

# Google Cloud Partner Ecosystem

A research report comparing provider strengths,  
challenges and competitive differentiators



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### **The Google ecosystem is becoming larger and more dynamic than ever before.**

The Google Cloud ecosystem continues to grow in scale, scope and variety of technology services and solutions. As the smallest of the three main hyperscalers, Google Cloud has been in the shadow of the Azure and AWS public clouds and associated ecosystems for several years. No longer. Since the launch of our inaugural Google Cloud Ecosystem report in 2022, ISG has seen rapid growth in the Google ecosystem, with providers making significant co-investments with Google, ramping up skills and certifications, setting up dedicated Google Cloud business units, and driving more workloads and data migrations to the Google Cloud Platform (GCP). ISG's 2023 study, based on extensive provider briefings and detailed primary and secondary research, provides a comprehensive overview of the ecosystem, along with an analysis of strengths and development areas of individual providers

across five distinct quadrants: Implementation and Integration Services; Data Analytics and Machine Learning; Managed Services; SAP Workloads; and Workspace Services.

While the growing market heft of Google Cloud can be attributed to many factors, our analysis indicates three primary factors driving its popularity among enterprise decision-makers and ecosystem providers.

First, enterprises are increasingly looking to Google Cloud to extract greater value from enterprise data—to liberate relevant data from enterprise and departmental siloes, standardize that data, combine it with external data sources, ask the right questions of it, and finally get the resultant insights in a meaningful form to enterprise decision-makers. These are all areas in which Google Cloud and its AI-first suite of tools and solutions excel, with enterprises using GCP-native tools such as BigQuery, Vertex AI, Bard (generative AI) and TensorFlow; data meshes and fabrics such as Dataplex and Dialogflow (for conversational AI); and others. However, before cutting-edge AI techniques can be applied, significant efforts are needed to standardize and modernize data

Gaining greater **value**  
from **enterprise**  
**data** is a prime  
driver of the Google  
ecosystem.



## Executive Summary

platforms. This is where ecosystem providers play a crucial role, bringing a panoply of data migration frameworks, accelerators and automation solutions that enable faster and smoother transfer of databases into BigQuery format on GCP.

However, the role of ecosystem providers goes way beyond just data migration and modernization. Providers are critical in helping enterprises with data governance and compliance, creating analytical tools and dashboards for visualizing data, developing responsible AI frameworks, and identifying and developing specific AI/ML use cases. A notable development this year is the emergence of more industry and domain-focused AI/ML use cases; for example, the use of Vertex AI to turbocharge drug discovery in life sciences, AI platforms providing end-to-end visibility into grocery supply chains, or solutions to glean marketing insights from consumers' online browsing habits. Some providers are integrating Google's AI tools with IoT and edge computing technologies to provide insights into distributed energy infrastructure or enhance situational awareness for logistics and fleet management

operators. Yet others are building immersive conversational AI solutions to enhance CX and enabling data for digital twin simulations and industrial metaverse applications.

Second, sustainability remains a key driver of GCP adoption. With data centers consuming around 3 percent of the total global energy supply annually and ICT infrastructure responsible for up to 3.9 percent of global carbon emissions, many enterprises consider the sustainability of computing infrastructure and operations as core to achieving net-zero goals[1]. With its focus on green and renewable energy use, GCP becomes a strong choice for enterprises looking to reduce their broad IT-related carbon footprint. Yet Google Cloud's sustainability credentials extend far beyond the carbon footprint of the platform itself: Google Cloud increasingly provides a platform and toolset to help enterprises embed wider sustainability improvements across their organizations. Many providers use GCP to create environmental, social and governance (ESG) reporting and analysis tools; some create GCP-based offerings around climate-risk intelligence or supplier sourcing risks in far-

flung supply chains; and others implement SAP solutions on GCP to manage product carbon footprints.

The third driver of GCP's growth relates to cloud economics. In an environment of weak economic growth and persistent inflationary pressures, cloud spending—and how to optimize it—has become a growing preoccupation for enterprise IT leaders. GCP is attractive because of its generally competitive pricing and its ability to support enterprises' multicloud strategies, reducing the risks of technical lock-in, increasing bargaining power vis-à-vis the other hyperscalers, and providing a raft of open-source and integratable tooling. Google Anthos also provides a versatile platform for firms following a multicloud-native strategy.

Ecosystem providers play a key role in helping firms optimize their cloud economics, for example, by providing consulting and advisory services that help firms evaluate different cloud options and create roadmaps for a multicloud strategy. This year ISG notes the growing prominence of sophisticated FinOps

frameworks and tools developed by several providers for GCP and other public clouds. These FinOps tools can measure cloud spend and relative usage down to the departmental or team level, identify opportunities to eliminate unnecessary cloud spending, re-allocate capacity to areas of higher business demand, and potentially institute charge back mechanisms in areas of overspending.

Within this broad picture of GCP growth and evolution, several other trends were evident in the Google Cloud ecosystem. Generative AI—a class of large-language ML models that can create text, images, and code—has penetrated the public consciousness and attracted huge media attention, notably through OpenAI's ChatGPT. Most major Google ecosystem providers are experimenting with transformer models in some fashion, and several are launch partners for Google Cloud's Bard platform. However, full-fledged, enterprise-grade applications of generative AI are still scarce. Many solutions are still at a nascent stage, with the promise of more dramatic innovations to come.



With the rapid growth of the Google ecosystem, GCP skill gaps are becoming a significant challenge for many service providers, particularly in areas such as data engineering, ML and site reliability engineering (SRE). Service providers are responding by ramping up their investment programs in GCP certifications, drawing on global and regional delivery models and developing more talent versed in multicloud deployments and operations.

The overall market for cloud services in Europe remains mixed, with growth dampened by the global tech slowdown, a sluggish economy and increased pressure on IT budgets. According to the ISG Index, the demand for IT and business services in Europe declined by 5 percent YoY in the first quarter of 2023, with managed services declining by 4 percent YoY and cloud-based services down by 6 percent. Regional demand varied, with U.K. managed services down by 2 percent YoY, and DACH down by 21 percent YoY, but France managed services revenues remained buoyant with 27 percent YoY growth. EMEA IaaS dropped 10 percent YoY in the

first quarter, with the top three hyperscalers experiencing a 12 percent YoY decline, the first ever recorded.

Yet within this overall picture of slowing cloud consumption in Europe, Google Cloud appears relatively resilient. Nearly every ecosystem provider we surveyed for this report saw increasing demand for GCP and related services in Europe. Demand remains robust in the U.K., moderate in the DACH and Benelux regions, and relatively weak in the Nordics. Google Cloud's ability to weather the broader tech slowdown is due in part to its focus on the areas that are now top-of-mind for enterprise IT decision-makers: demand for big data, ML and analytics capabilities; the need for data modernization and integration; the growing sustainability imperative at the C-level; an increased focus on cloud economics and FinOps solutions; and the increasing integration of data and cloud strategies. With pressure on enterprise budgets, some providers see more demand for fast-cycle POCs and projects with clear ROI in Europe. However, enterprises are

still cautious with their risk appetites for wider cloud transformation, and demand for lift-and-shift implementations on GCP is still significant. Finally, with European regulations around data and AI continuing to emerge, there is a growing demand for sovereign cloud solutions for GCP in Europe, with enterprises looking for additional capabilities to secure and segregate their data within defined geographic borders.

**Ecosystem providers are ramping up Google Cloud certifications, aligning go-to-market strategies and setting up dedicated business units to capture the growing Google Cloud market opportunities in Europe.**



 Provider Positioning

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	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Accenture	Leader	Leader	Leader	Leader	Leader
Aliz	Contender	Product Challenger	Contender	Not In	Not In
Ancoris	Product Challenger	Rising Star ★	Product Challenger	Not In	Product Challenger
Appsbroker	Product Challenger	Not In	Contender	Not In	Not In
Atos/Eviden	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
Capgemini	Not In	Not In	Not In	Not In	Leader
Cognizant	Leader	Leader	Product Challenger	Product Challenger	Not In
Computacenter	Product Challenger	Not In	Not In	Not In	Not In
CTS	Product Challenger	Not In	Not In	Not In	Product Challenger



 Provider Positioning

	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Datatonic	Not In	Product Challenger	Not In	Not In	Not In
Deloitte	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Devoteam G Cloud	Market Challenger	Not In	Product Challenger	Contender	Product Challenger
DoIT	Not In	Contender	Not In	Not In	Not In
DXC Technology	Not In	Not In	Not In	Product Challenger	Not In
Emergya	Not In	Product Challenger	Not In	Not In	Not In
Genpact	Not In	Product Challenger	Not In	Not In	Not In
GFT	Not In	Leader	Not In	Not In	Not In
Go Reply	Product Challenger	Contender	Not In	Not In	Not In



 Provider Positioning

	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Grid Dynamics	Contender	Not In	Not In	Not In	Not In
HCLTech	Leader	Leader	Leader	Leader	Leader
Infosys	Product Challenger	Leader	Leader	Product Challenger	Product Challenger
Kyndryl	Product Challenger	Contender	Contender	Contender	Not In
LTIMindtree	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
Mphasis	Product Challenger	Product Challenger	Contender	Contender	Not In
Netpremacy	Not In	Not In	Not In	Not In	Product Challenger
Nordcloud	Not In	Not In	Not In	Not In	Contender
oXya	Not In	Not In	Not In	Product Challenger	Not In



 Provider Positioning

	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Persistent Systems	Product Challenger	Product Challenger	Not In	Not In	Not In
Promevo	Not In	Not In	Not In	Not In	Contender
Quantiphi	Not In	Leader	Not In	Not In	Not In
Rackspace Technology	Product Challenger	Not In	Product Challenger	Product Challenger	Not In
Reveol	Not In	Not In	Not In	Not In	Contender
Revolgy	Not In	Not In	Contender	Not In	Contender
Sabio	Not In	Product Challenger	Not In	Not In	Not In
SFEIR	Contender	Contender	Not In	Not In	Not In
Softserve	Not In	Product Challenger	Not In	Not In	Not In



 Provider Positioning

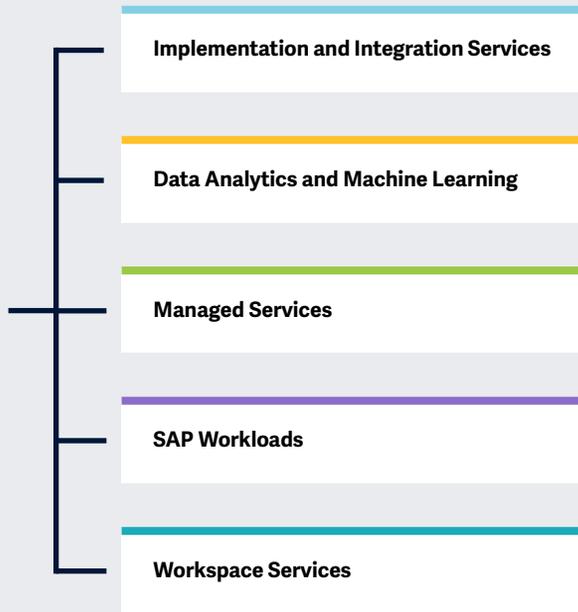
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	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Sopra Steria	Market Challenger	Not In	Market Challenger	Not In	Not In
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Leader	Rising Star ★	Not In	Not In
T-Systems	Rising Star ★	Not In	Leader	Product Challenger	Not In
Wipro	Leader	Leader	Leader	Leader	Leader



# Key focus areas of Google Cloud Ecosystem 2023 study.

Simplified Illustration; Source: ISG 2023



## Definition

Google Cloud is one of the world’s most prominent public cloud and technology providers. The technology giant’s capabilities and services have evolved rapidly in recent years, with Google Cloud supporting the data workloads and applications of several leading enterprises. It has significantly advanced application modernization by developing Kubernetes, an open-source container orchestration platform. It has also pioneered developments, tools and assets in data analytics and machine learning.

Despite these advances, many enterprises struggle to fully integrate the Google Cloud suite of technologies and capitalize on the platform’s rich native tools and features. They therefore seek assistance from the ecosystem surrounding Google Cloud, a community of global system integrators (GSIs), IT-managed service and consulting providers and ISVs. These providers have many capabilities and specializations, including migration and implementation, licensing and

cost management, governance and security, application development, machine learning, automation and citizen development.

Given Google Cloud’s proven expertise in AI technologies and algorithms, enterprises prefer service providers with demonstrated capabilities in developing, testing and running machine learning (ML) and big data applications on the platform. Other requirements include a strong delivery track record and the ability to provide quality talent and staff certified in GCP. Enterprises also look for providers to help develop new industry use cases, implement collaborative and productive hybrid work models, and develop effective tools and systems to meet environmental, social and governance (ESG) goals.



### Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following 5 (number of quadrants) quadrants for services: Implementation and Integration Services, Data Analytics and Machine Learning, Managed Services, SAP Workloads, and Workspace Services.

This ISG Provider Lens™ study offers IT decision makers with the following:

- Transparency on the strengths and weaknesses of relevant providers/
- A differentiated positioning of providers by segments (quadrants)
- Focus on regional market

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

### Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).





### Provider Classifications: Quadrant Key

**Product Challengers** offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

**Contenders** offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

**Leaders** have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

**Market Challengers** have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

**Not in** means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





# Implementation and Integration Services

### Who Should Read This Section

This report is relevant to enterprises across industries in Europe for evaluating the ability of providers offering implementation and integration services that help design, build and migrate services in hybrid and multicloud environments.

In this quadrant, ISG highlights the current market positioning of Google Cloud providers in Europe and how they address the critical challenges in the region. Our assessment is based on the depth and breadth of the providers' service offerings and market presence.

Enterprises embrace several serverless tools for scalable, event-driven applications and services, such as Cloud Functions and Cloud Run. They are also interested in developing reference architectures, using automation solutions, and leveraging DevOps tools and CI/CD practices during implementation to provide faster time to market.

Low code/no code is another major focus area among enterprises, and they have been investing in GCP tools such as Google AppSheet and BigQuery ML, which are anticipated to grow in the next few quarters.

Enterprises partner with providers with end to end implementation capabilities, along with hybrid and multicloud setups offering the highest level of security for applications and infrastructure. Providers should possess quality talent, global delivery capabilities and a tailor-made pricing model to be a preferred partner.



**Technology Professionals** should read this report to know providers' relative positioning and capabilities to effectively use Google Cloud implementation and integration services and how they are compared in the market.



**Procurement professionals** should read this report to understand the capabilities of Google Cloud implementation and integration service providers in Europe and the competitive edge offered by them.

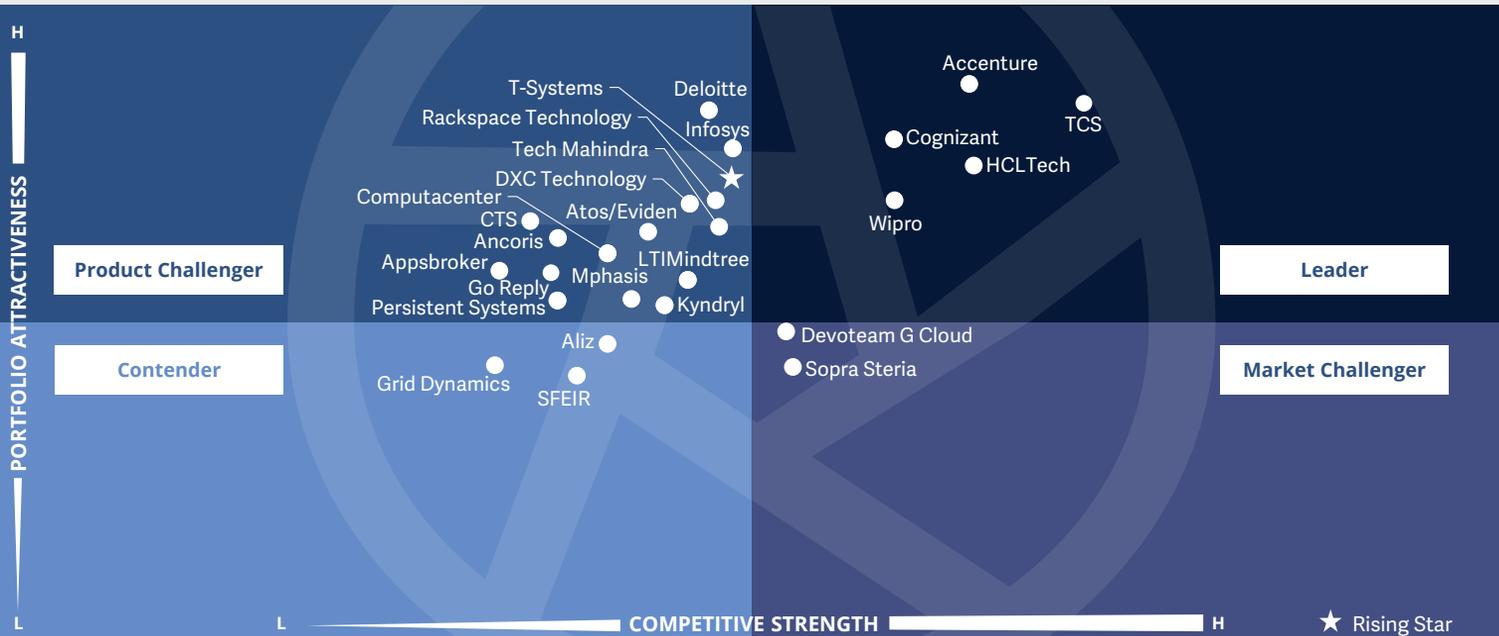


**Digital Professionals** should read this report to know the positioning of Google Cloud implementation and integration providers and how they can impact clients' ongoing transformation initiatives.



**Google Cloud Partner Ecosystem  
Implementation and Integration Services**

Europe 2023



This quadrant assesses service providers that offer **implementation, migration and modernization services for GCP**. Providers emphasize **multicloud** strategies using GCP, with a focus on **FinOPs** and **cloud security**.

Mark Purdy



## Implementation and Integration Services

### Definition

This quadrant assesses GSIs and IT providers that offer migration, implementation, modernization and integration services for data workloads and applications on the GCP. The services include design, build and migration services; developing cloud-native applications; data warehouse migration and modernization; support for hybrid and multicloud deployments (including via Google Anthos); data security and governance models and protocols; and developing data science capabilities and machine learning tools. These services help clients achieve goals such as lowering data storage and management costs, improving scalability and control over disparate data sources, expanding the scope of machine learning, enhancing data by joining internal data with external data sources, monetizing data and deriving insights from the organization's data. Providers are also increasingly adding intelligent automation features and FinOps tools to help enterprises keep cloud costs under control.

### 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. Experience in **authentication and access management** technologies
4. Experience in Google's site **reliability engineering** (SRE) principles
5. Experience in **designing and operating platforms** for highly segregated data workloads across **hybrid and multicloud systems**, such as for regulatory compliance purposes
6. Support for **cloud-native application** development and microservices
7. Experience in **application programming interface (API)**, automation, data science, AI and machine learning
8. Experience in measuring and optimizing **cloud-related carbon emissions** on the GCP



## Implementation and Integration Services

### Observations

Demand for Google Cloud integration and implementation services in Europe continues to grow, with an increasing need for traditional lift-and-shift migrations and multicloud modernization projects. ISG discerns several trends within this space. First, many service providers have invested significantly in assets and accelerators to speed the migration to GCP, incorporating workload discovery tools, pre-configured environments and automation features. Second, nearly every leading provider now infuses strong sustainability and ESG features into its cloud architectures and solution sets for GCP, such as green clouds and application architecture, energy use and carbon footprint cloud reporting tools, or specific offerings around climate intelligence or supply chain sourcing risks. Third, although not yet on the scale of the Azure industry clouds, providers invest in a raft of industry and point solutions for GCP in areas as diverse as digital banking, 5G telecoms, manufacturing supply chains and healthcare payment systems. Fourth, with the global slowdown

in cloud spending and increased business focus on cloud costs, many providers focus on optimizing cloud costs through ever more analytical FinOps tools and frameworks or using SRE and global/regional delivery models. Fifth, enterprises are still extremely cautious about the location and security of their data on public clouds, especially in highly regulated industries. Complying with European data sovereignty rules is also a major concern for enterprises in the region. Providers respond with specific sovereign-cloud offerings, incorporating additional safeguards and firewalls around the geographic storage of their cloud systems and data.

From the 35 companies assessed for this study, 25 have qualified for this quadrant with five being Leaders and one Rising Star

### accenture

**Accenture's** large global Google Business Group offers a wide range of industry, functional and horizontal (technology) solutions for GCP. It continues to invest in growing its substantial base of Google Cloud professionals and certifications.

### cognizant

**Cognizant** offers a wide range of industry and functional solutions for GCP, focusing on ESG. It also has expertise in deploying edge solutions on GCP. Cognizant has won several important GCP clients recently.

### HCLTech

**HCLTech** offers a comprehensive range of implementation and integration services for GCP, with a focus on sustainability-based transformation. It has recently expanded its existing network of nine Google Cloud delivery centers, with an additional three in Romania, Poland and Canada.

### tcs TATA CONSULTANCY SERVICES

**TCS** offers a comprehensive set of implementation and migration services for GCP. It continues to invest significantly in growing its talent base through its G-Skool virtual coaching school for GCP certifications.

### wipro

**Wipro** has significantly increased its focus on Google Cloud, realigning its go-to-market model with the Google Cloud business, ramping up GCP certifications, and investing in developing a comprehensive range of new industry solutions for GCP.

### T Systems

**T-Systems** (Rising Star) emphasizes its Sovereign Controls offering, incorporating a host of infrastructure and data controls to help clients meet infrastructure and data sovereignty requirements on GCP.





“Significant investment in talent, a wide range of industry solutions, and powerful accelerators make Accenture a leader in implementation and integration services for GCP in Europe.”

Mark Purdy

# Accenture

## Overview

Accenture is headquartered in Dublin, Ireland and operates in 49 countries. It has more than 738,000 employees across 200 global offices. In FY22 the company generated \$61.6 billion in revenue, with Consulting as its largest segment. Accenture has achieved nine Google Cloud Specializations, including Infrastructure, Application Development, Security and Migration to Cloud. It has won the Google Cloud Partner award 14 times. It has also received the 2021 Global Google Cloud Services Partner of the Year award. Accenture has a large client base for its integration and implementation services for GCP in Europe and a significant cohort of GCP practitioners in the region.

## Strengths

**Triple-layered approach:** Accenture has a large, global Google Business Group with a tripartite structure consisting of industry, functional and horizontal technology solutions offerings. Its industry solutions cover 10 industries, including life sciences, banking, manufacturing and the public sector. The functional solutions address cross-cutting enterprise needs associated with digital (data) sovereignty, sustainability, supply chains, customers, etc. This triple-layered structure indicates that Accenture can offer a wide range of solutions and strong expertise in integration and implementation projects on GCP.

**Global network:** Accenture's GCP offerings are backed by its more than 100 cloud innovation centers, including six in Europe.

**Expanding talent base:** Accenture Google Business Group has more than 7,000 Google Cloud practitioners globally and over 8,700 active certifications. It continues to invest in upskilling its talent and aims to achieve 15,000 Google Cloud certifications by 2025.

**Assets and accelerators:** Accenture offers many powerful assets to help clients securely accelerate their migration to GCP. These include its Secure Cloud Foundation (a fully automated GCP architecture, including pre-configured environments, Terraform scripts and policies) and MyNav suite of solutions for migration, automation and business case builders.

## Caution

Accenture should better showcase its GCP credentials and client stories in Europe, as many enterprises in this region are generally less familiar with Google Cloud. Accenture's strategy is mainly built around offerings suitable to very large enterprises, which may make its services appear less accessible to midsize enterprises.





“A strong focus on innovation and an impressive set of industry solutions make Cognizant a leader in integration and implementation services for GCP in Europe.”

Mark Purdy

# Cognizant

## Overview

Cognizant is headquartered in New Jersey, U.S. and operates in 42 countries. It has more than 355,300 employees across 162 global offices. In FY22 the company generated \$19.4 billion in revenue, with Financial Services as its largest segment. Cognizant has four Google Cloud Specializations, including Infrastructure and Application Development. Cognizant has a significant client base for its implementation and integration services in Europe and a substantial cohort of professionals in the region.

## Strengths

**ESG focus:** Cognizant offers a wide range of ESG-focused services and solutions, including ESG reporting and data management (with data visualizations and reporting automation, circular economy products and services, sustainable IT (for example, green clouds and green application architectures), digital twins, and sustainable supply chains (for example, ESG due diligence and supply chain transparency).

**Key wins:** Cognizant has recently won several important clients in the GCP-related implementation and integration space. These include a major U.K. supplier of home improvement products, a leading U.K. retail bank, a global European pharmaceuticals manufacturer and a major U.K. provider of plumbing services.

**Innovation mindset:** Cognizant has created or co-created several solutions for GCP. For example, its Cloud Steps Framework is a methodology for accelerating workloads' discovery and migration to GCP. Its APEx for GCP is an IoT solution that helps manufacturers garner data from industrial machines for analytics and ML applications.

**Industry solutions:** Cognizant offers solutions in healthcare (payer and providers), BFS (for example, regulatory reporting technology), manufacturing (for example, supply chain control tower), and communications, media and technology (for example, digital service marketplace).

## Caution

Cognizant can benefit from providing more insights into how the Servian and Contino acquisitions influence its overall service offering for GCP.



# HCLTech



“A comprehensive offering, a strong sustainability focus and a significant experience in the digital transformation of major clients make HCLTech a leader in implementation and integration services for GCP in Europe.”

Mark Purdy

## Overview

HCLTech is headquartered in Noida, India and operates in 60 countries. It has more than 222,200 employees across over 215 delivery centers worldwide. In FY22 the company generated \$11.48 billion in revenue, with IT and Business Services as its largest segment. HCLTech has five Google Cloud specializations, including Infrastructure – Services and Cloud Migration – Services. In 2020 it was awarded Specialization Partner of the Year – Infrastructure, and in 2021 it won Breakthrough Partner of the Year. HCLTech has a significant client base for its infrastructure and implementation services for GCP in Europe, and it has a substantial number of dedicated resources in the region.

## Strengths

**Commercial flexibility:** HCLTech provides an outcome-based/risk-sharing pricing model for its overall commercial mix, which is likely to appeal to both budget-constrained enterprises and those embarking on broader business transformation efforts.

**Focus on sustainability:** Sustainability is a key aspect of HCLTech’s digital transformation projects. It has created an ESG reporting tool using GCP as the preferred platform. It has a dedicated ESG practice and a sustainability-focused lab for co-innovating with clients.

**Comprehensive offering:** HCLTech offers services across all aspects of GCP implementation and integration, including cloud readiness assessments, data center

exits and transformation, hybrid and multicloud deployment, Google Anthos deployments, cloud-native development, application development and data modernization. It also offers integration with third-party platforms, such as ServiceNow and Salesforce, external data sources, and automation capabilities and expertise in Google’s SRE principles.

**Client traction:** HCLTech has undertaken complex, multi- and hybrid cloud implementations using GCP for large enterprises in Europe and beyond. For example, it has developed a multiregion cloud landing for a major consumer goods company.

## Caution

HCLTech should maintain the velocity of its product and service development for GCP, as competition in the public cloud and multicloud market is likely to intensify over the coming years.



# TCS



“A comprehensive offering and deep talent reserves make TCS a leader in implementation and integration services for GCP in Europe.”

Mark Purdy

## Overview

TCS is headquartered in Mumbai, India and operates in 55 countries. It has more than 613,900 employees across 300 global offices. In FY22 the company generated \$25.7 billion in revenue, with BFSI as its largest segment. TCS has 24 regional Google Cloud Specializations, including Cloud Migration – Services, Security – Services, IoT – Services, and Application Development – Services. TCS has many clients for its integration and implementation services for GCP in Europe. It also has a large base of certified GCP professionals in the region.

## Strengths

**Comprehensive offering:** TCS offers GCP-related end-to-end services, including assessments of cloud preparedness using Google StratoZone for automatic discovery of existing infrastructure and applications, creation of cloud foundations via TCS Cloud Mason, database migration and modernization services, and TCS Cloud Migration Factory for low-touch migrations (limited or no changes to applications) and high-touch migrations (where applications are migrated to cloud-native GCP versions).

**Sustainability solutions:** TCS makes several sustainability-related investments in GCP, with planned offerings around climate-risk intelligence, carbon offsetting scenario tools, and solutions to help clients manage supplier-sourcing risks in supply chains.

**Deep talent:** TCS continues to grow its GCP talent base through investments in G-Skool, a virtual mentoring school for GCP certifications. TCS has around 30,000 professionals trained in Google Cloud services, with more than 20,000 certifications. It plans to further boost these numbers in 2023.

**Client traction:** TCS offers various implementation and integration services for GCP for clients in Europe. For example, it built IoT systems for a leading train operator in the region to monitor and maintain high-speed train services.

## Caution

Given its increasing involvement in IT projects on GCP that are central to business transformation, TCS should consider increasing the proportion of outcome-based/risk-sharing elements in its overall pricing mix.



# Wipro



“Significant investments in talent and industry solutions, combined with close alignment with Google Cloud in innovation and sales, make Wipro a leader in the implementation and integration services space in Europe.”

Mark Purdy

## Overview

Wipro is headquartered in Bengaluru, India and operates in 66 countries. It has more than 258,700 employees across 167 global offices. In FY22 the company generated \$10.4 billion in revenue, with IT Services as its largest segment. Wipro has six Google Cloud specializations, including Infrastructure – Services, Cloud Migration – Services, and Application Development – Services. Wipro is a Google Cloud Premium Partner. It has a significant client base for its integration and implementation services in Europe. It also has a large base of dedicated GCP professionals in the region.

## Strengths

**Enhanced focus on GCP:** Wipro has restructured its go-to-market model to ensure greater alignment with Google Cloud. The result has been an increased focus on big bets (such as data center exits, data modernization, factory migration and data compliance) and a joint go-to-market approach with Google Cloud to drive awareness, account alignment and collaborative solutions. This new approach should deliver greater benefits for clients through innovative solutions and a significant focus on business transformation efforts.

**New wins:** Wipro has won many new clients for its GCP-related services, including a global automotive giant and major banks and manufacturers in Europe.

**Investment in GCP talent:** In tandem with its new go-to-market model, Wipro has been ramping up its investment in its talent base, with its GCP certifications growing from 797 at the start of 2022 to more than 2,800 by the end of that year.

**Industry solutions:** Wipro has invested in developing a gamut of industry solutions by leveraging Google Cloud. These include Digital Omnichannel bank (a greenfield cloud solution for digital-native banks), cloud-native Cloud Car offering and 5G Edge Telco offering, wherein Wipro works with Google Cloud and telecom companies to increase efficiency, safety and compliance at the edge.

## Caution

Given its increased focus on transformative, big bets with Google Cloud, Wipro should consider increasing the proportion of risk-sharing elements in its overall pricing mix for enterprise clients.



# T-Systems



“The introduction of T-Systems Sovereign Cloud powered by Google Cloud to address data sovereignty issues, combined with its extensive track record with major enterprises in Europe, makes T-Systems a Rising Star in implementation and integration services for GCP in Europe.”

*Mark Purdy*

## Overview

T-Systems, part of Deutsche Telekom, is a major European multicloud and IT service provider. Headquartered in Germany, it operates in more than 20 countries worldwide and had more than 27,000 employees by the end of December 2022. It had annual revenues of around €4.0 billion in 2022. T-Systems has a Google Cloud specialization in Infrastructure – Services. It has a large client base for its integration and implementation services in Europe and a significant cohort of dedicated Google Cloud professionals in the region.

## Strengths

**Sovereign cloud:** Recognizing the importance of digital sovereignty regulations at the EU and national levels, T-Systems has created a sovereign cloud offering, namely T-Systems Sovereign Cloud powered by Google Cloud. This cloud offering is suitable for medium-sensitive data (as covered by Europe’s GDPR requirements, for example) that is subject to data sovereignty rules. The platform includes specific sovereignty controls such as encryption keys for customer data stored by T-Systems outside of Google’s infrastructure, access controls to data, data residency controls (with data stored only in the specific country concerned, for example, Germany), monitoring of the physical security of data centers, and additional threat protection through T-Systems’ Security Operation Center.

**Client traction:** T-Systems helped a major association of public broadcasters in Europe move their content management system from an on-premise legacy system to GCP, with a cloud-native API-first structure, reducing operational costs and ensuring smoother, automated process flows. It helped a European automotive company to build a landing zone for company-wide unified Google Cloud usage with a cloud-native microservices architecture and automated CI/CD pipelines.

## Caution

T-Systems should consider including gain-share and risk-sharing elements in its overall pricing mix. T-Systems Sovereign Cloud powered by Google Cloud is currently suitable for medium-sensitive data. Clients with sensitive data may need extra controls, which T-Systems is currently developing. Clients should take note of future developments.





# Data Analytics and Machine Learning

### Who Should Read This Section

This report is relevant to enterprises across industries in Europe for evaluating data analytics and ML service providers. In this quadrant, ISG highlights the current market positioning of providers in Europe and how they can address the key challenges enterprises face. Our assessment is based on the depth and breadth of the providers' service offerings and market presence.

Customers are investing in data fabric and data democratization concepts that integrate various data assets, enabling cross-collaboration among technical and business users and drastically reducing the time required to manage data. Data governance is another area of interest for customers, and successful implementation of data governance, business glossary and data privacy strategies enables them to monetize data.

Enterprises that focus on MLOps, analytics ops and managed services around operations are becoming more prevalent to support various forms of data consumption. At the same time, data engineering is becoming more challenging due to an increase in data volumes. Hence, automating non-value-added activities in data engineering becomes essential.

Enterprises partner with service providers with deep expertise in data analytics and ML and a top-notch talent ecosystem and delivery ecosystem globally.



**Technology Professional** should read this report to know providers' relative positioning and capabilities to effectively consume Google Cloud data analytics and ML and understand how they are compared in the market.



**Procurement Professional** should read this report to understand the capabilities of Google Cloud data analytics and ML service providers in Europe and understand the competitive edge offered by them.



**Digital Professionals** should read this report to understand the positioning of Google Cloud data analytics and ML service providers and how they can impact clients' ongoing transformation.



Google Cloud Partner Ecosystem  
Data Analytics and Machine Learning

Europe 2023



The quadrant focuses on data analytics and ML (DAML) services for GCP. Providers emphasize their **data migration** capabilities and **accelerators** and develop **industry** and **functional** use cases for clients.

Mark Purdy



## Data Analytics and Machine Learning

### Definition

This quadrant assesses 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 (AR), virtual reality (VR) and extended reality (XR) applications and IoT. The providers should demonstrate foundational capabilities in big data and machine learning on GCP at scale. These capabilities can include using CloudSQL, Cloud Dataproc, BigQuery, Cloud Datalab and Datastore, running and developing solutions/services on the migrated workloads from MySQL, Hadoop, Spark and Hive on GCP, large language models, transformers and autoencoders, Programming By Example (PBE) and Few-Shot Learning (FSL) algorithms.

Capabilities around new data architectures, such as data meshes, are becoming crucial as organizations are moving away from legacy data warehouses and data lakes. In line with industry-leading innovations in the tech ecosystem, such as DALL-E and ChatGPT, leaders in this quadrant are expected to develop a wide range of industry and point solutions using Google Cloud's DAML features. Some of these solutions include use cases for computer vision and their combinations with conversational AI.

### Eligibility Criteria

1. Scope and use of relevant **tools and technologies**
2. Integration and innovation of holistic **DAML services and solutions**
3. Availability of practices and programs to upgrade skills and **boost customer success** (for example, consulting or best practice frameworks, ROI identification and business case development)
4. Availability, experience and certifications of resources and competencies in the **GCP DAML-related tech stacks**
5. Availability of **GCP-focused offerings, roadmaps and innovations** (current and planned)
6. Number and reputation of case studies and client examples about **DAML services and solutions** on GCP
7. A point of view around recent developments in machine learning, such as **large language models**
8. Strong focus and expertise in a broad range of GCP's AI-driven tools to help enterprises move away from **conventional data management practices and management frameworks**
9. Focus on building **industry-based solutions** to resolve industry-specific business problems



## Data Analytics and Machine Learning

### Observations

DAML on GCP represents one of the fastest and most intensely competitive parts of the Google ecosystem in Europe, as enterprises seek to gain greater insights and competitive advantage from their data. ISG sees several important trends in this arena. First, there has been a surge in demand for data migration and modernization services, as enterprises seek to marshal data from organizational siloes and legacy databases on more modern, BigQuery-enabled data platforms. Providers are helping enterprises explore new data architectures, moving from old-fashioned data lakes to AI-enabled data meshes and fabrics. Better data governance is seen as a prerequisite for firms' citizen AI and data democratization initiatives and critical to developing new AI use cases and industry applications. Second, and relatedly, providers are investing significantly in data migration tools to move existing databases—Databricks, Snowflake or Teradata, for instance—to GCP securely and rapidly. Third, providers are crafting new vertical-specific solutions using GCP-native tools in areas such

as trade controls, consumer marketing and supply chains. Fourth, providers are integrating other elements of next-generation technologies into their DAML offerings, for example, by connecting data from IoT devices (such as in transport fleets or factories) to power digital twins or industrial metaverse applications. Fifth, most leading providers are looking to integrate large language or generative AI technologies into their DAML offerings for GCP. Some are launch partners for Google Bard, although enterprise applications of generative AI are still at an embryonic stage.

From the 37 companies assessed for this study, 25 have qualified for this quadrant with eight being Leaders and one Rising Star.

### accenture

**Accenture** has invested in developing a vast repertoire of data migration, data modernization and AI tools and solutions for GCP. It has developed many industry and functional AI solutions using Google Cloud AI technologies, for example, in intelligent supply chains.

### cognizant

**Cognizant** has developed a comprehensive offering of data modernization and ML services on GCP, and has recently seen significant growth among large enterprises in Europe for its DAML services.

### GFT

**GFT** has invested significantly in building a new range of data migration accelerators to help clients migrate faster to the GCP. In April 2023, GFT completed the acquisition of Targens, a Germany-based company specializing in banking, compliance and digital innovation.

### HCLTech

**HCLTech** has invested in developing a passel of data analytics and ML (DAML) point and vertical solutions for GCP. It also has experience in implementing data migration and machine learning solutions using Google Cloud technologies for enterprises in Europe.

### Infosys®

**Infosys** has developed a range of generative-AI services and solutions on GCP. It has significant experience using Google Cloud technologies to implement DAML solutions for major enterprises in Europe and globally.

### Quantiphi

**Quantiphi** continues to expand its already extensive portfolio of AI solutions for GCP. It has increased its market presence in Europe by creating a dedicated sales force and appointing a senior European technology leader to its board. It has also acquired Accreon, a healthcare technology company based in Canada.



## Data Analytics and Machine Learning



**TCS** offers a broad array of data migration, analytics and ML services for GCP. It has developed a range of AI-powered functional and industry solutions and has extensive experience in delivering complex, large-enterprise projects in this space.



**Tech Mahindra** is a seasoned practitioner of data migration and modernization for GCP, offering a raft of solutions and accelerators in this space. It recently expanded its global innovation network by establishing a Telco Smart Analytics Lab dedicated to Google Cloud in Milton Keynes, U.K.



**Wipro** invests significantly in data lake migration and modernization services for GCP. It works collaboratively with Google Cloud on new generative AI-based industry solutions. It also recently achieved the Data Analytics specialization from Google Cloud.

### Ancoris

**Ancoris** continues to emphasize its persona-based approach to DAML solutions and services for GCP. It has invested in leadership positions, talent development and technical delivery capabilities, bolstering its growth prospects over the coming months.



# Accenture



“Strong data migration and modernization tools and assets, along with significant expertise in industry and functional applications of ML, make Accenture a leader in data analytics and ML services for GCP in Europe.”

Mark Purdy

## Overview

Accenture is headquartered in Dublin, Ireland and operates in 49 countries. It has more than 738,000 employees across 200 global offices. In FY22 the company generated \$61.6 billion in revenue, with Consulting as its largest segment. Accenture has nine Google Cloud specializations, including Data Analytics, ML and Marketing Analytics. It has won the Google Cloud Partner award 14 times. It has also received the 2021 Global Google Cloud Services Partner of the Year award. Accenture has a large client base for its DAML services for GCP in Europe and many practitioners in the region.

## Strengths

### Data migration and modernization:

Accenture is a seasoned data migration and modernization specialist, bringing a vast arsenal of assets and tools to accelerate data migrations to GCP. These include tools for Hadoop to GCP migrations, Hadoop to Databricks on GCP, Snowflake on GCP, Teradata to GCP and a Smart Data Warehouse Mover. These are underpinned by its Secure Data Foundation framework, incorporating ingestion, data security and governance methods for creating greenfield data platforms.

**AI expertise:** Accenture offers solutions across the main GCP AI tools, including Vertex AI for training ML models, Google Contact Center AI and Google Document AI for intelligent document processing. It also

offers a variety of industry and functional solutions, including customer engagement, marketing, talent and skilling, pricing, and supply chain and operations.

**Client traction:** Accenture created an AI-powered data platform for a major grocery chain to provide real-time visibility into the supply chain of fresh produce from farm to fork, with recommended actions for supply chain teams and predictive alerts to spot and pre-empt emerging supply chain bottlenecks. The platform enabled the client to differentiate its produce on freshness while achieving reductions in inventory and cost to serve.

## Caution

Accenture should more actively showcase its DAML solutions and client credentials to enterprises in Europe. The company should also consider featuring more solutions using generative AI for GCP.





“A comprehensive offering, combined with deep experience in data migration and modernization, make Cognizant a leader in the DAML space in Europe.”

Mark Purdy

# Cognizant

## Overview

Cognizant is headquartered in New Jersey, U.S. and operates in 42 countries. It has more than 355,300 employees across 162 global offices. In FY22 the company generated \$19.4 billion in revenue, with Financial Services as its largest segment. Cognizant has four Google Cloud Specializations, including Data Management – Services and Data Analytics Services. Cognizant has a significant client base for its DAML services in Europe and a substantial cohort of professionals in the region. It won a Google Data Partner of the Year award in 2021, and was data partner of the year for Benelux in 2022.

## Strengths

**Comprehensive offering:** Cognizant offers a full spectrum of data modernization and analytics services, including migration of legacy data to modern data architectures on GCP, automated dataOps to drive faster data products, ML model creation and deployment, migration and modernization of BI infrastructure and platforms, and industry and domain solutions in areas such as contact center AI and intelligent document processing.

**ESG focus:** Cognizant has developed an array of data-driven tools and solutions in the ESG space, for example various ESG reporting and data management platforms, frameworks for sustainable manufacturing data and insights, and sustainable supply chain tools for ESG due diligence and supply chain transparency.

**Key wins:** Cognizant has seen significant growth in the DAML space, with several key wins recently in Europe. For a large online retailer in Europe, Cognizant worked with the client to build a modern data foundation for hyper personalized marketing, delivering a 17% increase in the customer base and a 30% reduction in the total cost of ownership for the platform. It has also implemented a Dialogflow CX solution for a large global bank with a strong Europe presence, cutting service times by 35% and generating a 35% reduction in TCO.

## Caution

Cognizant should provide greater clarity on how the Servian and Contino acquisitions play into its overall service development in the DAML space.





“Deep expertise in GCP and new data migration accelerators make GFT a strong choice for data analytics and ML services in Europe.”

Mark Purdy

# GFT

## Overview

Founded in 1987, GFT is a digital technology and IT services company operating in 16 countries in Europe, Asia and the Americas. Headquartered in Stuttgart, it has more than 10,000 employees worldwide. GFT holds a specialization in Application Development, with another five, including Data Analytics and Security, in progress for 2023. In 2019, it was the Google Cloud Breakthrough Partner of the Year for EMEA. GFT's DAML services are growing in Europe, with a significant base of analytics and ML experts.

## Strengths

**Targens acquisition:** In April 2023, GFT completed the acquisition of Targens, a Germany-based company with expertise in banking, compliance (especially combatting financial crime) and digital innovation. The acquisition also brings expertise in regulation, bank control, data architectures, AI and distributed ledger technologies.

**Depth of talent:** Globally, GFT has over 1,200 experienced GCP consultants with more than 500 certifications, working on more than 140 active GCP projects. It plans to further expand certifications in 2023, continuing to invest in new GCP talent through GFT Cloud Academy and Learn to Fly program; the latter gives new professional hands-on experience in production-ready environments.

**All-new accelerators:** Over the last year, GFT has heavily emphasized helping enterprises accelerate data migrations to the cloud, investing in several proprietary accelerators. These include its Google Cloud and Snowflake Migration Accelerator to help enterprises accelerate migrations from on-premises systems to Snowflake on GCP; a Google Cloud Data Zone Migration Tool, which moves data from on-premises to GCP while encrypting and decrypting the data; and a Google Cloud Data Zone Data Science Workbench, which allows enterprises to get faster analytics on their ingested data using a Jupyter environment.

## Caution

GFT's industry expertise is heavily concentrated in two areas—financial services (especially in the U.K.) and manufacturing (U.S., Spain and Germany). Hence, prospective clients in other industries with specific needs may need to consider this. Clients should also monitor how the acquisition of Targens is integrated into GFT's overall offerings (especially in financial services).



# HCLTech



“A large talent base, combined with a broad array of vertical and domain solutions, make HCLTech a leader in the DAML space in Europe.”

Mark Purdy

## Overview

HCLTech is headquartered in Noida, India and operates in 60 countries. It has more than 222,200 employees across over 215 delivery centers worldwide. In FY22 the company generated \$11.48 billion in revenue, with IT and Business Services as its largest segment. HCLTech has five Google Cloud specializations, including Data Analytics – Services and ML – Services. In 2021 it won the Breakthrough Partner of the Year award. HCLTech has a significant client base for its GCP-related DAML services in Europe and a substantial number of dedicated resources in the region.

## Strengths

**Vertical solutions:** HCLTech offers a raft of point and vertical DAML solutions using Google-native data and ML services. Examples include HCLTech Sketch, an end-to-end tool for developing data pipelines for migration; HCLTech Gatekeeper for automated data generation, reconciliation, process testing and declarative code testing; Allab, an end-to-end platform for building AI use cases; and RAI framework that uses evidence packs and explainability dashboards to help identify and mitigate AI risks and bias, in the area of ethical AI. HCLTech also offers more industry-focused solutions in areas such as medtech and trade controls and surveillance.

**Deep talent:** HCLTech has considerable expertise in implementing data analytics and ML on GCP. It has many GCP-certified engineers, Google professional ML engineers and Google data engineers in Europe.

**Commercial flexibility:** HCLTech’s range of commercial models for its DAML services is notable. It offers its services based on outcome-based and risk-sharing pricing models.

**Client traction:** HCLTech has undertaken DAML projects for several large enterprises in Europe, including Hadoop data migration to BigQuery and the creation of an ESG platform for a large European bank.

## Caution

HCLTech should elaborate a stronger point of view around the future impact of generative AI in the DAML space. It should showcase more of its DAML client success stories in Europe to move further into the leader territory.





“A range of point solutions and extensive experience in serving major enterprises make Infosys a good choice in the DAML services market in Europe.”

Mark Purdy

# Infosys

## Overview

Infosys is headquartered in Bengaluru, India and operates in 54 countries. It has more than 346,800 employees across 247 global offices. In FY22 the company generated \$16.3 billion in revenue, with Financial Services as its largest segment. It has four Google specializations, including Data Analytics – Services. Infosys has an extensive DAML practice across all major hyperscalers and data platforms and a significant client base for its DAML solutions and services in Europe.

## Strengths

**Focus on generative AI:** Infosys has moved rapidly toward the large-language model space, offering generative-AI strategy and advisory services; a Gen-AI foundry; frameworks around trust, privacy and compliance; and customized large-language models and use cases. Specific solutions include a starter kit for cognitive AI, Cognitive Content Analysis Studio, Responsible AI framework, and document summary and insights capability.

**Point solutions:** Infosys is notable for its point DAML solutions powered by Google Cloud technologies. Its Sentient Live Marketing solution, for example, constructs knowledge graphs from consumers’ online browsing patterns, providing insights to help retailers improve the efficiency of their

marketing spend. Its Connected Value Chain for GCP and retail connects data from various point-of-sale systems and third-party data sources to help enterprises improve supply chain efficiency.

**Client traction:** Infosys has extensive experience implementing DAML solutions for major enterprises in Europe and beyond. For a major European telecoms provider, it implemented a deep learning solution on GCP, increasing customer conversion rates by up to 20 percent with accuracy above 98 percent.

## Caution

Infosys’ generative AI service offering is an important first step toward enterprise solutions in this space. However, given the frenetic pace of innovation in transformer models, Infosys will likely need to accelerate the velocity of its product development and vertical solutions to stay competitive in this space.





“With a comprehensive portfolio of AI solutions backed by deep AI-first digital engineering skills, Quantiphi strengthens its position as a leader in the data analytics and ML space in Europe.”

Mark Purdy

# Quantiphi

## Overview

Founded in 2013, Quantiphi is an AI-first digital engineering services company based in Massachusetts, U.S. It has more than 4,000 employees and over 300 customers globally. It has been a Google Premier Partner since 2016 and has 11 Google Cloud specializations, including Infrastructure, ML, Marketing Analytics, Data Analytics and Contact Center AI. Within Europe, it has a strong focus on financial services, healthcare and life sciences, and retail and manufacturing industries. Quantiphi has a substantial client base and many professionals for its data analytics and ML services in Europe. In its six years of partnership with Google Cloud, Quantiphi has won six Google Cloud partner of the year awards. In 2020, Quantiphi received the Google Cloud Specialization Partner of the Year – Data and Analytics award.

## Strengths

**Comprehensive portfolio:** With deep expertise in AI and digital engineering, Quantiphi has built a wide portfolio of AI solutions encompassing many different applications. These include knowledge and discovery (for example, generative AI), automation (for example, document AI and MLOps), experience (for example, digital avatars and conversational AI), and simulation (for example, digital twins and industrial metaverse). These solutions are backed by complementary skills and assets in data, platform and application modernization.

**Increased focus on Europe:** Quantiphi has strengthened its presence in Europe by creating a dedicated sales force and bringing an established technology leader on board.

**Adjusted pricing:** To provide greater commercial flexibility to clients, Quantiphi has developed more output- and outcome-based pricing packages in areas such as document processing and conversational AI.

**Acquisitions and alliances:** In 2022, Quantiphi acquired Accreon, a Canada-based healthcare technology company with expertise in healthcare data management, interoperability between healthcare player systems and electronic medical records (EMR). Quantiphi has also formed an alliance with Databricks to bring Quantiphi’s engineering expertise to Databricks’ Lakehouse platform for data engineering and analytics solutions.

## Caution

With its new strategic sales focus on Europe, Quantiphi should consider showcasing more client credentials and success stories in the region. It could also consider more targeted thought leadership initiatives to help European enterprises and decision-makers grasp the implications of new AI developments.



# TCS



“With a comprehensive offering, extensive client experience, and a wide array of functional and industry tools, TCS is a leader in the DAML services space in Europe.”

Mark Purdy

## Overview

TCS is headquartered in Mumbai, India and operates in 55 countries. It has more than 613,900 employees across 300 global offices. In FY22 the company generated \$25.7 billion in revenue, with BFSI as its largest segment. TCS has 24 regional Google Cloud specializations, including Data Analytics – Services, Data Management – Services, ML – Services, and Marketing Analytics – Services. TCS has a significant client base for its DAML services in Europe. It also has a large base of DAML professionals in the region.

## Strengths

**Comprehensive offering:** TCS offers a broad spectrum of services across the DAML space. These include database migration and modernization services for GCP; smart analytics, including data warehouse modernization, data lake modernization, BI services, data analytics and ML; and cloud-based AI services in areas such as CX transformation and intelligent operations.

**ESG solutions:** TCS provides several ESG solutions, including the DAEzMo™ for reporting and data management, Clever Energy™ for managing energy-related systems and assets, and DigiFleet™ for providing situational and context insights in supply chains and fleet management operations.

**Client traction:** TCS has an extensive track record of implementing DAML solutions for blue-chip enterprises in Europe and globally. For a media and telecoms company in the U.K., it helped migrate 18 applications from on-premises Hadoop clusters to GCP, resulting in faster query performance, 99 percent availability and a one-third reduction in the total cost of ownership. For a U.K. automotive company, TCS built a modern data platform powered by Google Cloud, creating a real-time production dashboard with connected car data analytics. Manual reporting was reduced by 80–85 percent, delivering cost savings of up to 35 percent.

## Caution

Given its foray into more transformational industry and functional solutions in the DAML space, TCS should consider incorporating more outcome-based/risk-sharing options in its overall pricing mix. It should also consider offering more solutions based on generative AI.





“As a seasoned practitioner of data migrations and modernizations on GCP, Tech Mahindra is a leader in DAML services for Google Cloud in Europe.”

Mark Purdy

# Tech Mahindra

## Overview

Tech Mahindra is headquartered in Pune, India and operates in 90 countries. It has more than 157,000 employees across 171 global offices. In FY22 the company generated \$5.9 billion in revenue, with IT services as its largest segment. Tech Mahindra has a Google Cloud specialization in Data Analytics – Services. It has a substantial client base for its DAML services on Google Cloud in Europe. It also has a significant number of FTEs in the region. It recently expanded its global innovation network by establishing a Telco Analytics Lab dedicated to Google Cloud in Milton Keynes, U.K.

## Strengths

**Client traction:** Tech Mahindra has significant experience implementing data modernizations for large, complex enterprises. For example, it created a common data platform powered by Google Cloud for a major European telecom provider and a data monetization platform for an iconic European communications company.

**Global innovation network:** Tech Mahindra’s clients can benefit from its extensive global innovation network, with a co-creation lab in Munich, Germany, and a recently opened Telco Smart Analytics Lab dedicated to Google Cloud in Milton Keynes, U.K.

**Data modernization:** Tech Mahindra is a seasoned practitioner of data modernizations on GCP, with experience in a wide range of migrations—Teradata, Hadoop and AWS Redshift to BigQuery—and in analytics solutions such as Looker and BigQuery. It also offers numerous accelerators for data migration and modernization through its Cloud Blazetech platform, with modules for data architecture and consulting, data engineering, cloud data platforms, data fabric and data mesh designs, data observability and hybrid/multicloud data orchestration.

## Caution

Tech Mahindra’s DAML capabilities are slightly skewed toward data migration and modernization. To move further in the Leader quadrant, it should increase the velocity of ML solution development, considering new developments such as generative AI.



# Wipro



“With a comprehensive offering, deep client experience and a track record of co-innovation with Google Cloud, Wipro has emerged as a leader in the DAML space in Europe.”

Mark Purdy

## Overview

Wipro is headquartered in Bengaluru, India and operates in 66 countries. It has more than 258,700 employees across 167 global offices. In FY22 the company generated \$10.4 billion in revenue, with IT Services as its largest segment. Wipro has six Google Cloud specializations, including Data Center Modernization—Services and Data Analytics—Services. It has a significant client base for its DAML services in Europe. It also has a large number of dedicated DAML professionals in the region.

## Strengths

**Comprehensive offering:** Wipro has developed an extensive range of DAML solutions, including migration of on-premises data estates, data warehouses and databases to GCP; integration with BigQuery; migration of business intelligence estates to Looker, and intelligent contact center using Google AI services. Going forward, it plans new offerings on Google Cortex (a framework for modernizing data estates on GCP) and on data lakehouse using Big Lake (a storage engine that enables fine-grained control of data and analysis through Google BigQuery and various open-source tools).

**New specialization:** Wipro has recently achieved the Google Data Analytics specialization, indicating its strong focus on GCP.

**Co-development initiatives:** Wipro works closely with Google Cloud and client enterprises to co-develop industry solutions. It also collaborates with Google Cloud on large-language model custom training and optimization and develops industry solutions using Google Bard, for example, to automate complex workflows in areas such as investment banking.

**Client traction:** For a major client in the U.K. and Ireland, Wipro helped move the analytics and ML applications (built using proprietary software) to GCP, reducing licensing costs and simplifying contract management.

## Caution

Many of Wipro’s collaborative efforts on generative AI solutions are, by nature, still at an early stage. Enterprise clients should monitor to what extent these are converted into enterprise-ready solutions.





“Ancoris’ persona-based approach and extensive client traction in solution development make it a Rising Star in the DAML services space in Europe.”

Mark Purdy

# Ancoris

## Overview

Ancoris is a Google pure-play digital technology and services company headquartered in the U.K. It provides end-to-end services on Google Cloud, including cloud implementation and managed services, workspace solutions, and DAML services. Ancoris has more than 100 employees globally. It has been a partner of Google Cloud for 15 years and is one of the three strategic enterprise partners for Google Cloud in the U.K. It has three specializations, including Data Analytics Services. Ancoris has more than 400 customers globally, with a large proportion in the U.K.

## Strengths

**C-suite decision-making:** One of Ancoris’ differentiators is its focus on using DAML tools to help C-suite executives make better decisions. To this end, It offers five persona-based labs. For example, the Ancoris GreenLab provides insights to CIOs and sustainability leaders on the carbon footprint of on-premises and hosted data center deployments.

**Client traction:** Ancoris has a large client base for its DAML services, especially in the U.K. and beyond. For a major healthcare provider, it built a data warehouse with a single patient view integrated with Google BigQuery. For a major household goods manufacturer, it created a data warehouse powered by Google Cloud with data visualization capabilities and executive

insights provided by Looker Studio. It has also created geo-location-based services (using Google Maps APIs) for a global food delivery company and for a leading U.K. insurance provider.

**Key investments:** Ancoris has been strengthening its management and investment capabilities over the last 24 months, creating new senior-level posts and bolstering its delivery capabilities and ability to retain and scale talent. These measures should provide a strong foundation for enhanced solution development and continued growth.

## Caution

Ancoris should continue the pace of its product and service development, as new developments such as generative AI are likely to create significant disruption in the DAML space over the next few years. Ancoris should also consider introducing gain-share, risk-share and outcome-based pricing options into its commercial models.





# Managed Services

### Who Should Read This Section

This report is relevant to enterprises across industries in Europe for evaluating providers of Google Cloud managed services. In this quadrant, ISG highlights the current market positioning of these providers in Europe and how they address the critical challenges associated with offering managed services in the Google Cloud ecosystem. ISG's assessment is based on the depth and breadth of the providers' service offerings and market presence.

Enterprises embrace cloud adoption to achieve better accessibility and effectiveness, flexibility to streamline operations and management, and instill agility and responsiveness. Enterprises and service providers consider intelligent cloud operations and reliability engineering as top priorities. Along with these, the multicloud adoption driven by Google Anthos drives platform efficiency and risk management.

Another area of concern for enterprises is security. Enterprises seek strategic advice from trusted partners, including security posture management and ongoing security operations.



**Technology Professionals** should read this report to understand providers' relative positioning and capabilities to effectively consume Google Cloud managed services and how they are compared in the market.



**Procurement professionals** should read this report to understand the capabilities of Google Cloud managed service providers in Europe and learn how they compare with each other.



**Digital Professionals** should read this report to understand the positioning of Google cloud managed service providers and how they can impact clients' ongoing transformation.



**Google Cloud Partner Ecosystem  
Managed Services**

Europe 2023



This quadrant assesses service providers that offer **managed services for GCP**. Service providers increasingly emphasize GCP as part of a **multicloud** or hybrid managed service offering, with a strong focus on **FinOps**.

Mark Purdy



## Managed Services

### Definition

The quadrant assesses managed public cloud service providers offering professional and managed services to augment Google's built-in capabilities, including IaaS and PaaS. The professional and managed services include orchestration, provisioning, real-time and predictive analytics, and monitoring and managing a customer's public cloud and multicloud environments. The goal is to maximize the performance of enterprise cloud workloads, reduce costs and ensure compliance and security. Service providers typically offer significant levels of automation and transparency over the managed cloud resource pool to customers using specially developed or licensed cloud management platforms and tools. SLAs for managed services normally encompass a wide range of services to drive business value, such as data management and governance, machine learning capabilities, and ESG and sustainability

tools and assets. Managed service providers also have teams well-versed in GCP-native skills such as cloud-native operations, site reliability engineering (SRE) and platform reliability engineering (PRE). The maturity of managed services offerings for GCP can also include usage and impact of innovative IPs and tools and service delivery frameworks. These include cloud FinOps, automation tools to improve service availability and resilience, cloud and data security, regulatory compliance and governance tools.

### Eligibility Criteria

1. Experience in **designing, building and managing public and multicloud environments** with a focus on the Google Cloud Platform
2. Supporting the development of **software code, cloud-native architectures** and legacy system integration
3. Experience in **implementing both Agile and DevOps** and integrating with clients' existing processes
4. Experience in **API automation and cloud analytics**
5. Possess well-developed **security practices** and capabilities
6. Strength of the provider's partnership with Google Cloud, measured by the number and category of **relevant certifications**, duration of its relationship with Google Cloud and evidence of strategic cooperation between the provider and Google Cloud
7. Proven use cases or proofs of concept (PoCs) in **healthcare, sustainability, banking, financial services and insurance (BFSI)** and other industry verticals



## Managed Services

### Observations

The managed services space for GCP continues to grow in scale and scope, often in a multicloud management or even serverless context. Cloud 2.0 is a topic of discussion among leading providers; the cloud is evolving beyond a cost reduction driver and becoming a key pillar of business innovation and strategy. In this context, traditional managed service features—patching, SLAs and security—are necessary but not sufficient conditions for competitive differentiation among providers, with enterprises now looking for advanced capabilities in areas such as intelligent automation, sustainability and industry-inflected cloud solutions. Several trends in the managed services space for GCP are now emerging. First, many leaders now offer a unified environment to manage hybrid and multicloud deployments, with different as-a-service layers across infrastructure, platforms and functions. Second, with cloud spending now becoming a major pre-occupation for enterprises, several leading providers heavily emphasize their FinOps offerings,

encompassing elements such as cloud automation, multicloud dashboards, granular cloud usage reporting, cloud sizing and various decision tools to optimize cloud capacity allocation across departments and teams. Third, data sovereignty—regulations covering the location and usage of data within defined geographic borders—is a major concern for many enterprises in Europe. More providers are now responding with managed sovereign cloud offerings, which provide additional safeguards and access controls around sensitive data. Given the growing focus of the EU on AI regulation in Europe, it seems likely that demand for sovereign cloud solutions will only increase over the next several years.

From the 32 companies assessed for this study, 20 have qualified for this quadrant with six being Leaders and one Rising Star.

### accenture

**Accenture's** large global Google Business Group offers managed services for GCP with a strong focus on industry solutions, sustainability, and security and compliance.

### HCLTech

**HCLTech** brings its expertise in automation and IT processes to its managed services for GCP. It has recently added three Google Cloud delivery centers in Romania, Poland and Canada.

### Infosys

**Infosys** offers an extensive set of managed services for GCP, with a particular emphasis on FinOps maturity models to help clients optimize their cloud spend across different teams and units. Infosys is also notable for its deep expertise and provision of solutions for API management via Apigee.

### TCS

**TCS** has invested in accelerators for GCP, notably its Cloud Lab on Google Cloud, an immersive and experimental setting where clients can develop and test solutions on GCP. It also continues to grow its already extensive cadre of GCP-trained and certified professionals.

### T Systems

**T-Systems** continues to invest in its Sovereign Controls (powered by GCP) offering, focusing on helping European enterprises meet data residency and other digital sovereignty requirements on GCP.



**Wipro** offers a comprehensive range of managed services for GCP, incorporating hybrid, multicloud and cloud-native elements. It has invested in ramping up its Google Cloud talent base and has developed extensive expertise in GCP-related technologies.

### TECH mahindra

**Tech Mahindra**, a Rising Star in Europe, offers a well-curated set of managed services for GCP in the region, with a notable emphasis on security and compliance services.





“With a wide variety of industry-inflected solutions and a strong focus on sustainability, security and compliance, Accenture is a leader in end-to-end managed services for GCP in Europe.”

Mark Purdy

# Accenture

## Overview

Accenture is headquartered in Dublin, Ireland and operates in 49 countries. It has more than 738,000 employees across 200 global offices. In FY22 the company generated \$61.6 billion in revenue, with Consulting as its largest segment. Accenture has nine Google Cloud specializations, including Infrastructure, Application Development and Security. It is a 14-time Google Partner award winner. It has also won the 2021 Global Google Cloud Services Partner of the Year award. Accenture has a large client base for its managed services for GCP in Europe and a significant cohort of GCP practitioners in the region.

## Strengths

**Security emphasis:** For all of its hyperscaler services, Accenture strongly emphasizes managing cloud security risks and compliance, incorporating standardized and repeatable frameworks with a high degree of built-in automation. For GCP, its offerings include Secure Cloud Express (five-day assessment to detect misconfigurations), Secure Cloud Foundation (IAC code and templates for cloud-native security), Secure Cloud Governance Library (pre-built, actionable policies), and a cloud-enabled managed threat detection-as-a-service.

### Industry and functional solutions:

Accenture has developed various industry and functional offerings for GCP. In retail, for example, it offers solutions such as retail supply chain, shelf stock monitoring,

planogram analysis and last-mile delivery, with further offerings in the pipeline for the second half of 2023. Its customer offering includes modules for digital marketing, customer privacy and digital omnichannel platforms powered by Google Cloud.

**Focus on sustainability:** Accenture stands out for its intense focus on sustainability by and on the cloud. Its GCP Green IT Acceleration offering aims to help clients optimize their carbon emissions, starting with migration to cloud operations, using a mix of GCP tools and Accenture tools such as Intelligent Cloud Resource Optimizer.

## Caution

Accenture should more actively showcase its distinct managed service offerings for GCP, especially for enterprises in Europe. Its pricing tends to be at the premium level for very large enterprises, which may make its managed services less accessible to mid-tier organizations.





“A comprehensive offering and consulting and automation capabilities make HCLTech a good choice for managed services for GCP in Europe.”

Mark Purdy

# HCLTech

## Overview

HCLTech is headquartered in Noida, India and operates in 60 countries. It has more than 222,200 employees across over 215 delivery centers worldwide. In FY22 the company generated \$11.48 billion in revenue, with IT and Business Services as its largest segment. HCLTech has five Google Cloud specializations, including Infrastructure – Services. In 2021, it won the Breakthrough Partner of the Year award. HCLTech has a significant client base for its managed services for GCP in Europe and has a substantial number of dedicated resources in the region.

## Strengths

**Comprehensive offering:** HCLTech is a Google Cloud Managed Service Partner (in nine countries) and provides a host of services deploying, running and managing Google Cloud environments, including round-the-clock support, SRE-based cloud operations, AIOps tools and frameworks, cloud FinOps, and security and compliance management.

**Consulting solutions:** To help enterprises define their cloud strategy, HCLTech offers consulting services in areas such as cloud assessment, migration planning, operational transformation, and security and compliance. It also offers more than 70 assets and accelerators for GCP.

## Automation capabilities:

HCLTech’s ElasticOps provides several AI-powered automation tools to streamline cloud operations on GCP (and other public clouds). These include its DRYICE™ iAutomate runbook automation tool, which automates parts of the IT operations lifecycle, and MyXalytics, which provides a single pane of glass for IT operations on GCP.

**Client traction:** HCLTech has delivered GCP-related services for leading enterprises in Europe. For example, it offered a platform to ensure regulatory compliance and fraud detection for a major European bank, with a 30 percent reduction in false positives and a 60 percent reduction in costs using AI-powered KYC processes.

## Caution

The market for managed services for GCP is becoming more competitive. Hence, HCLTech should ensure its managed services portfolio keeps pace with market developments. It should also seek to expand its base of managed services clients in Europe and showcase more of its credentials.



# Infosys



“A comprehensive offering, combined with notable expertise in FinOps, makes Infosys a good choice for managed services for GCP in Europe.”

Mark Purdy

## Overview

Infosys is headquartered in Bengaluru, India and operates in 54 countries. It has more than 346,800 employees across 247 global offices. In FY22 the company generated \$16.3 billion in revenue, with Financial Services as its largest segment. It has four Google Cloud specializations, including Infrastructure—Services and Application Development—Services. Infosys was the 2021 Specialization Partner of the Year for Cloud Migration. It has a significant client base for its managed services for GCP in Europe.

## Strengths

**Comprehensive offering:** Infosys offers a range of services, covering nearly every aspect of modern cloud management, from cloud network services to containers, from IaaS to PaaS, and from security services to FinOps. These are available on GCP and hybrid or multicloud environments.

**Apigee apotheosis:** Infosys is notable for its deep expertise and offerings around Apigee API management, including Apigee Edge, X, Hybrid and Sense offerings. It has a large cohort of trained Apigee professionals globally and has specific expertise in areas such as API governance and CoE setups, Apigee sizing and licensing, and Apigee implementation and operations.

**FinOps expertise:** Recognizing the increasing enterprise focus on enterprise cloud costs, Infosys has invested in developing a comprehensive maturity model for FinOps, with granular cost allocation across teams, insights into cost drivers, benchmarking against internal teams and industry yardsticks, tools for real-time decision-making, and various prediction, pricing and optimization features. Clients can choose three tiers of FinOps services, providing increasing gradations of granularity into cloud spending drivers on GCP and other hyperscaler platforms.

## Caution

Infosys should seek to showcase more of its managed service client credentials and success stories, especially in Europe. It should also demonstrate how it integrates sustainability principles and solutions into its managed services for GCP.





“A comprehensive multi-layered offering and a host of industry solutions make TCS a leader in managed services for GCP in Europe.”

Mark Purdy

# TCS

## Overview

TCS is headquartered in Mumbai, India and operates in 55 countries. It has more than 613,900 employees across 300 global offices. In FY22 the company generated \$25.7 billion in revenue, with BFSI as its largest segment. TCS has 24 regional Google Cloud specializations, including Infrastructure—Services, Data Management—Services, and Security—Services. TCS has a significant client base for its managed services for GCP in Europe. It also has a large number of certified GCP professionals in the region.

## Strengths

**Industry solutions:** TCS has invested in a variety of industry solutions for GCP, which include TCS BaNCS™ for creating microservices architectures for banking clients, TCS OmniStore™ for orchestration of multi-channel customer environments in retail, and TCS WaferWise™ for detecting wafer anomalies in semiconductor manufacturing.

**Wide range of accelerators:** TCS offers several accelerators, such as TCS Cloud Lab on Google Cloud, which provides an immersive experimental environment where enterprises can develop and test new solutions on GCP. It also offers TCS Cloudonomy™, a digital simulation and visualization platform to help clients plan their cloud journey.

## Comprehensive offering:

TCS' Cloud Exponence offers a unified, multi-layered approach to managing hybrid and multicloud environments, including GCP. It offers a single interface for managing cloud environments from different hyperscalers, common pricing and billing, and a unified service catalog for different cloud providers. Enterprises can choose between four different layers: infrastructure-as-a-service (management of GCP virtual machines, network resources, etc.); platform-as-a-service (PaaS service requests only); and additional services requested by the customer such as FinOps or vulnerability management and endpoint protection.

## Caution

TCS should showcase more of its client credentials and success stories for managed services in Europe. It should also consider integrating more outcome-based/risk-sharing options into its overall pricing mix.





“With its Sovereign Cloud offering, consulting experience and extensive client experience, T-Systems is emerging as a leader in managed services for GCP in Europe.”

Mark Purdy

# T-Systems

## Overview

T-Systems, part of Deutsche Telekom, is a major European IT service provider and multicloud service provider. Headquartered in Germany, it operates in more than 20 countries worldwide and had more than 27,000 employees by the end of December 2022. It generated annual revenues of around €4.0 billion in 2022. T-Systems has Google Cloud specialization in Infrastructure—Services and is a Google Cloud Premier Partner. It has a large client base for its managed services in Europe and a significant number of dedicated GCP professionals in the region.

## Strengths

**Consulting support:** T-Systems provides two different types of consulting for managed services. First, it offers advisory services to help clients assess and use GCP, including concept development for minimum viable landing zones. Second, it provides support for the early-stage development of vertical or horizontal solutions and use cases for GCP.

**Client traction:** For a leading AI language translation company in Germany, T-Systems uses Sovereign Controls to help the company meet data sovereignty requirements (for example, keeping data in Germany) while enabling access to the Google Cloud–native functionality. T-Systems also provides Sovereign Controls for leading enterprises in healthcare management, e-mobility and broadcasting.

**Platform flexibility:** For low-sensitive data, T-Systems offers managed services for GCP, either as a managed foundation or as an individual landing zone. It offers a Sovereign Cloud powered by Google Cloud for more sensitive data. This sovereign cloud insulates client data within geographic borders and ensures access entitlements, cryptographic keys and other sensitive elements are invisible to Google Cloud. T-Systems also plans to extend the offering to include sovereign clouds for highly sensitive data.

## Caution

The T-Systems Sovereign Cloud powered by Google Cloud is currently suitable for medium-sensitive data that needs to be compliant with GDPR. T-Systems should accelerate its plans for more advanced services to meet data sovereignty requirements for highly sensitive data regimes.





“A comprehensive offering, deep expertise in Google Cloud-related technologies and an extensive partner ecosystem make Wipro a strong choice for managed services for GCP.”

Mark Purdy

# Wipro

## Overview

Wipro is headquartered in Bengaluru, India and operates in 66 countries. It has more than 258,700 employees across 167 global offices. In FY22 the company generated \$10.4 billion in revenue, with IT Services as its largest segment. Wipro has six Google Cloud specializations, including Infrastructure—Services, Application Development—Services, and Security—Services. Wipro is a Premium Partner and a Managed Services Partner for GCP. It has a significant client base for its managed services in Europe. It also has a large base of dedicated GCP professionals in the region.

## Strengths

**Comprehensive offering:** Wipro offers managed services through its Enterprise Digital Operation Hub, which supports on-premises, hybrid, and multicloud environments, including GCP. The hub enables IaaS and PaaS models with GCP-native features such as Google Kubernetes Engine (GKE), Google Container Registry, BigTable and BigQuery.

**Partner ecosystem:** Wipro’s managed services are enhanced by its extensive partner ecosystem, including key Google Cloud-related players such as VMware, Cisco, NetApp Palo Alto and Citrix.

## GCP expertise:

Wipro has specific expertise in a host of Google Cloud-specific technologies, including StratoZone (a tool for discovering existing infrastructure and assessing the benefits and costs of moving it to GCP), Google Cloud Migrate for Compute Engine (for migrating virtual machines from on-premises data centers to GCP), Migrate for Anthos (for migrating virtual machines (VMs) to container-based workloads that can run on different public clouds), Cloud Build and Google Cloud Monitor.

## Caution

Wipro should showcase more of its credentials for managed services for GCP in Europe. It should also consider incorporating more gainshare or risk-based options into the overall pricing mix for its managed services for GCP.





“A well-curated offering and a strong focus on security services make Tech Mahindra a Rising Star in managed services for GCP in Europe.”

Mark Purdy

# Tech Mahindra

## Overview

Tech Mahindra is headquartered in Pune, India and operates in 90 countries. It has more than 157,000 employees across 171 global offices. In FY22 the company generated \$5.9 billion in revenue, with IT services as its largest segment. It has strong expertise in the automotive, healthcare and life sciences industries. Tech Mahindra has a substantial client base for its managed services for GCP in Europe. It also has a large number of FTEs in the region.

## Strengths

**Curated offering:** Tech Mahindra offers a well-curated set of managed service modules for GCP, including SRE services, container management, VM management, data management, security, and hybrid/multicloud management.

**Security focus:** Tech Mahindra is a seasoned provider of managed security services for GCP for clients in the telecom, banking, manufacturing and retail industries. The security services include vulnerability scanning, compliance monitoring, threat detection, incident alert and response, distributed denial of service protection, and endpoint and managed web security.

**Focus on FinOps:** Tech Mahindra offers a range of frameworks and tools to help enterprises gain better visibility and control over their cloud costs. Along with incorporating a significant degree of cloud automation, its FinOps framework encompasses resource utilization tools, multicloud dashboards, chargeback reports, automated reporting, cloud resource sizing and decision tools.

## Caution

To move into the Leader quadrant, Tech Mahindra should seek to expand its client presence for managed services for GCP in Europe and showcase more of its credentials and success stories in the region.





# SAP Workloads

### Who Should Read This Section

This report is relevant to enterprises across industries in Europe for evaluating providers offering services related to Google Cloud SAP workloads.

In this quadrant, ISG highlights the current market positioning of such providers in Europe and how they address enterprises' critical challenges. In the past few years, the implementation of SAP S/4HANA has been one of the critical milestones, either as a greenfield or brownfield implementation.

RISE with SAP is driving the adoption of S/4 HANA among enterprises. Also, the end of the SAP ECC lifecycle pushes enterprises to adapt and migrate to the SAP HANA platform. However, high CAPEX investments in the HANA database give an excellent opportunity to use GCP due to the OPEX offer model and other incentives. However, enterprises are interested in understanding the value proposition of

Google Cloud vs. other hyperscalers such as AWS and Azure. They look for benefits offered by cloud platforms such as analytics, AI, ML and IoT, while assessing the target cloud platform rather than just running SAP workloads for cost benefits.

Service providers continue to focus on integrating Agile and DevOps processes into SAP services across development, implementation and managed services. Providers have developed internal and proprietary tools to deliver SAP S/4HANA services.

The complexity of SAP S/4HANA is directly proportional to the size of an enterprise, as most large enterprises' implementations take place at a global level, involving multiple regions, increasing the complexity of such projects. Hence, large enterprises prefer providers with a skilled workforce, high integration capabilities and a global presence.



**Technology Professionals** should read this report to understand the relative positioning of providers offering SAP on GCP in Europe and how they support enterprises' cloud transition requirements for SAP.



**Finance Professionals** should read this report to understand the positioning of providers offering SAP on GCP and how the implementation improves their critical tasks.



**Procurement** should read this report to understand the relative positioning of SAP-on-GCP providers in Europe and the trends that may influence partner selection.



Google Cloud Partner Ecosystem  
SAP Workloads

Europe 2023



This quadrant assesses service providers that offer **implementation, migration** and **managed services** for **SAP workloads** on GCP. Providers emphasize **accelerators** and **automation** assets and **functional** solutions.

Mark Purdy



## SAP Workloads

### Definition

This quadrant assesses service providers that offer provisioning and ongoing operations for SAP systems, such as SAP HANA on Google Cloud and its central management. These service providers use Google Cloud as a hardware replacement or hardware extension (as IaaS) in customer companies and optimize, design and develop new processes and business services as part of platform management. They do this by combining their services with SAP services and Google. This group of professional IT service providers is responsible for implementing and ensuring subsequent operations. Successful service providers must have strong relationships with Google Cloud and SAP. They should also be able to demonstrate, through customer case studies and success storyboards, how they have helped clients running SAP and related enterprise technology stacks across different industries, to leverage the Google Cloud ecosystem for SAP HANA Enterprise Cloud, S/4 HANA, SAP Ariba, etc. The focus will be on how clients realize value from SAP on GCP in terms of higher cost

efficiency, improved accuracy and speed of enterprise business processes running on the SAP tech ecosystem, and data and application security. Efficiencies achieved by clients can also be demonstrated in resizing virtual machines and speed of scaling of enterprise infrastructure elasticity and resilience.

### Eligibility Criteria

1. Scope and depth of service portfolio for **migrating workloads** to SAP on the Google Cloud Platform
2. Experience and expertise in rapid **process discovery, roadmap creation, migration impact assessment** and rightsizing assessment
3. Ability to **develop and design new processes** and customer outcomes for SAP on Google Cloud
4. Offering **customization, provisioning and support** to implement SAP applications and services
5. Ability and willingness to support **hybrid cloud** and hybrid provider environments
6. Strength of the provider's relationship with Google Cloud, measured by the number and type of **Google Cloud Certifications** from the Google Certified Cloud Program, and its relationship with SAP, measured by relevant SAP certifications
7. Experience in Google's site **reliability engineering principles**
8. Ability to support SAP's **software-as-a-service (SaaS)** model on GCP



### Observations

The leader space for SAP workloads on GCP continues to be sparsely populated, as only a few of the largest Global System Integrators (GSIs) have the expertise and client experience to compete at the top level in SAP, typically one of the most complex areas of IT implementation and migration. ISG continues to see the leaders heavily emphasize their deep and extensive partnerships with SAP and Google Cloud. These leaders typically offer a comprehensive set of services for SAP on GCP, including consulting and advisory services, migrations, implementations, modernization and various managed services for SAP. Leaders have also invested significantly in an array of accelerators and automation assets to accelerate the migration of SAP workloads to GCP. Most have invested in industry-inflected solutions for SAP on GCP in sectors such as aerospace and defense, retailing or natural resources, as well as in a variety of functional and domain solutions such as supply chain, finance, HR, smart warehouses and logistics. Some are incorporating sustainability elements into

their SAP on GCP offerings such as S/4 HANA implementations for ESG reporting. ISG also notes the emergence of provider offerings using RISE with SAP on GCP. Leaders are also actively incorporating elements of automation and ML into the SAP offerings, providing, for example, automated migrations or implementations of Google Cortex using SAP data.

From the 29 companies assessed for this study, 16 have qualified for this quadrant with four being Leaders.

### accenture

**Accenture**, a seasoned SAP practitioner, offers a broad range of migration, implementation and data services for SAP on Google Cloud. It has more than 7,000 professionals certified in Google Cloud and tens of thousands of SAP practitioners globally.

### HCLTech

**HCLTech** offers managed services and a full-stack approach to SAP workloads on GCP. It has also invested in developing various industry solutions for SAP on Google Cloud.



**TCS** brings a wide range of accelerators and automation assets to its offering for SAP workloads on GCP. It continues to invest significantly in growing its talent base for SAP and GCP.



**Wipro** offers a broad spectrum of services for SAP workloads on GCP and has considerable experience in complex migrations and modernizations for blue-chip enterprises in Europe and globally.





"In-depth experience in SAP and a broad offering of solutions and assets make Accenture a leader in the SAP on GCP space in Europe."

Mark Purdy

# Accenture

## Overview

Accenture is headquartered in Dublin, Ireland and operates in 49 countries. It has more than 738,000 employees across 200 global offices. In FY22 the company generated \$61.6 billion in revenue, with Consulting as its largest segment. Accenture has 9 Google Cloud Specializations, including SAP on Google Cloud, Migration to Cloud and Data Analytics. It is a 14-time Google Partner award winner, winning the 2021 Global Google Cloud Services Partner of the Year. Accenture has a large base of clients for its SAP on GCP services in Europe and a significant number of SAP and GCP practitioners in the region.

## Strengths

**Broad offering:** Accenture offers a wide range of SAP solutions and services across hyperscalers, including SAP S/4HANA implementations and migrations, industry transformations (for example, chemicals, defense and natural resources), and many functional solutions in areas such as supply chain, sustainability, finance, CX, sourcing and procurement, and human capital management. Accenture has co-developed several industry solutions with SAP. These include SAP Intelligent Asset Management (for asset-intensive companies); SAP Responsible Design and Production (for companies that generate consumer packaging); and SAP S/4HANA Defense and Security (for defense agencies).

**Accelerators and assets:** Accenture offers several frameworks and assets to accelerate migrations to SAP on GCP; for example, a composable SAP architecture for SAP on GCP and a solution for analyzing SAP data using Google Cortex.

**In-depth experience in SAP:** Accenture has been an SAP partner for more than 40 years, carrying out numerous implementations and migrations for large, complex enterprises worldwide. It has more than 7,000 professionals trained on Google Cloud with 8,700 active certifications. Globally, it has more than 70,000 SAP practitioners.

## Caution

To stay competitive in the SAP on GCP space, Accenture needs to increase the velocity of its solution and service development for SAP on GCP and showcase more GCP-distinct tools, client credentials, and success stories. It should also renew and enhance its marketing materials in this space.



# HCLTech



"A comprehensive offering and a raft of industry solutions make HCLTech a good choice for SAP workloads on GCP in Europe."

Mark Purdy

## Overview

HCLTech is headquartered in Noida, India and operates in 60 countries. It has more than 222,200 employees across over 215 delivery centers worldwide. In FY22 the company generated \$11.48 billion in revenue, with IT and Business Services as its largest segment. HCLTech has five Google Cloud specializations, including SAP on Google Cloud – Services, Infrastructure – Services and Cloud Migration – Services. In 2020 it was awarded the Specialization Partner of the Year – Infrastructure award, and in 2021 it won the Breakthrough Partner of the Year award. In Europe, HCLTech has a substantial number of dedicated resources for running SAP workloads on GCP.

## Strengths

**Comprehensive offering:** HCLTech offers full stack services for running SAP workloads on GCP, encompassing SAP assessments and advisory services, cloud adoption strategy and architecture, and SAP S/4 HANA transformations, all complemented by various automation tools and accelerators to accelerate migrations. HCLTech also offers a managed service for SAP on GCP, covering landscape management, integrations, monitoring and reporting, release management, and incident reporting.

**Commercial flexibility:** Recognizing the risks and complexities involved in SAP migrations and transformations, HCLTech takes a flexible approach to pricing by incorporating more outcome-based and profit/risk-sharing elements in its commercial deals.

## Industry solutions:

HCLTech has innovated several industry-inflected solutions for running SAP workloads on GCP, including intelligent maintenance repair and overhaul for sectors such as aerospace and defense and smart warehouse solutions for sectors such as fashion and apparel, manufacturing and retail.

**Client traction:** HCLTech has implemented SAP on GCP for major enterprises in Europe and globally. For one of the largest retail and consumer packaged goods companies in Europe, HCLTech migrated the client's workload to S/4 HANA on GCP, resulting in a 25 percent reduction in the total cost of ownership.

## Caution

To move further into the Leader quadrant in Europe, HCLTech should showcase more client credentials and success stories for SAP on GCP in Europe. It should also demonstrate more evidence of co-innovation and collaborative go-to-market approaches with Google and SAP.



# TCS



“Extensive experience in SAP implementations and migrations, combined with a wide range of accelerators and automation assets, makes TCS a strong choice among enterprises in Europe looking to migrate SAP workloads to GCP.”

Mark Purdy

## Overview

TCS is headquartered in Mumbai, India and operates in 55 countries. It has more than 613,900 employees across 300 global offices. In FY22 the company generated \$25.7 billion in revenue, with BFSI as its largest segment. TCS has 24 regional Google Cloud specializations, including Infrastructure – Services, SAP on Google Cloud – Services, Cloud Migration – Services, Data Management – Services, and Security – Services. In Europe, TCS has a significant client base for its services that support SAP workloads on GCP. It also has a large number of professionals in the region, with expertise in Google Cloud and SAP.

## Strengths

**Client traction:** TCS has carried out SAP implementations on GCP for a variety of blue-chip enterprises. It helped a media and telecoms company in the U.K. move from disparate legacy ERP systems and data warehouses to a scalable S/4HANA system on GCP, driving a 25 percent reduction in costs of infrastructure and improving flexibility and efficiency of operations.

**Comprehensive offering:** TCS provides a wide range of services to support SAP workloads on GCP, encompassing migration of SAP workloads to GCP, implementation of greenfield SAP S/4HANA applications, and implementation of Google Cortex using SAP data.

**Talent base:** TCS has a large number of SAP professionals in Europe and globally. It also has more than 20,000 certifications on GCP.

**Accelerators and assets:** TCS offers a broad arsenal of assets and tools to speed up SAP migrations and deployments. These include TCS ACE+ for pre-migration health checks and usage analysis, TCS DataSure for migration of SAP data from legacy systems to SAP S/4HANA, TCS Simplitize for remediation of code, TCS SAP Cloudify for provisioning and installing virtual machines, and TCS SAP CloudOps for support features such as backup and restore, system refresh, and patch upgrades.

## Caution

TCS should consider showcasing more Europe-specific credentials and success stories for its SAP on GCP services. It should also consider incorporating more outcome-based/risk-sharing pricing elements into its overall commercial models.



# Wipro



“A comprehensive offering, extensive client experience and a strong focus on sustainability make Wipro a leader in the SAP on GCP space in Europe.”

Mark Purdy

## Overview

Wipro is headquartered in Bengaluru, India and operates in 66 countries. It has more than 258,700 employees across 167 global offices. In FY22 the company generated \$10.4 billion in revenue, with IT Services as its largest segment. Wipro has six Google Cloud specializations, including Cloud Migration—Services and Data Analytics—Services. Wipro is a Google Cloud Premium Partner. It has a large number of dedicated Google Cloud and SAP professionals in the region.

## Strengths

**Comprehensive offering:** Wipro provides a broad spectrum of services that support SAP workloads on GCP. These include consulting and advisory, migration and modernization, application managed services, and RISE with SAP on GCP. Wipro also offers more than 70 extensions to SAP S/4HANA, enabling enterprises to tailor SAP based on their industry requirements.

**Sustainability features:** Wipro’s SAP on GCP offering includes several solutions to help enterprises achieve their sustainability and wider ESG goals, including product footprint management for product carbon emissions, S/4HANA implementations for employee safety and S/4HANA implementations for ESG performance management.

**Client traction:** Wipro has an established track record of helping blue-chip clients in Europe and globally migrate and modernize their SAP workloads on GCP. For a large German retailer, Wipro migrated 73 SAP instances running on legacy software in on-premises data centers to GCP, improving the operational efficiency and scalability of the data workloads. Wipro’s Cloud Studio framework was used to automate the deployment of virtual machines on GCP, speeding up the migration process.

## Caution

Wipro should consider increasing the proportion of risk-sharing / gain-share elements in its overall pricing mix for SAP workloads on GCP services. It should also explain how it helps clients choose among different hyperscalers (or RISE with SAP) when moving SAP workloads to the cloud.





# Workspace Services

### Who Should Read This Section

This report is relevant to enterprises across industries in Europe for evaluating the ability of providers offering Google Workspace services (GWS), including associated advisory, migration and integration services for Google Workspace, Google's productivity suite, collaboration, and content tools for enterprises.

In this quadrant, ISG highlights the current market positioning of Google Workspace providers in Europe and how they address the critical challenges faced in the region. Our assessment is based on the depth and breadth of the providers' service offerings and market presence.

In Europe, Google Workspace has recently seen increased adoption among individuals, enterprises and educational institutions. Below are some trends and developments related to GWS.

Enterprises look forward to a unified experience where they can monitor and administer the whole gamut of GWS. They partner with a provider with end-to-end expertise and experience in GWS and associated consulting and advisory, implementation and development, and change management strategies to enable enterprises with digitally transformed workspaces.

Providers should invest in building their capabilities around Google Workspace with expertise, customer PoV, reference architecture, frameworks and a quality talent ecosystem with global delivery capability.



**Technology Professionals** should read this report to understand providers' relative positioning and capabilities to effectively consume GWS and how they are compared in the market.



**Workspace Professionals** should read this report to understand the capabilities of GWS providers in Europe and how they compare to one another.



**Digital Professionals** should read this report to understand the positioning of GWS providers and how they can impact clients' ongoing transformation.





This quadrant assesses service providers that offer **implementation, migration and managed services** for Google Workspace. Providers emphasize their **workplace consulting** capabilities and **human-centered** approaches to migration and adoption.

Mark Purdy



## Workspace Services

### Definition

This quadrant assesses GSIs and IT providers offering advisory, migration and integration services for Google Workspace, Google's suite of productivity and collaboration and content tools for enterprises. Workspace provides a broad range of apps, including Gmail, Meet, Chat and Drive, to drive enterprise productivity and real-time collaboration. Google Workspace, which evolved from the G Suite productivity package, is developing rapidly and incorporating intuitive analytics, numerous data and device administration, and security features. Google Workspace brings personalized user experiences into controlled and secure enterprise environments. It allows multidevice and multichannel workspace integration and helps users get a seamless experience across their professional communication and content sharing practices. Enterprises seek providers that can orchestrate, integrate and augment the native Workspace functionality through

design and build services on intranets, websites and integration with additional enterprise and third-party data sources and applications. They should also provide training and change management services, advanced data search and retrieval capabilities, and license and cost management and enable advanced security management for data and devices. Enterprises are primarily looking for providers that can easily integrate Workspace's native tools and make data and content flow seamlessly across an enterprise.

### Eligibility Criteria

1. Ability to offer **advisory, design and consulting** services for Workspace services on Google Cloud
2. Experience in providing **training and change management** services for Workspace services
3. Experience in **legacy migrations to Workspace**, especially from Lotus Notes-based **on-premise**
4. **email systems**
5. Demonstrate advanced **content analytics and data search capabilities** for company content across Workspace
6. **Administration, IT governance and security services** for data workloads and modern endpoint management
7. Offer services and frameworks to **accelerate low-code/ citizen developer** activities on Workspace
8. Provide organization-specific **data analytics and insights around Workspace**, such as adoption rates and patterns of working and collaboration



### Observations

The adoption of the hybrid working model by most enterprises has increased the use of Google Workspace services (GWS) to improve the user experience and employee engagement through collaboration and productivity tools. This adoption by enterprises is driving service providers to invest and develop end-to-end service offerings by improving their partnership with Google. Google Workspace's ease of use and accessibility make it the preferred option for workers across geographies and industries to improve work-from-home productivity. The suite empowers users with frequently used critical tools integrated into a single platform, creating a unified collaborative medium. Service providers offer innovative and transformation-led engagement with enterprises embracing the digital workplace to improve employee collaboration and productivity.

Although the adoption of G Suite is less compared to Teams, there has been a substantial spike in the adoption by enterprises in the last 12 months as it commands a scalable, cloud-based workspace, ensuring secure, flexible and borderless collaboration.

However, only a few providers are advancing their capabilities around GWS. These service providers are quick enough to improve their implementation, migration and change management capabilities to support enterprises in their transformation journey.

Service providers have developed several architectures and frameworks, making the implementation and migration of Google Workspace easier. The greenfield and brownfield implementations are gaining more traction as enterprises advance their workspace journey. However, the demand for brownfield implementation is high as providers lack the right expertise and right skill sets.

Google and providers should continue investing in developing integrations that enable enterprises to connect two different platforms, providing much-needed selections for the hybrid model to succeed.

From the 24 companies assessed for this study, 15 have qualified for this quadrant with five being Leaders.

### accenture

**Accenture** offers a suite of services to facilitate enterprises to migrate and manage GWS, including consulting and advisory, technical development and change management. It has enabled large-scale migrations to Workspace for clients such as Imerys, Veolia, and Dalkia Westenergy.

### Capgemini

**Capgemini** and Google Cloud help enterprises adapt to the changing working model to be future-ready. Capgemini is one of the largest and most experienced partners with deep expertise in implementing, migrating and supporting Workspace projects.

### HCLTech

**HCLTech** provides a service catalog-based approach powered by its automation tools such as Velocity and DRYiCE for personification, end-user experience analytics, adoption, and change management.



As one of the experienced partners, **TCS** has developed various tailor-made offerings to enterprises that enable them to migrate to the GWS quickly.



**Wipro**, through its Thrive offering, helps enterprises with capable organization change management (OCM) practices and processes designed to improve the security and ease of workplace transformations.



# Accenture



“Accenture’s capabilities to build, transform and advance the customer’s workspace by developing and integrating the right solutions and platforms remain favorable.”

Mark Purdy

## Overview

Accenture is headquartered in Dublin, Ireland and operates in 49 countries. It has more than 738,000 employees across 200 global offices. In FY22 the company generated \$61.6 billion in revenue, with Consulting as its largest segment. Accenture invests in establishing new joint innovation centers in Dublin and other regions to pilot and deploy innovative solutions on Google Cloud.

## Strengths

**Alphabet 360° Value meter:** Accenture Google Business Group (AGBG) and Alphabet 360° Value meter are guided by six critical facets for any enterprise for a successful transformation that includes experience, sustainability, talent, inclusion and diversity, differentiation, and financial aspects. This framework combines all the technological aspects, joint go-to-market by Google and Accenture, co-development of industry and horizontal solutions, diversity and sustainability metrics, and talent development through certifications and upskilling.

## Industry credentials:

Accenture has a team of 7,000 accomplished practitioners with more than 8,700 certifications and has achieved nine externally audited Google Cloud specializations. Google named Accenture as Google Global Service Partner of the Year globally during FY22.

## Comprehensive and holistic service offerings:

Accenture’s value-led partnership with Google brings comprehensive Google Workspace Services such as assessment and strategic consulting, development and integration, migration, change management, and training, enabling enterprises to advance their workspace transformation journey.

## Caution

Accenture should invest in ramping up its marketing efforts through recent customer success stories and benefits obtained by the customers, thought papers, brochures and other marketing collateral.





“The deep expertise and experience demonstrated by success stories make Capgemini a leader in this space.”

Mark Purdy

# Capgemini

## Overview

Capgemini is headquartered in Paris, France and operates in 50 countries. It has more than 359,600 employees worldwide. In FY22 the company generated €22 billion in revenue, with Applications and Technology as its largest segment. Capgemini has supported more than 500 customers with its Connected Workspace solutions portfolio.

## Strengths

**Next level of service delivery:** Capgemini GWS offers customers differentiated value-added services through connected and enhanced employee experience across applications and devices. The company has developed capabilities that provide seamless transformation of digitally enabled workplaces, providing business continuity and improving the user and employee experience.

**In-depth GWS knowledge:** Capgemini has extensive experience in Google Workspace solutions, including architecture and design; platform engineering and migration; security and delivery; operations and support; and the whole scope of GWS. This expertise in GWS helps deliver productivity, optimize cost, lower risk and improve agility for customers.

## Employee experience portfolio:

This portfolio offers customers a range of connected services comprising collaboration, empowerment, and support capabilities. It provides a framework for mapping and managing the customer’s employee experience transformation. The services delivered alone or together complement and add value to one another, creating a value chain that improves productivity, sustainability and inclusivity.

## Caution

A quality talent ecosystem is critical for a provider to accomplish customer requirements. Capgemini should invest and focus more on building and scaling the cross-skilled GCP-certified professionals.



# HCLTech



“HCLTech’s engineering expertise helps create frameworks and IPs such as Cloud Acceleration Framework for quick Google Workspace deployment.”

Mark Purdy

## Overview

HCLTech is headquartered in Noida, India and operates in 60 countries. It has more than 222,200 employees across over 215 delivery centers worldwide. In FY22 the company generated \$11.48 billion in revenue, with IT and Business Services as its largest segment. During the last 12 months, HCLTech has launched three Google Cloud Labs across North America, Europe and APAC.

## Strengths

**HCLTech Workspace Fluid enablement:** HCLTech’s Workspace Fluid, a productivity and solution pack developed based on the enterprise digital maturity framework, enables enterprises to understand the basic pre-requisite infrastructure and network to accommodate a smooth transition to the digital workspace. This helps customers with hybrid productivity readiness assessments embedded with secured software-defined networks.

**Four-point deployment program:** HCLTech has developed a customizable deployment program for enterprises for a phased rollout and quick digital workspace adoption. This deployment program includes assessment, validation of design and standards, PoC on migration approach, and go-live/support.

**Focus on talent enablement:** HCLTech is highly ambitious in building the right talent ecosystem to offer Google Workspace to customers. As part of this, HCLTech expands its GWS portfolio by cross-skilling talents to be specialists across workspace design and migration, security, and change management to support customers with end-to-end workspace transformation.

## Caution

Given its experience in workspace solutions, HCLTech should consider offering workspace services based on outcome-based/risk-sharing pricing models.



# TCS



“TCS’ domain-focused innovation and expertise in the Google Workspace Suite make it a leader in this space.”

Mark Purdy

## Overview

TCS is headquartered in Mumbai, India and operates in 55 countries. It has more than 613,900 employees across 300 global offices. In FY22 the company generated \$25.7 billion in revenue, with BFSI as its largest segment. TCS has over 30,000 professionals trained on Google Cloud and more than 20,000 certifications in GCP. TCS has 24 regional specializations with 95 skill badges across various Google Cloud offerings. It has developed more than 25 industry solutions and over 40 business solutions on TCS Cloud Lab.

## Strengths

**One-stop services:** With end-to-end expertise in Workspace and GWS productivity applications and collaboration tools, TCS offers a gamut of digital workspace services. TCS GWS services include devices/operating systems rollout, antivirus rollout, and a 24/7 support ecosystem with dedicated program managers. This offering is powered by industry-aligned consultancy expertise, factory model delivery and various pricing/engagement models.

**Human-centric-led approach:** TCS delivers GWS led by persona-based employee experience through a set of accelerators and assets. The company has developed more than 40 reusable templates and artifacts to improve the turnaround time during the design and implementation, apart from using

industry-wide automation solutions such as AppSheet and Apps Script to build change management scripts, enabling faster time to market for customers.

**4R approach:** TCS’ 4R approach provides customers with a four-step migration process, including re-Imagine, re-Define, Realize, and Run. This approach covers the end-to-end migration transformation, spanning auditing, assessments and readiness, design and build environment, test and pilot, and production deployment. This, in turn, brings in several capabilities from various tools and frameworks, including more than 40 reusable templates.

## Caution

Given the strong expertise, experience and presence in the region, TCS should focus on tapping the small and medium enterprise businesses as they focus on transforming their workspaces by adopting modern workspace solutions such as GWS.



# Wipro



“Wipro’s expertise in transforming enterprises through G Suite, Google Voice and Contact Center AI makes it a Leader.”

Mark Purdy

## Overview

Wipro is headquartered in Bengaluru, India and operates in 66 countries. It has more than 258,700 employees across 167 global offices. In FY22 the company generated \$10.4 billion in revenue, with IT Services as its largest segment. Wipro’s Fullstride Cloud Services has fueled the investment to accelerate, innovate and integrate cloud offerings under one umbrella. Wipro, a premier partner, has 13 Google Cloud specializations, and more than 2,800 professionals were certified by the end of 2022.

**StrengthsGWS Admin lite tool:** Through its Cloud Studio, Wipro has developed this tool to allow employees to perform super admin tasks without increasing their privileges. It also enables them to focus on more valuable tasks apart from basic administration and IT support functions. This tool helps reduce the turnaround time to resolve tickets raised, thus improving the employee/user experience.

**Google Voice rollout:** Wipro has integrated multiple regional and global telephony providers into a single pane of glass by leveraging Google Voice capabilities. This integration enables global customers to instantly deploy VoIP solutions on top of G Suite across mobile and web platforms and voice transcriptions.

**Thrive offering:** This is a subscription-based service offering that covers end-to-end requirements for a successful digital workspace transformation by an enterprise. Thrive helps customers with software and administration tasks, change management, enhancements and development to meet the customer’s needs from an RoI and TCO standpoint. With its LIVE Workspace™, it helps create a 24X7 collaborative workplace for customers.

## Caution

Wipro should focus on building its quality talent base for Google Workspace in the rightshore locations by hiring and upskilling professionals through different cross-skilling methods. Enterprises consider this a critical element during the partnership.





# Appendix

The ISG Provider Lens™ 2023 – Google Cloud Partner Ecosystem report analyzes the relevant software vendors/service providers in the European 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 report includes research from the ISG Provider Lens™ program, ongoing ISG Research™ programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of May 2023 for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

1. Definition of Google Cloud Partner Ecosystem market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
  - \* Strategy & vision
  - \* Tech Innovation
  - \* Brand awareness and presence in the market
  - \* Sales and partner landscape
  - \* Breadth and depth of portfolio of services offered
  - \* CX and Recommendation



## Author & Editor Biographies

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**Mark Purdy**  
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Mark Purdy is a Lead Analyst for Europe at ISG Provider Lens™ and brings more than 25 years of experience working on economics and technology research in business and government. Mark has a particular focus on next-generation technologies, especially artificial intelligence and intelligent automation, digital twins, digital olfaction, machine learning, virtual reality and edge computing.

Before joining ISG, Mark was chief economist at a major consulting firm for 20 years, leading work on the economic impact of AI and business futures, amongst other topics. Before that, he was an

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**Srinivasan**  
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Srinivasan PN is a Research Specialist at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on AWS & Google Ecosystem, Digital Engineering, Manufacturing, and Mainframe. His area of expertise lies in engineering services and digital transformation. Srinivasan has close to 9 years of experience in the technology research industry, and in his prior role, he carried out research delivery for both primary and secondary research capabilities.

Srinivasan also authors enterprise context reports and global summary reports for his expertise. He also supports the advisors with his research skills and writes papers about the latest market developments in the industry.





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**Jan Erik Aase**  
**Partner and Global Head – ISG Provider Lens™**

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



### 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.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

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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 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 1,600 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](https://isg-one.com).





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**REPORT: GOOGLE CLOUD PARTNER ECOSYSTEM**