with Google Cloud
- Strength of the provider's partnership with Google Cloud, measured by the number and category of relevant certifications, duration of relationship with Google, and evidence of strategic cooperation between the provider and Google

SAP Workloads

This quadrant assesses service providers that offer provisioning and ongoing operation for SAP systems such as SAP HANA on Google and their central management. These service providers not only help implement Google as a sheer hardware replacement or hardware extension (IaaS) in the customer companies, but also optimize, design and develop new processes and business flows as part of platform management through a combination of their own services, SAP services and Google. This group of professional IT service providers is, thus, responsible for implementing and ensuring subsequent operation. Successful service providers must have a strong relationship with Google and SAP with investment roadmaps.

Eligibility criteria

- Scope and depth of service portfolio with regard to the migration of workloads to SAP on Google
- Ability to develop and design new processes and customer outcomes for SAP on Google; particular relevance to industry capabilities is important
- Customization, provisioning and support for the implementation of SAP applications and services
- Number and location of employees that provide SAP on Google services
- Ability and willingness to support hybrid cloud and hybrid provider environments
- Robustness of the provider's process for implementation, including the use of Agile and DevOps methodologies, as well as relevant automation for service delivery and quality
- Strength of the provider's relationship with Google Cloud, measured by the number and category of Google Cloud Certifications with the Google Certified Cloud Program, and strength of relationship with SAP, measured by relevant SAP certifications
- Experience in Google's site reliability engineering principles

Google Workspace Services

This quadrant assesses GSIs and IT providers that offer advisory, migration and integration services for Google Workspace, Google's suite of productivity, collaboration and content tools for enterprises. Workspace provides a broad range of apps, which include Gmail, Meet, Chat and Drive, to drive enterprise productivity and real-time collaboration. Emerging out of the previous G-suite productivity package, Google Workspace continues to develop rapidly, incorporating intuitive analytics, along with numerous data and device administration and security features. Google Workspace brings personalized user experiences into the controlled and secure enterprise environment, enabling multidevice and multichannel workspace integration and helping users get a seamless experience across their professional communications and content-sharing practices. Enterprises are seeking providers that can orchestrate, integrate and augment the native functionality of Workspace, for example, through design and build services of intranets and websites; integration with wider enterprise and third-party data sources and applications; providing training and change management services; providing advanced data search and retrieval capabilities; providing license and cost management; and enabling advanced security management for data and devices. Above all, enterprises are looking for providers that can seamlessly integrate Workspace's native tools and make data and content flow seamlessly across an enterprise.

Eligibility criteria

- Ability to offer advisory, design and consulting services for Workspace services on Google Cloud
- Experience in providing training and change management services for Workspace services, using differentiated methodologies and frameworks for increasing the adoption of Workspace
- Experience in legacy migrations to Workspace, especially from Lotus-Notes-based on-premise email systems
- Demonstrate advanced content analytics and data search capabilities for company content across Workspace, as well as integration with external third-party data sources.
- Administration, IT governance and security services for data workloads and modern end-point management;
- Offer services and frameworks to accelerate low-code/citizen developer activities on Workspace and influence desired behaviors such as collaboration and data/code/content sharing
- Provision of organization-specific data analytics and insights around Workspace such as adoption rates, patterns of working and collaboration

Quadrants by Region

Quadrant	Australia	Brazil	Europe	U.S
Implementation and Integration Services	√	√	√	√
Data Analytics & Machine Learning	√	√	√	√
Managed Services	√	√	√	√
SAP Workloads	√	√	√	√
Workspace Services		√	√	√

Schedule

The research phase falls in the period between **February and June 2022**, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in **July 2022**.

Milestones	Beginning	End
Survey phase	February 24, 2022	March 25, 2022
Sneak previews	June 2022	
Content provisioning	July 2022	
Press release	July 2022	

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2022 research agenda:

Access to Online Portal

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

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@isg-one.com

Research production disclaimer:

ISG collects data for the purposes of writing 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 work identified by the 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 to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of 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.

Partial list of companies being invited for the survey

Are you in the list or do you see your company as a relevant provider that is missing in the list? Then feel free to contact us to ensure your active participation in the research phase.

66 Degrees	Claranet	Devoteam G Cloud
Accenture	Cloud Ace	Dito LLC
Acuvate	Cloud Fresh	DoIT International
Agile GCP Labs	Cloud4C	Dotmodus
Agosto	CloudAce	DXC Technology
Ancoris	Cloudbakers	EPAM
Appsbroker	Cloudmile	Fujitsu
Artefact	Cloudreach	Genpact
Arvato Systems	Cognizant	Gentrop
Atos	Computacenter	Gigster
Bespin Global	Core Compete	Go reply
Birlasoft	Crayon	HCL
Cancom	CTS	Hexaware
Capgemini	Datafix	Hltachi Vantara
Capita	Datametica solutions	HPE
Cignex Datamatics	Deloitte	IBM

Partial list of companies being invited for the survey

Are you in the list or do you see your company as a relevant provider that is missing in the list? Then feel free to contact us to ensure your active participation in the research phase.

Incentro	Oxya corporation	SoftwareOne
Infosys	Persistent Systems	Sonata Software
Injenia SRL	Pluto7 International	Sopra Steria
KPMG	PWC	SpringML
Lineout Servicios Informaticos S.A	Pythian	Suitebriar
Logicalis	Quantiphi	Taos
Mavenwave	Rackspace Technology	TCS
Mediaagility	Redapt	Tech Mahindra
Mindtree	Reeducation	Teksystems
MP Additions	SADA	TietoEvry
Mphasis	Searce	Virtusa
Netpremacy	Slalom	Wingu Networks
Nordcloud Oy	Softcat	Wipro
NTT Data	Softchoice	Zensar
Onix	Softserve	

Contacts for this study



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ISG Provider Lens QCRT Program Description

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 advisors participate as part of each study's Quality & Consistency Review Team (QCRT). The QCRT ensures 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 QCRT 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 providers inclusion, participate in briefing calls,
- give their perspectives on service provider ratings and review report drafts.

The ISG Provider Lens QCRT program helps round out the research process, supporting comprehensive research-focused studies.

Quality & Consistency Review Team for this study



Bernie Hoecker
Partner



Michael Gale
Partner

Do you need any further information?

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.