ISG Provider Lens™

Google Cloud Partner Ecosystem

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

Cognizant

QUADRANT REPORT | JUNE 2022 | EUROPE

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Data and sustainability drive the Google ecosystem

In recent years, Google has moved far beyond its origins in search engines and consumer technologies to become a major force in cloud and business-to-business (B2B) technologies. As one of the largest hyperscale public cloud providers, the technology titan provides technologies that underpin the operations of thousands of enterprises of all sizes across the world, helping them sell goods and services, organize supply chains and communicate with customers. Google's advanced capabilities in AI, data analytics and machine learning are becoming critical to business decision-making, providing unique insights into every aspect of business, from consumer analysis to financial forecasting to product inspection, among many others.

Despite this growing prevalence, many enterprises are still relatively new to the Google Cloud Platform (GCP), at least compared with those of the other hyperscalers, and they often struggle to fully capitalize on the platform's native capabilities and functionalities. They, therefore, turn for help to the Google Partner ecosystem, a complex web of global system integrators (GSIs), service providers, independent software providers (ISVs), big data and analytics specialists, and boutique consultancies. With this ecosystem now approaching a critical mass in Europe in terms of both depth and variety of services, ISG is focusing on the ecosystem for the first time to provide IT and business decision makers with a clearer view of the relative strengths and weaknesses of different providers across five quadrants: Implementation and

Getting **greater value from data** is key for enterprises

Integration services, Managed Services for Google Cloud, Data Analytics & Machine Learning (DAML), SAP Workloads and Google Workspace Services.

Enterprises are turning to GCP for many reasons, but fundamentally to take advantage of three core strengths, as well as differentiators, of the platform: data analytics; sustainability and environmental performance; and affinity for cloud-native architectures.

First, getting greater value from data is key for enterprises when looking at cloud providers. While many enterprises have moved from on-premises to public cloud or hybrid cloud, they are still struggling to effectively extract value from their organizational data, either because it is trapped in silos or too unstructured for effective aggregation. Google Cloud comes equipped with a vast arsenal of advanced data analytics and machine learning tools, notably BigQuery, a highly scalable, multicloud data warehouse enabling real-time, predictive analytics for business users across vast data spaces. GCP also brings integrated platforms for data scientists (Vertex) and machine learning modelers (Auto-ML), conversational AI tools such as Dialogflow, translation and video AI tools, and low-code applications such as AppsSheets for the budding citizen developers.

Ecosystem providers build on these native data and ML tools in many ways. In some cases, providers create custom point solutions for clients to address a specific business need, for example, a customer marketing platform using geo-spatial data from Google Maps, or a visual inspection tool for a manufacturing plant. Some providers are using the Google-native tooling to help enterprises bring stronger governance and searchability to their organizational data, for example by moving beyond traditional data warehouses and data lakes to the creation of organization-wide data meshes that allow domain-driven searching by individual business functions. Other providers are helping integrate the Google tools with external, third-party data sources. Many providers offer data advisory and assessment services to provide assistance with data-maturity benchmarking and assessment, data strategy and roadmap creation, and data-estate modernization. No matter what the model is, the core goal is to enable enterprises to extract greater value from their data.

The second core strength of GCP is its importance in helping organizations achieve their sustainability goals. Following the COP26 Climate Agreement in late 2021, the achievement of net-zero carbon emissions targets by 2030 has become the paramount sustainability goal for many large enterprises worldwide. Providers told us that environmental performance has, over the past year, become a key consideration for enterprises looking to migrate from on-premises data centers to the public cloud. Despite massive increases in computing power, hyperscalers' data centers have achieved remarkable improvements in energy efficiency over the past decade, and Google Cloud, in particular, stands out for its carbon-neutral data centers and its commitment to sustainable computing. More broadly, the Google Cloud offerings and toolset play a key role in helping enterprises and industries achieve their broader sustainability goals. Providers can harness Google's data and machine learning tools, for example, to help with solutions such as more accurate carbon accounting, optimization of cloud usage to lower carbon footprints, better measurement of ESG performance, optimization of manufacturing processes to reduce energy and materials consumption, or improved monitoring of

sprawling supply chains. Providers are also creating workspace solutions to support remote and hybrid working, which again has a beneficial environmental impact through reduced travel.

The third core strength of GCP lies in its strong alignment with cloud-native technologies and ways of working. While containerized applications and Kubernetes orchestration platforms can be deployed across any public cloud, GCP is particularly suitable for such environments because of its highly scalable and composable architecture, its rich range of cloud-native tools, and its pioneering role in cloud-native operations and the development of site-reliability engineering principles. Google Anthos provides a unique platform for enterprises that wish to use the Google-native tooling across different hyperscaler environments. Ecosystem partners offer a range of implementation and integration services for GCP, from the basic lift-and-shift approach to full-scale modernization on the platform. The GSIs also typically offer a range of managed services, encompassing services such as multicloud management, operations support, observability, security, FinOps, reporting, predictive analytics, cloud automation and cluster provisioning.

The Google ecosystem continues to evolve rapidly, growing in scale, depth and complexity. ISG has identified several key trends shaping this still-emerging ecosystem:

First, we are seeing the emergence of Google-native industry clouds. Although these are not yet at the level of development of the Microsoft industry clouds initiative, providers are beginning to craft Google-native industry clouds in sectors such as banking, financial services and insurance (BFSI); healthcare and life sciences (HCL); retail; manufacturing; communications; utilities and others.

Second, ecosystem providers are using Google's AI/ML capabilities to create very targeted, persona-driven services and solutions. These solutions include CFO data analytics solutions that provide forecasting of cash flow or other financial metrics, or CMO analytics offerings that provide insights into customer behavior or enable the optimization of marketing spend across different social media channels.

Third, the Google ecosystem is helping democratize access to powerful ML-based technologies. As one DAML provider put it to us, "AI is no longer the preserve of the global tech giants." Previously, small and midsize enterprises could only look and marvel at the AI-based recommender engines of companies such as Netflix and Amazon that had the compute resources to train such engines on vast quantities of data. With the emergence of Google's low-cost, cloud-based AI tools, nearly every enterprise can now access similar ML capabilities.

Fourth, providers are harnessing the DAML capabilities of Google Cloud to help enterprises craft new data architectures. The goal is better and faster access to data for different business users across an organization. In particular, we are seeing a move beyond centralized data lake architectures to cutting-edge data mesh constructs, in which data remains distributed across an organization in its own databases but is accessed through domain-driven machine learning capabilities. Different business users define and own the relevant domain, for example, financial data for finance users or customer data for marketing analysts, which then makes the relevant data discoverable and searchable.

Finally, the massive shift toward remote and hybrid working has given significant impetus to Google Workspace, Google's suite of workforce communication and productivity tools. Although still relatively nascent compared to other platforms, Workspace is gaining traction due to its collaborative equity; it provides consistent performance across different devices, works equally well in remote versus office environments, has low training requirements and makes most features available to users independently of the licensing level.

Environmental performance has become a key consideration for enterprises looking to migrate from on-premises data centers to the public cloud

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 Technologies	Product Challenger	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	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
Capgemini	Not In	Not In	Not In	Not In	Leader
Cloud Reach	Contender	Not In	Not In	Not In	Not In
Cognizant	Leader	Not In	Leader	Product Challenger	Not In
CTS	Rising Star	Not In	Not In	Not In	Product Challenger
Datatonic	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
Deloitte	Not In	Not In	Not In	Product Challenger	Not In
Devoteam G Cloud	Product Challenger	Not In	Product Challenger	Contender	Contender
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
GFT	Not In	Leader	Not In	Not In	Not In
Go Reply	Product Challenger	Contender	Not In	Not In	Not In
Grid Dynamics	Contender	Not In	Not In	Not In	Not In
HCL	Leader	Leader	Leader	Product Challenger	Product Challenger
IBM	Leader	Leader	Leader	Leader	Not In

Provider Positioning

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	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Infosys	Leader	Leader	Leader	Product Challenger	Product Challenger
Kyndryl	Contender	Not In	Not In	Not In	Not In
LTI	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
Mindtree	Product Challenger	Contender	Product Challenger	Not In	Not In
Netpremacy	Not In	Not In	Not In	Not In	Product Challenger
Oxya	Not In	Not In	Not In	Contender	Not In
Persistent Systems	Contender	Not In	Not In	Not In	Not In
Quantiphi	Not In	Leader	Not In	Not In	Not In
Rackspace Technology	Rising Star	Not In	Rising Star	Product Challenger	Not In
Softserve	Not In	Product Challenger	Not In	Not In	Not In

Provider Positioning

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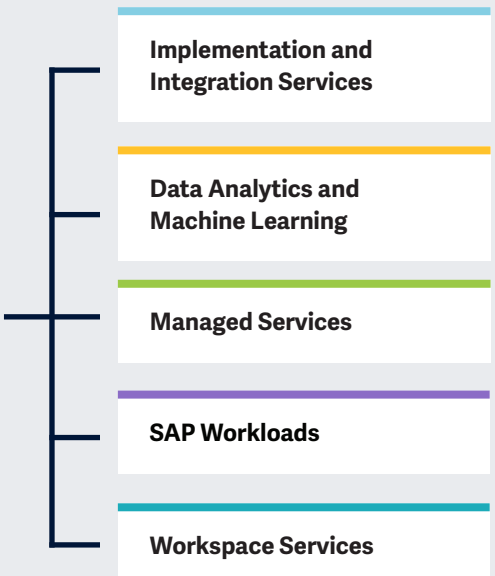
	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Sopra Steria	Contender	Not In	Market Challenger	Not In	Not In
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Rising Star	Product Challenger	Not In	Not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

A study on five key dimensions of the **emergent Google Cloud ecosystem**



Simplified Illustration Source: 2022

Definition

Google Cloud has become one of the most prominent cloud and technology providers in the world. The technology giant's capabilities and services have evolved rapidly in recent years, with Google Cloud underpinning the data workloads and applications of many of the world's leading enterprises. Google Cloud has significantly advanced application modernization through its creation of the open-source Kubernetes platform. It has also pioneered many developments, tools, and assets in data analytics and machine learning. Despite these advances, many enterprises still struggle to fully integrate the Google Cloud suite of technologies and capitalize on the rich native tooling and features of the platform. They therefore turn to the surrounding Google ecosystem, a complex community of global system integrators (GSIs), IT managed service and consulting providers, and ISVs, for help in many areas. These include migration and implementation; making better use of the native tools of the platform; licensing and cost management; developing expertise and skills; machine learning; and citizen developer initiatives. They are mainly seeking partners that can innovate atop the platform and help drive their IT and business transformation. Enterprises that are taking an AI-driven innovation route to pivot to digital are naturally gravitating to Google as one of the key hyperscaler platforms, given its proven prowess in the AI technologies and algorithms space. They refer service providers that have demonstrated capabilities in development, test and run services for Google Cloud Platform (GCP), and in AI/machine learning and big data applications in businesses. They are also looking for providers with a strong track record in delivery, and the ability to provide quality talent and trained and GCP certified employees.

Businesses also need providers with holistic and balanced capabilities that can help their organizations innovate in the post-pandemic environment. Customer requirements are now further augmented by increased environmental, social and governance awareness, data privacy and security practices, and region-specific regulatory standards compliance.

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

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

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

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

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following 5 quadrants: Implementation and Integration Services, Data Analytics & Machine Learning, Managed Services for Google Cloud, SAP Workloads and Google Workspace Services.

This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- 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 US$20 million and US$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 US$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 a service provider(s) which ISG believes has 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.

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.

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.

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

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 for hybrid and multicloud environments.

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

Enterprises are approaching a higher level of GCP implementation through reference architectures and automated deployment solutions to enable faster implementation of GCP. In addition to this, enterprises are more optimistic about the adoption of various open-source solutions, such as tech stack, operating system, databases, app servers, and DevOps tools.

Hybrid cloud and multicloud setups are considered the new normal landscape in many enterprises, and the unified management and governance of hybrid cloud and multicloud environments is evolving fast in the market. Service providers should also possess higher levels of cloud security tools that provide better capabilities, leveraging AI and a security center with exceptional features, to make cloud environments more secure.

IT leaders should read this report to understand the relative positioning and capabilities of partners that will help them effectively consume services from GCP and understand how these providers' technical capabilities are compared with the rest of the market.

Software development and technology leaders should read this report to understand the positioning of managed service providers and how the providers' offerings can impact an enterprise's ongoing transformation initiatives, while identifying the benefits of moving to the cloud.

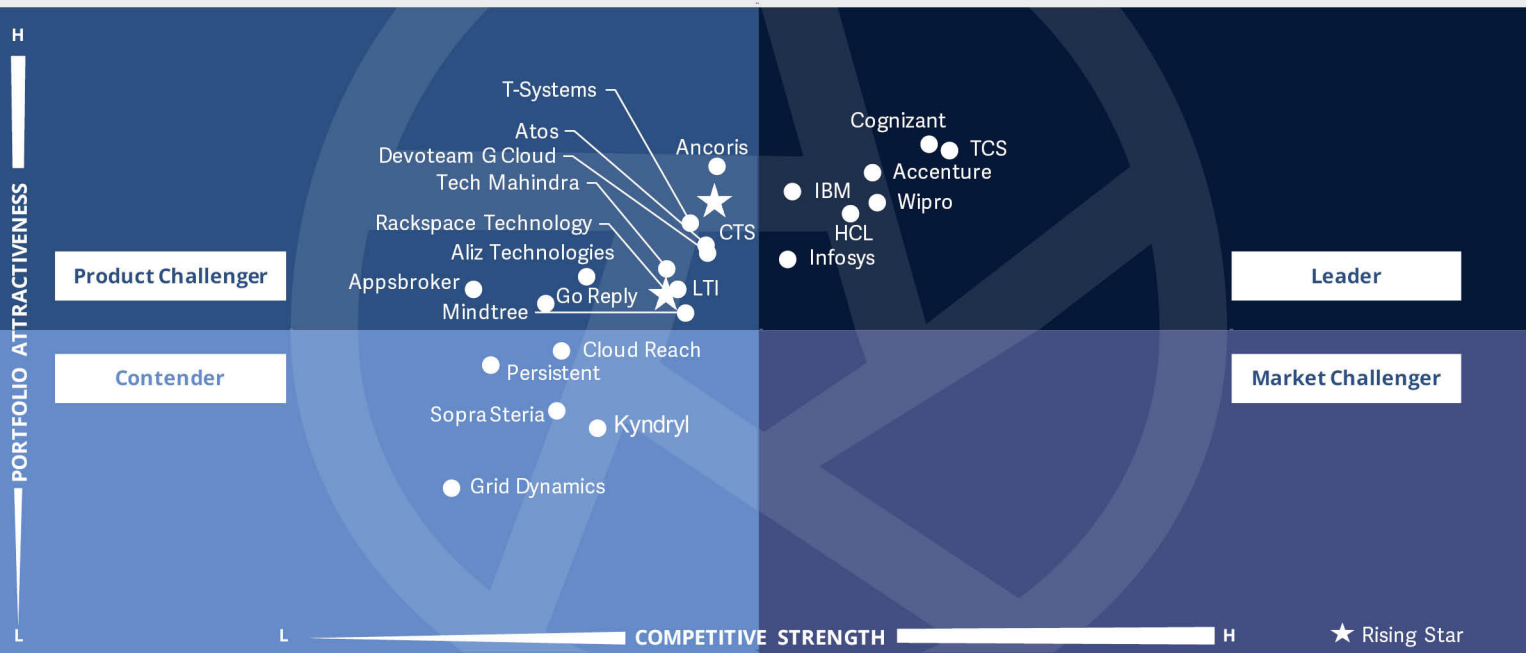
Sourcing and procurement professionals should read this report to understand the provider ecosystem for Google Cloud implementation and integration services in Europe and gain knowledge about how providers compare to one another.

ISG Provider Lens™

Source: ISG RESEARCH

Google Cloud Partner Ecosystem
Implementation and Integration Services

Europe 2022



This quadrant assesses how service providers are enabling cloud migration and modernization atop the Google Cloud platform. Providers are **helping enterprises capitalize on the native capabilities of GCP** to drive greater business value.

Mark Purdy

Definition

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

Eligibility Criteria

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

Observations

With many enterprises continuing to move to cloud-based models in response to the rise in remote working and consumption during the pandemic, the demand for implementation and integration services across all public cloud platforms remains strong. While basic 'lift and shift' implementations are still common, several providers observed that we are now seeing the emergence of a more mature wave of cloud implementations, in which the focus is shifting from pure efficiency or cost considerations to cloud-native modernizations that drive greater business innovation and top-line growth. Google Cloud is ideally situated to benefit from this second wave, with its range of cloud-native tools and capabilities in areas such as data warehousing, analytics, and machine learning. Enterprises are also increasingly looking to move beyond single hyperscalers, toward a true multicloud architecture, either to reduce technical debt, manage costs or achieve specific business outcomes, such as getting greater value from their data. Google Cloud is again well positioned to benefit from this trend, with Google Anthos extending Google Cloud capabilities onto other hyperscaler platforms. Providers are responding to the rise of GCP by investing in a rich array of migration accelerators for the platform, setting up dedicated Google Cloud business units and stepping up their certification efforts on the platform.

From the 40 companies assessed for this study, 24 have qualified for this quadrant, with seven being Leaders and two Rising Stars.

accenture

Accenture is one of the largest system integrators on Google Cloud, with a deep talent base of certified practitioners on the platform. Its approach focuses on helping both digital-native and traditional legacy IT organizations move to a cloud-native posture on GCP.

Cognizant

Cognizant has set up a dedicated Google Business Group and is making significant investments in Google Cloud skills and capabilities. Its recent acquisitions of Servian, a Sydney-based cloud and AI company, and Contino, a cloud-native digital transformation specialist, will significantly boost its capabilities in the Google Cloud implementation space.

HCL

HCL offers a rich suite of GCP accelerators, with a particular focus on helping clients move to cloud-native, microservices structures on the platform. Clients can also benefit from co-innovation capabilities through its three Google-Cloud-specific labs in the U.K. (London), the U.S. (Dallas) and India.

IBM

IBM has developed an impressive array of migration tools and accelerators to help clients on their journey to Google Cloud. It also strongly emphasizes co-innovation and continuous modernization through its Garage methodology and analytics tools. In addition, IBM's Red Hat offers a strong focus on cloud-native transformation on the platform.

Infosys

Infosys has a deep, multifaceted relationship with Google Cloud as a customer, provider and product developer. It has a significant client base for its implementation and integration services in Europe and has invested heavily in a range of industry and point solutions for the platform.

TCS TATA CONSULTANCY SERVICES

TCS has ten specializations on Google Cloud and a swathe of expertise designations. A Google Cloud Breakthrough Partner of the Year in 2020, TCS has carried out migration and modernization programs on GCP for some of the largest and most complex enterprises in Europe.

CTS

CTS, a Rising Star in the European Google Cloud ecosystem, offers a wide range of implementation and integration services harnessing Google Cloud's native capabilities. A Google Cloud Public Sector Partner of the Year for EMEA in 2020, CTS offers an array of accelerators to speed the transition to GCP.

Rackspace Technology

Rackspace Technology, a Rising Star in this quadrant, can build on its legacy as a managed hosting provider to bring considerable cloud engineering experience to its wide range of integration and implementation services on GCP. It has carried out migration projects on GCP for a range of enterprises in Europe.

Leader

"Deep skills and targeted investments make Cognizant a Leader in this quadrant."

Mark Purdy

Cognizant

Overview

Cognizant is a global professional services and technology company, headquartered in Teaneck, U.S. Cognizant has more than 17,000 personnel deployed across the Google ecosystem, and more than 2,000 certified Google Cloud professionals. It has eight Google Partner specializations and expertise certifications, including Infrastructure – Services and Cloud Migration – Services, and was a Google Breakthrough Partner of the Year for Europe, Middle East and Africa in 2020.

Strengths

Strong strategic focus on Google: Cognizant has continued to invest heavily in building up its strategic relationship with Google, setting up a dedicated Google Business group, making niche acquisitions such as Servian (AI/cloud company) and Contino (cloud-native specialist), and establishing ambitious go-to-market growth strategies for Europe, the U.K. and APAC in particular. It already has more than 70 joint customers with Google Cloud.

Deep skills base: Recognizing that Google Cloud skills are often in short supply, Cognizant is ramping up its investments in skills and capabilities on Google Cloud, aiming at more than 7,000 certified professionals in the near future. The split of skills is also notable, with about 30 percent of its talent base focused on infrastructure, central to complex implementation and integration projects.

Compelling credentials: Cognizant has carried out complex migration and integration projects for blue-chip clients in both Europe and the U.S., including the modernization of a cross-border payments system for a household name UK bank, using a cloud-native architecture on Google Cloud.

Caution

Cognizant should consider ramping up its marketing efforts to better showcase its GCP-related abilities and client credentials to a wider audience of European decision makers.

Data Analytics and Machine Learning

Who Should Read This

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

Customers focus more on monetization now, and the data marketplace helps them connect with the partner ecosystem to monetize data. This is gaining traction in different industry verticals, such as retail, consumer packaged goods, energy, airlines and healthcare. 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 machine learning and a top-notch talent ecosystem and delivery ecosystem across the globe.

IT leaders should read this report to understand the relative positioning and capabilities of partners that will help them effectively consume services from Google Cloud and understand how these providers' technical capabilities are compared with the rest of the market.

Software development and technology leaders should read this report to understand the positioning of managed service providers and how the providers' offerings can impact an enterprise's ongoing transformation initiatives, while identifying the benefits of moving to the cloud.

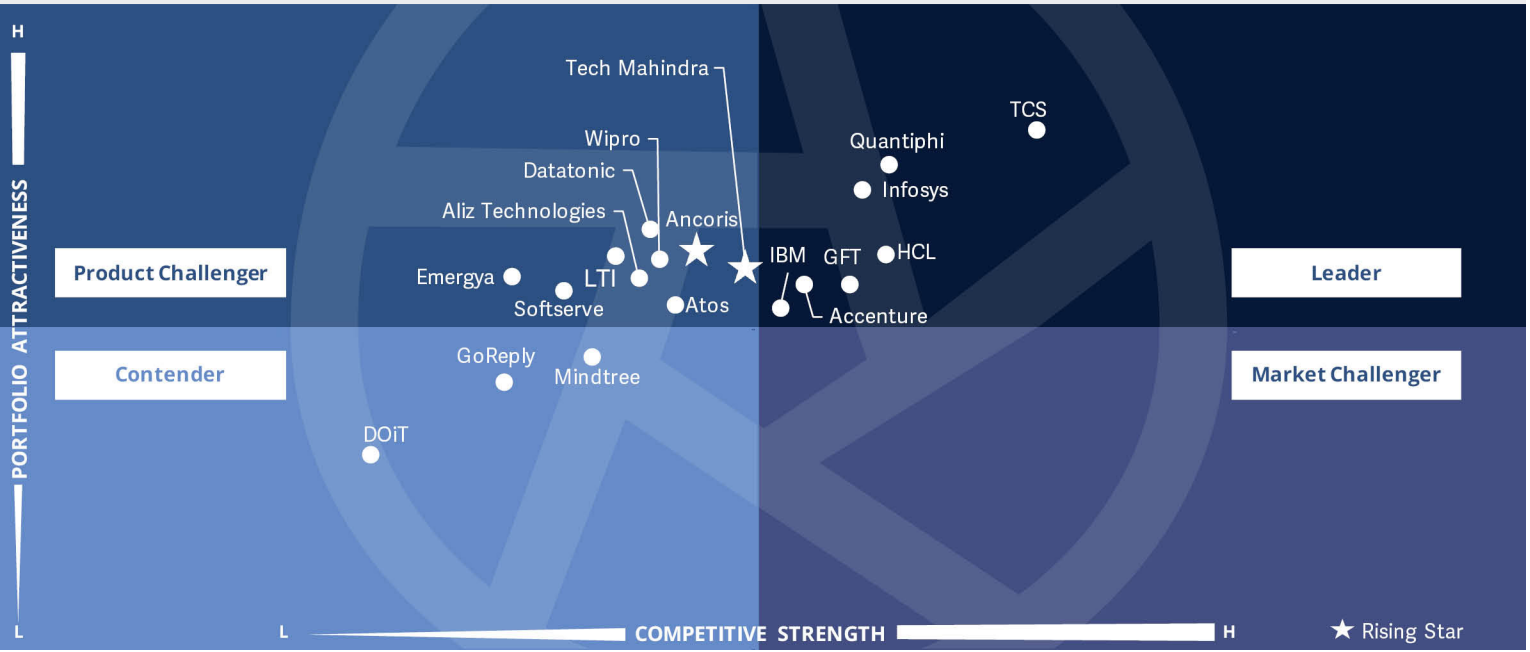
Digital leaders should read this report to understand the provider ecosystem for Google Cloud data analytics and machine learning services in Europe and gain knowledge about how providers compare to one another.

ISG Provider Lens™

Source: ISG RESEARCH

Google Cloud Partner Ecosystem
Data Analytics and Machine Learning

Europe 2022



This quadrant assesses service providers that offer data analytics and machine learning solutions on Google Cloud. Service providers are **helping enterprises with data modernization, governance and ML capabilities.**

Mark Purdy

Definition

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

Eligibility criteria:

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

Observations

Data and machine learning are the lifeblood of Google Cloud. In moving workloads to Google Cloud, enterprises are typically seeking to liberate data within their organizations and use it to drive better decision-making and greater business value. Google Cloud is tailor made for such applications, given its highly extensible and composable nature, as well as its impressive range of DAML native tooling. We are seeing increased interest in new data architectures such as data mesh, as organizations move away from traditional data warehouses and data lakes. Providers are developing a wide range of industry and point solutions using Google Cloud's DAML features, such as use cases for computer vision or conversational AI. Providers are also developing persona-based analytical tools, for example for chief financial officers, chief marketing officers or chief sustainability officers within enterprises. Another important trend is data sharing through Google's Data Marketplace, which makes it possible for enterprises to share and access data on topics as diverse as COVID-19, bio-medical literature, bitcoin and crime trends in Chicago. Enterprises are also paying greater attention to data and AI governance, for example, through tools that help trace the provenance of data and assess its quality and integrity at various stages of use.

From 39 companies assessed for this study, 19 have qualified for this quadrant, with seven being Leaders and two Rising Stars.

accenture

Accenture is leading with its Data Modernization Solution designed to help enterprise clients exploit the native capabilities of Google's BigQuery features, as well as targeting the intelligent marketing sector through its customer data architecture, providing a 360-degree view of the customer.

GFT

GFT is a global digital technology services company that won Google Cloud Breakthrough Partner of the Year for EMEA in 2019. GFT has specialism in computer vision technology and a strong R&D focus through two CoEs for data and machine learning in Europe.

HCL

HCL offers data and machine learning solutions on Google Cloud, with strong point solutions in areas such sustainable supply chains and real-time inventory and compliance. It has considerable depth of talent in data and analytics on GCP in Europe and has carried out projects for many European and global enterprises.

IBM

IBM invests heavily in a range of machine learning and data applications that can be used on Google Cloud, including conversational AI and process mining. It is also making a strong play with its IBM Data Stage out-of-the-box solution for data analytics on Google Cloud and other public clouds.

Infosys

Infosys has developed a deep, multifaceted relationship with Google Cloud as a customer, product developer and collaborative partner. It has plans to drastically expand its pool of GCP-certified personnel, and it has been extremely active in bringing GCP solutions to its work with clients.

quantiphi

Quantiphi, based in the U.S., is an AI-first digital engineering services company that has, globally, one of the largest expert pools for Looker, the business intelligence and data analytics platform acquired by Google in 2020. Quantiphi was the Google Cloud Specialization Partner of the Year – Data and Analytics in 2020.

TCS TATA CONSULTANCY SERVICES

TCS, a 2020 Google Cloud Breakthrough Partner of the Year, offers a wide range of data modernization, data analytics and machine learning solutions on Google Cloud. It has considerable experience implementing data and machine learning solutions for a range of major global brands in Europe and beyond.

Ancoris

Ancoris, a UK-based Google Cloud pure play provider, stands out for its range of persona-based data analytics and machine learning solutions targeting the needs of business users such as chief marketing officers and chief financial officers. Its data modernization and AI solutions have been implemented for a range of U.K. and European clients.

Tech Mahindra

Tech Mahinda, a Rising Star in this year's report, offers a range of industry and point data and analytics solutions on Google Cloud, such as AI-powered vendor selection and AI-based legal assistance. Its focus on IoT data solutions also offers a key point of differentiation.

Managed Services

Who Should Read This

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 key challenges associated with offering managed services in the Google cloud ecosystem. ISG's assessment is based on the depth and breadth of 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. Intelligent cloud operations and reliability engineering are considered top priorities by enterprises and service providers.

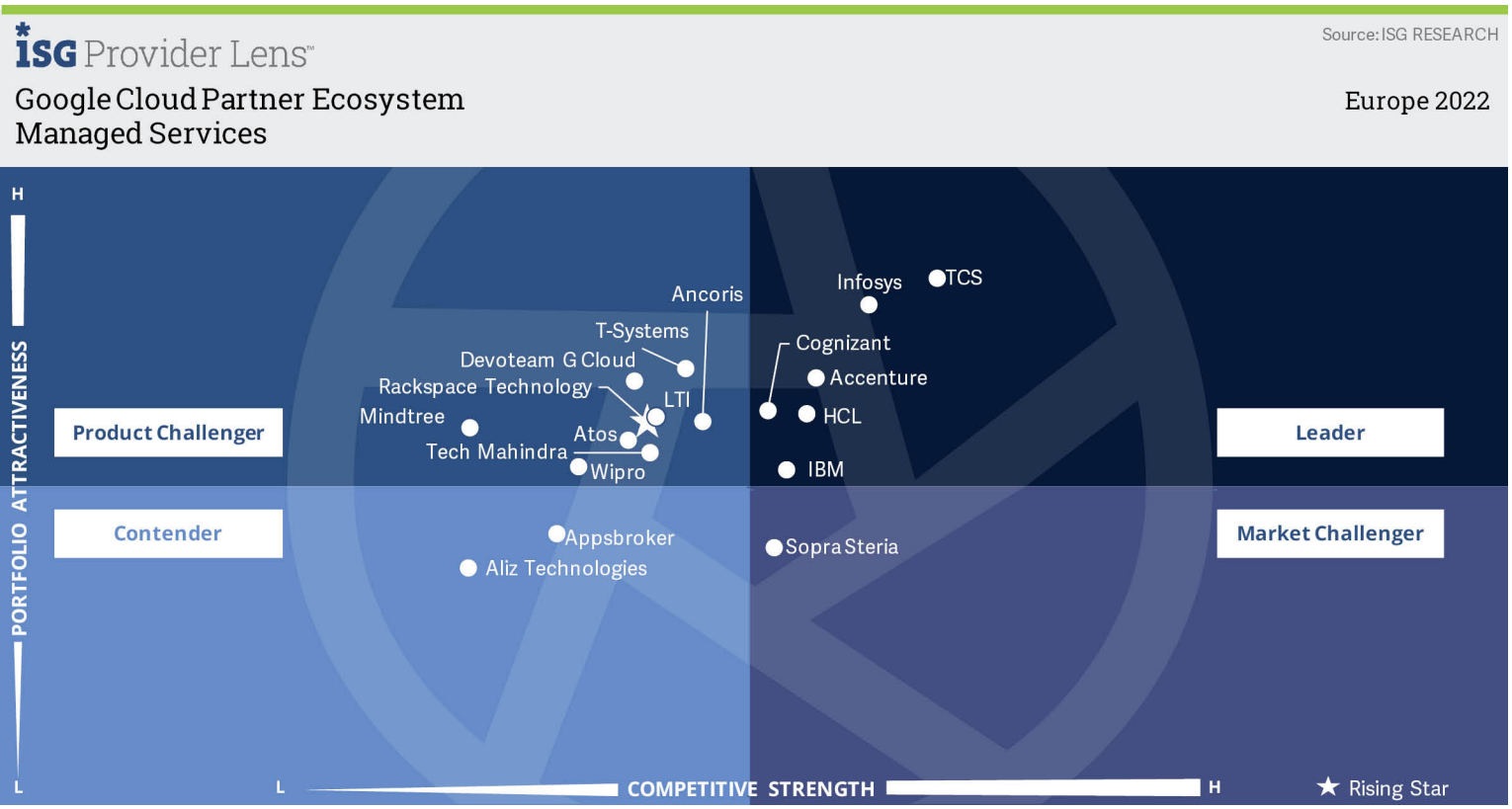
Along with these, multicloud adoption driven by Google Anthos is driving platform efficiency and risk management.

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

IT leaders should read this report to understand the relative positioning and capabilities of partners that will help them effectively consume services from GCP and understand how these providers' technical capabilities are compared with the rest of the market.

Software development and technology leaders should read this report to understand the positioning of managed service providers and how the providers' offerings can impact an enterprise's ongoing transformation initiatives, while identifying the benefits of moving to the cloud.

Sourcing and procurement professionals should read this report to understand the provider ecosystem for Google Cloud managed services in Europe and gain knowledge about how providers compare to one another.



This quadrant assesses service providers that offer managed services on Google Cloud Platform. Providers are emphasizing new capabilities such as **SRE, automation and DataOps as part of their managed service offerings.**

Mark Purdy

Definition

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

Eligibility Criteria

1. Experience in designing, building, and **managing public and multicloud** environments with a focus on Google Cloud
2. Support in the development of **software code, cloud native, 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. Well-developed **security** practices and capabilities
6. Number and location of **provider resources** that assist enterprises with Google Cloud
7. Strength of the provider's **partnership** with Google Cloud, measured by the number and category of relevant certifications, duration of relationship with Google, and evidence of strategic cooperation between the provider and Google

Observations

The rise of Google Cloud, alongside a more general trend toward multicloud platforms among enterprises, is starting to reshape the nature of demand for managed services on public clouds. Google Cloud's strengths are in particular areas that enterprises highly value, which are data, sustainability, automation and machine learning, to name a few. This means that providers' offerings must evolve beyond the traditional managed service sphere that covers patching, security, SLAs, etc. to encompass a wider range of services to drive business value, such as data management and governance, machine learning capabilities, sustainability and ESG. One of the key trends we have observed this year is the emergence of industry cloud solutions on Google Cloud (cloud services that are tailored to meet functional needs (e.g., regulatory compliance) of specific industries). The rise of multicloud management is also driving the need for provider skills in technologies such as Google Anthos. Providers are also investing in capabilities considered 'native' to GCP, for example cloud-native operations, site reliability engineering (SRE) and platform reliability engineering (PRE) skills. With the rise of multicloud strategies, providers are also creating solutions to help enterprises manage their cloud costs through FinOps. Finally, talent scarcity remains a significant constraint in the expansion of managed services, and most providers are investing heavily in increased certification on GCP.

From the 40 companies assessed for this study, 18 have qualified for this quadrant, with five being Leaders and one Rising Star.

accenture

Accenture has many professionals trained on Google Cloud and is a 13-time Google Cloud Partner award winner. It offers hybrid and multicloud solutions on Google Cloud, being an early partner for Google Anthos. It has developed more than 15 industry solutions for Google Cloud that address specific industry requirements.

Cognizant

Cognizant has a large number of certified professionals on GCP. It emphasizes an industry-first approach to Google Cloud, with an array of new use cases in areas such as BFSI, healthcare and sustainability.

HCL

HCL's cloud managed services enable DevOps and SRE-driven operations that ensure application reliability, allow infra automation and enhance user experience.

IBM

IBM is emphasizing its capabilities in DevOps as part of its managed services solutions for Google Cloud (and others), as well as offering clients a variety of flexible solutions for deploying private clouds on GCP.

Infosys

Infosys has invested heavily in building a deep, multi-faceted relationship with Google Cloud. It has a substantial talent base in Europe for its managed services on GCP and offers a wide range of managed service solutions for the platform.

TCS has an impressive array of specializations and expertise designations on Google Cloud. In 2020, it was Google Breakthrough Partner of the Year. TCS is investing in industry solutions for GCP, as well as providing multicloud orchestration via Anthos as part of its enterprise reliability services offering.

Rackspace Technology

Rackspace Technology, a Rising Star in this year's report, is providing multicloud solutions on GCP through its elastic engineering approach. It offers highly adaptable and scalable managed services supported by pods of dedicated experts that can be quickly drawn upon for ongoing infrastructure and DevOps support.

Leader

"With its industry-first solutions, Cognizant is a Leader in managed services for Google Cloud."

Mark Purdy

Cognizant

Overview

Cognizant is a global professional services and technology company headquartered in Teaneck, U.S. It has more than 17,000 personnel deployed across the Google ecosystem and more than 2,000 certified Google Cloud professionals. It has Google Partner specializations in Infrastructure - Services and Application Development - Services and expertise designations in such areas as Google Cloud app development and monitoring, Google Cloud databases and Google Cloud networking.

Strengths

Industry-first focus: With enterprises increasingly looking for hyperscalers for industry cloud solutions that are finely attuned to their needs and performance metrics, Cognizant is leading with its industry-first approach. Its Google industry cloud solutions enable organizations to get better business outcomes through data analytics and enabling new use cases in areas such as BFSI, supply chain, intelligent manufacturing, healthcare and sustainability.

CMO friendly: With their special attention to data and analytics, Cognizant cloud solutions are likely to particularly appeal to chief marketing officers looking at cloud solutions not just as a driver of cost efficiency but as a way to drive new insights and business performance outcomes for their organizations.

Innovation clouds: Cognizant puts a strong emphasis on Google Cloud as a platform for innovation. For example, its innovation cloud offering combines Google Cloud with Google Maps to create intelligent marketing platforms for CMOs. It also uses its Google Cloud innovation labs to support customer use cases in areas such as smart manufacturing and IoT.

Caution

Cognizant should consider ramping up its marketing efforts to better showcase its managed services on GCP to a wider audience of European decision makers.

SAP Workloads

Who Should Read This

This report is relevant to enterprises across all industries in Europe for evaluating providers offering Google Cloud SAP implementation and integration services.

In this quadrant, ISG highlights the current market positioning of providers of SAP implementation and integration services on Google Cloud in Europe and how they address the key challenges faced by enterprises. 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.

The COVID-19 pandemic impacted SAP S/4HANA adoption, as enterprises slowed down their transformation initiatives and instead concentrated on cost efficiency. SAP's new "RISE with SAP" campaign bundles existing SAP assets by offering business transformation to enterprises, thus accelerating their cloud adoption.

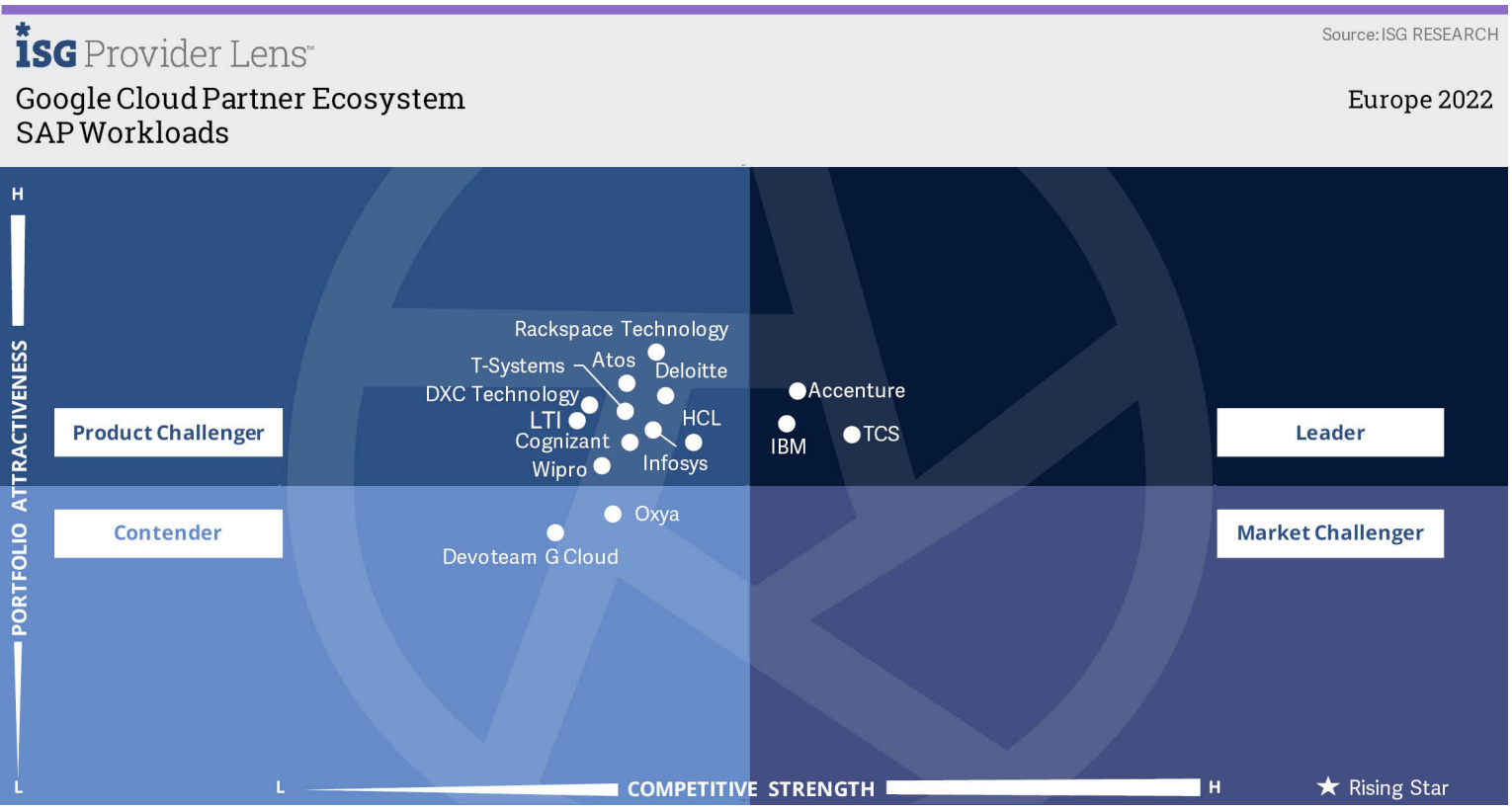
Service providers continue to focus on integrating agile and DevOps processes into SAP services across development, implementation and managed services. Providers have developed their own internal and proprietary tools to deliver SAP S/4HANA services.

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

Enterprise IT leaders should read this report to understand the relative positioning of SAP-on-Google-Cloud service providers across Europe, and how these providers' technical capabilities meet enterprises' requirements to succeed with a cloud transition for SAP.

Sourcing, procurement and vendor management professionals should read this report to understand the relative positioning of SAP-on-Google-Cloud service providers in Europe and understand the broader trends in the service ecosystem that may influence decisions about partner selection.

Finance, HR and human capital management leaders should read this report to understand the positioning of partners that will influence the implementation of the software they interact with on a regular basis as a critical part of their jobs.



This quadrant assesses services providers that offer implementation, migration and management of SAP workloads on Google Cloud. Providers are emphasizing **accelerators for SAP migrations and SAP-as-a-service consumption models.**

Mark Purdy

Definition

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

Eligibility Criteria

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

Observations

SAP migrations and management remain one of the complex areas of the IT modernization landscape, on any platform. This is also true on GCP, where offerings around SAP workloads are still relatively new. Only a few of the largest providers typically have the scale, resources and expertise to be a Leader in this quadrant. Providers in this space offer a range of services and solutions to ease the path to migration from SAP to GCP. These include rapid process discovery, roadmap creation, migration impact and rightsizing assessments. Leaders also typically offer automation capabilities and accelerators to speed up deployment, with some of these accelerators focusing on moving data workloads from existing data warehouses to integrate with Google BigQuery. Some providers are offering pre-built industry solutions for SAP on GCP. Providers are also shaping offerings to help enterprises move to cloud-based consumption models for SAP on GCP, for example, via Rise with SAP, SAP's software-as-a-service model that works on different public clouds.

From the 35 companies assessed for this study, 15 have qualified for this quadrant, with three being Leaders.

accenture

Accenture has decades of experience in SAP migration and brings an array of accelerators and machine learning capabilities to help enterprise clients gain greater insights and value from their SAP data on Google Cloud.

IBM

IBM has recently established Innovation Center for SAP Solutions in Germany and is also pioneering a series of services to help enterprise clients moving to RISE with SAP, the software-as-a-service consumption model for SAP.

TCS TATA CONSULTANCY SERVICES

TCS has a substantial SAP-on-Google-Cloud business in Europe, backed by certified professionals. It has invested in its s/4HANA Crystallus offering, providing preconfigured SAP on Google Cloud solutions for industries such as rail, semiconductors, medical technology and professional services. It offers ERP as a service on GCP through its TCS Sprint offering.

Workspace Services

Who Should Read This

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

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

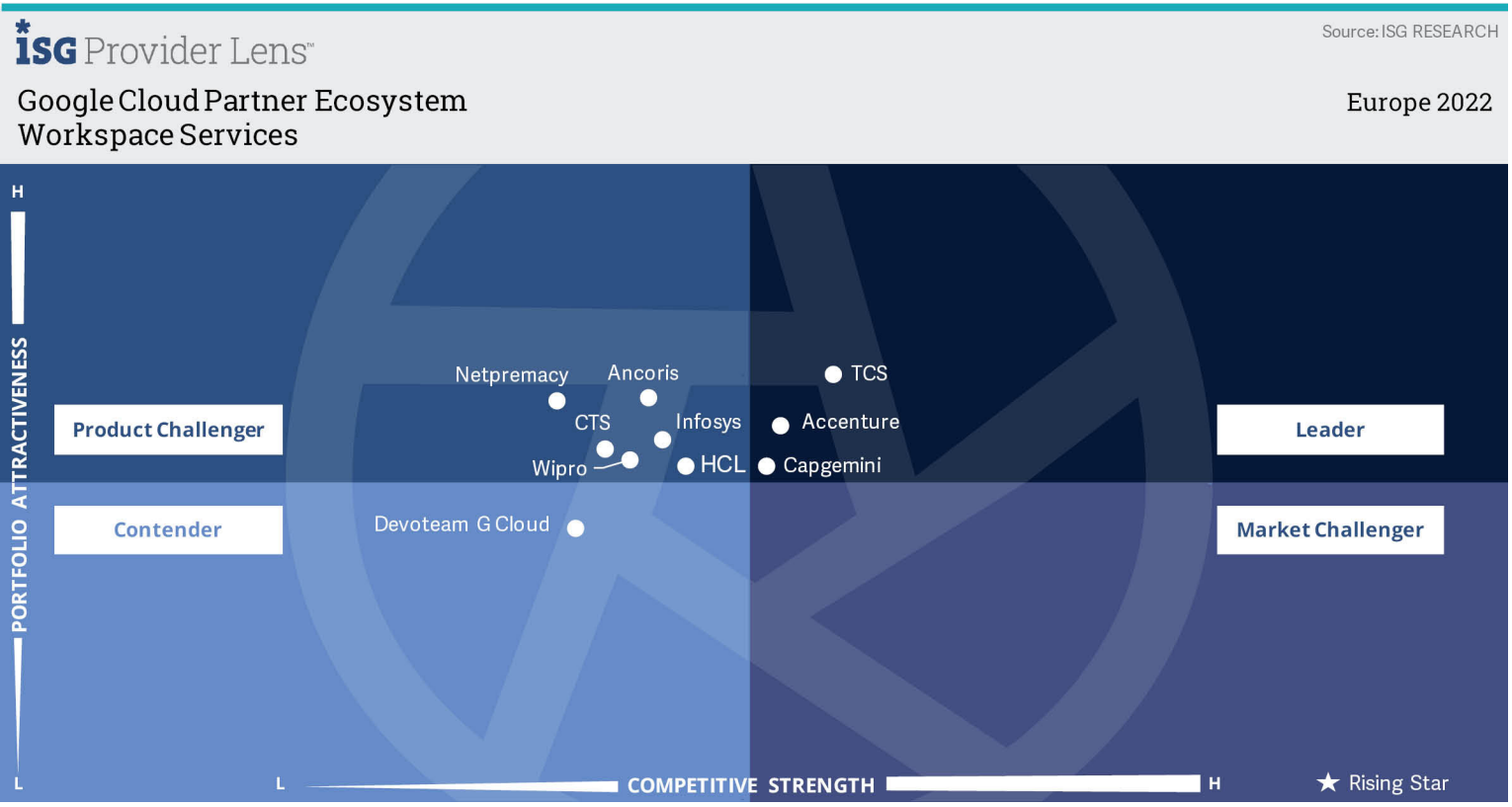
Google Workspace offers real-time collaboration while working on office documents and email features such as built-in spam, malware and phishing filters. New features in the Gmail UI bring core communication tools, such as chat, email, voice and video calling, into a single and unified experience.

Enterprises look forward to a unified experience where they can monitor and administer the whole gamut of Google Workspace. Providers should also possess experience in service ticket automation, AI-assisted bots, knowledge management and self-servicing.

IT leaders should read this report to understand the relative positioning and capabilities of partners that will help them effectively consume services from Google Cloud and understand how these providers' technical capabilities are compared with the rest of the market.

Software development and technology leaders should read this report to understand the positioning of managed service providers and how the providers' offerings can impact an enterprise's ongoing transformation initiatives, while identifying the benefits of moving to the cloud.

Workspace leaders should read this report to understand the provider ecosystem for Google Cloud workspace services in Europe and gain knowledge about how providers compare to one another.



This quadrant analyzes service providers that help enterprises integrate and manage Google Workspace's suite of collaboration/ productivity tools. Service providers are **helping enterprises move to modern, hybrid workplace models with the native tools on Google Workspace.**

Mark Purdy

Definition

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

Eligibility Criteria

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, using differentiated methodologies and frameworks for increasing the adoption of Workspace
3. Experience in **legacy migrations** to Workspace, especially from Lotus-Notes-based on-premises email systems
4. Demonstrate **advanced content analytics and data search** capabilities for company content across Workspace, as well as integration with external third-party data sources
5. **Administration, IT governance, and security services** for data workloads and modern end-point management
6. Offer services and frameworks to **accelerate low-code/ citizen developer activities** on Workspace and influence desired behaviors such as collaboration and data/code/content sharing
7. Provision of **organization-specific data analytics** and insights around Workspace, such as adoption rates, work patterns and collaboration

Observations

The pandemic-induced shift to remote and hybrid working models has increased the demand for services around Workspace, Google's suite of productivity/collaboration tools that emerged out of the G Suite productivity package. While the provider ecosystem around Workspace services is still at a nascent stage, with only a few leading providers having fully developed offerings, Workspace is getting attention from both providers and enterprises because of its ability to promote collaborative equity across environments such as home and work and consumer and business devices. While migrations to Workspace are still small compared to Teams, providers expect Workspace services to grow over the next few years, particularly because the younger generation of workers is already accustomed to using the Google Workspace tools in their day-to-day lives.

Migrations to Workspace typically take two forms: either greenfield integrations for digitally native companies that are not already aligned to a particular workplace platform or brownfield migrations for firms with legacy work communications systems (e.g., migrations from Lotus Notes). In the future, we can expect more hybrid models to emerge, such as integration of Workspace platforms with existing Teams deployments. Providers in this space offer various services ranging from consulting and advisory to technical integration and operations support, as well as change management support to spur the adoption of Workspace.

From the 18 companies assessed for this study, ten have qualified for this quadrant, with three being Leaders.

Accenture has acquired Wabion, a German-Swiss boutique provider offering a wide range of migration, consulting and training solutions for Google Cloud, including in the area of Workspace Services.

Capgemini's services help enterprises migrate to and manage G Suite, including consulting and advisory, technical development and change management. It has enabled large-scale migrations to Workspace for global clients such as Barry Callebaut, a Swiss-based chocolate company.

TCS has a substantial business for Workspace services in Europe, with many certified professionals. Its Digital Workplace offers services to support Workspace migration and management, including maturity assessment, data migration services, change management support and training services. It has experience driving Workspace migrations for major clients in Europe and beyond.

Appendix

Methodology & Team

The ISG Provider Lens 2022 – Google Cloud Partner Ecosystem 2022 analyzes the relevant software vendors/service providers in the Europe 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 programmes, 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 April 2022, 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 US 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. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
   * Strategy & vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

Lead Author

Mark Purdy
Principal Analyst

Mark Purdy is a Principal Analyst at ISG Provider Lens™ and brings over 25 years of experience working on economics and technology research in business and government. Mark has a focus on next-generation technologies, especially artificial intelligence and intelligent automation, digital twins, digital olfaction, machine learning, virtual reality, and edge computing. He is the author of several ISG Provider Lens™ studies, including the 2021 Container Solutions and Services study for Europe, and the 2021 Intelligent Automation studies for the UK and the Nordics. He has published widely in tier-1 media and business publications such as Harvard Business Review and Sloan Management Review. He speaks on economics and technology issues at conferences, client workshops and seminars around the world.

Research Analyst

Srinivasan PN
Senior Research Analyst

Srinivasan PN is a senior research analyst 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 the space of engineering services and digital transformation. Srinivasan comes with 8 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 each of his expertise areas. Along with this, he supports the advisors with his research skills and writes papers about latest market developments in the industry.

IPL Product Owner

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 analysing 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.

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ISG

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ISG Provider Lens™

JUNE 2022

REPORT: GOOGLE CLOUD PARTNER ECOSYSTEM