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 | U.S.

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Data and sustainability drive the Google ecosystem.

The advent of technology and infrastructure modernization drives virtualization led by hyperscalers, accelerating advanced capabilities and enhancing product portfolios. There is a healthy and smart competition among the top three hyperscalers, Google, Microsoft Azure and AWS, as they are uniquely well-positioned and have established their foothold in exclusive areas depending on products, services and capabilities. The specialization and expertise built across every portfolio among these top hyperscalers present unique capabilities and functionalities. Google has been the most innovative of all when it comes to start building cognitive platforms that are unique, and today, these platforms being widely used by the ecosystem. Google is a U.S. company and, has had multi-pronged benefits due to the inheritance, demographic and intelligence quotients that have been available across the country's technology community.

Google has been at the forefront of envisioning futuristic solutions that are technical and scientific. Among all the hyperscalers, Google is capable enough to incorporate advanced, feature-rich platforms that drive the inclusion and infusion of emerging technologies. The benefit of being a universal information repository has positioned it in a unique space. The construct of the ecosystem is an interesting setup that comprises many active entities that are inherently related and dependent on one another to expand the business value. The partnerships covering global service integrators (GSIs) bridge the gap between business

Google Cloud is driving **intelligent transformation**.

use cases and technology capabilities. Functionalities and advanced system integration capabilities are driven by independent software vendors, enabling customers to incorporate intelligent solutions. Consulting firms with deep industry expertise and thorough market understating recommend and implement collaborative solutions to ensure value co-creation. ISG's focus on the Google ecosystem to capture the unique operational connection highlights various characteristics of the providers that are part of this ecosystem across Data Analytics & Machine Learning, SAP Workloads, Workspace Services Implementation and Integration Services and Managed Services covered by the five quadrants.

The U.S. has been the epicenter of emerging technology-driven business transformation. Google aptly benefits from the technology community in Silicon Valley to continuously improve, ideate and innovate its product positioning. Increasing cloud adoption drives the U.S. market to inherently opt for a hyperscaler journey for critical technological, commercial and operational reasons that have proven outcomes over time. Large enterprises choose Google Cloud Platform (GCP) to take advantage of the core competencies around machine learning, data analytics, environmental sustainability, compute performance and inclination toward cloud-native architectures. These strengths and differentiators are drawing enterprises to the platform.

The significance of GCP in assisting firms with their sustainability objectives is one of its primary strengths. According to the information we received from providers, environmental performance has emerged as a primary concern for businesses over the past year, as they have been increasingly interested in moving their data operations to the public cloud from on-premises data centers. Despite significant gains in computing capacity, the hyperscalers' cloud services have made incredible advances in energy conservation. Google Cloud stands out for its attention to ecofriendly computing and its carbon-neutral data centers. In a larger sense, the capabilities that Google Cloud provides play an essential part in assisting business sectors in achieving their broader sustainability goals.

For illustration, providers can harness Google's Data Analytics and Machine Learning tools for the accurate carbon optimization of cloud usage to lower carbon footprints. Improved evaluation of the environmental, social and corporate governance (ESG) performance optimizes manufacturing processes to reduce energy and material consumption, improving the monitoring of sprawling supply chains. In addition, providers are making solutions for the workspace to encourage virtual and hybrid operations, which is also good for the environment and contributes to ESG goals.

Google has built its array of faculties on the core functionalities derived from the consumer market requirements and technological development. Google has developed access to an ocean of dynamic data generated from its consumer front-ending products, leading to untapped dimensions of human-machine behavior. This is the inception point for Google to conceptualize groundbreaking products and focus on innovations. Cloud platforms are the foundation of AI capabilities, where data is an inherent building block for the AI foundation powered by GCP. The big data (Google BigQuery) and analytics abilities on streaming data (Pub/Sub) from sources on GCP, supported by ETL (Dataflow) to run queries, cover the entire

metadata management services portfolio, creating usable training data sets. Google Auto Machine Learning models are prebuilt packages around language, vision and voice data processing to extract various characteristics. Google's strategy to build this connected ecosystem using software and hardware has given a unique advantage to building consumer-centric solutions that are real-time and ahead of time.

Turning to the SAP cloud strategy, SAP has refined its approach to meeting the market and enterprise client demand in managing mission-critical core systems. SAP has also started bundling and packaging its services and products under the SAP RISE platform, simplifying the adoption and onboarding of cloud infrastructure and licensing in this age of modularizing. GCP is the best-suited cloud to run SAP workloads due to the technologies and solutions it provides specific to the management and maintenance of SAP products. Google extends solutions for SAP, with high availability and zero downtime, unlike any traditional IT setup. The entire array supports unique services and features around networking to manage the client environment. GCP created flexibility, scalability and reliability for transformation. SAP is on the transformation path where GCP and SAP are in a coherent partnership to onboard the SAP platform and drive innovation using the plethora of products, models, capabilities and components that GCP extends. From our interactions and discussion with various GSIs and enterprise clients, we recognize that GCP is the partner of choice to migrate SAP and build a platform for long-term continuous innovation capability. SAP is among the top three ERP applications in the U.S. market and has significant coverage and clients across the region.

There is undoubtedly a strategic roadmap for strengthening the relationship between SAP and GCP, keeping growth, scale and business transformation for the coming years.

In addition to the above issues, we see some workforce trends related to Google. Workforces have adjusted to a hybrid mode of operation, particularly in small and midsize businesses. This is particularly true in the U.S. Google has moved quickly to assert its dominance in this market with the release of its Google Suite, which includes workspace tools and productivity apps. Google is now the next best option with a simple, agile and commercially viable option in this space. The Google Workspace suite is comprehensive for managing projects, communicating tools and collaborative features.

Google Workspace can obtain a wide range of functionalities, due to the advanced set of benefits that are provided by the vertical integration and horizontal interconnection of apps with other Google Cloud and hosted products. This is undoubtedly a new market for Google. However, the company's Workspace product will quickly become a worthy alternative to the only other option currently available in the market due to its growing popularity and applicability. It will be interesting to observe how Google positions its products and implements its workspace strategy to take the lead in the open market for workspaces.

Google has been at the forefront of envisioning futuristic solutions.

Provider Positioning

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	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
66 Degrees	Contender	Contender	Contender	Not In	Contender
Accenture	Leader	Leader	Leader	Leader	Leader
Atos	Market Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
Capgemini	Leader	Leader	Leader	Leader	Leader
Cloud Reach	Contender	Not In	Not In	Not In	Not In
Cloud4C	Not In	Not In	Not In	Not In	Product Challenger
Cognizant	Leader	Leader	Leader	Leader	Rising Star ★
Deloitte	Leader	Leader	Product Challenger	Leader	Not In
Devoteam G Cloud	Product Challenger	Not In	Product Challenger	Contender	Contender
DOiT	Not In	Contender	Not In	Not In	Not In

Provider Positioning

Page 2 of 3

	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
DXC Technology	Not In	Not In	Not In	Product Challenger	Not In
GFT	Contender	Product Challenger	Contender	Contender	Not In
Grid Dynamics	Contender	Contender	Not In	Not In	Product Challenger
HCL	Leader	Leader	Leader	Leader	Not In
IBM	Market Challenger	Market Challenger	Market Challenger	Market Challenger	Not In
Infosys	Leader	Leader	Leader	Leader	Leader
Kyndryl	Product Challenger	Not In	Product Challenger	Not In	Not In
LTI	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
Mindtree	Leader	Leader	Rising Star ★	Rising Star ★	Not In
Persistent Systems	Rising Star ★	Rising Star ★	Market Challenger	Not In	Not In

Provider Positioning

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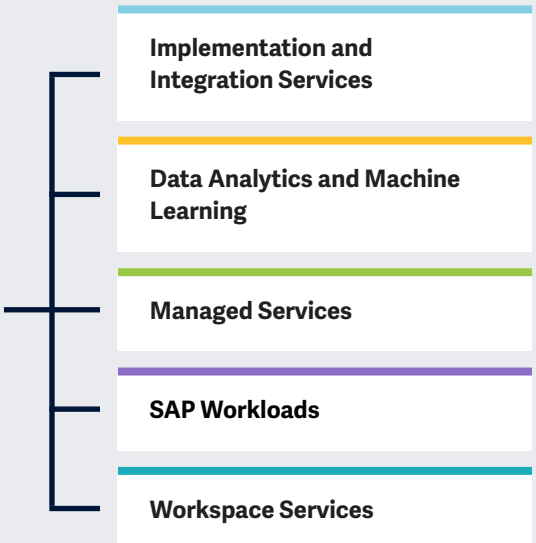
	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Quantiphi	Rising Star ★	Rising Star ★	Not In	Not In	Not In
Rackspace Technology	Leader	Not In	Leader	Product Challenger	Not In
SADA	Contender	Contender	Contender	Not In	Not In
Slalom	Contender	Contender	Not In	Not In	Not In
Softserve	Not In	Product Challenger	Not In	Not In	Not In
Sopra Steria	Contender	Not In	Not In	Not In	Not In
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Rising Star ★	Rising Star ★	Not In
T-Systems	Product Challenger	Not In	Product Challenger	Product Challenger	Not In
Wipro	Leader	Leader	Leader	Leader	Product Challenger

This study focuses on five key dimensions of the **emergent Google Cloud ecosystem**.



Simplified Illustration Source: ISG 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 in 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 independent software vendors, 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. Companies 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 digitalization are naturally levitating to Google as one of the key hyperscaler platforms, given its proven prowess in the AI technologies and algorithms space. They prefer service providers that have demonstrated capabilities in development, test and run services for GCP, and in AI/machine learning and big data applications in businesses. They are also looking for providers with a strong track record in delivery and ability to provide quality talent and trained and

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

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

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

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

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

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following five quadrants: 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:

- 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 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.

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 the U.S. 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 the U.S. 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.

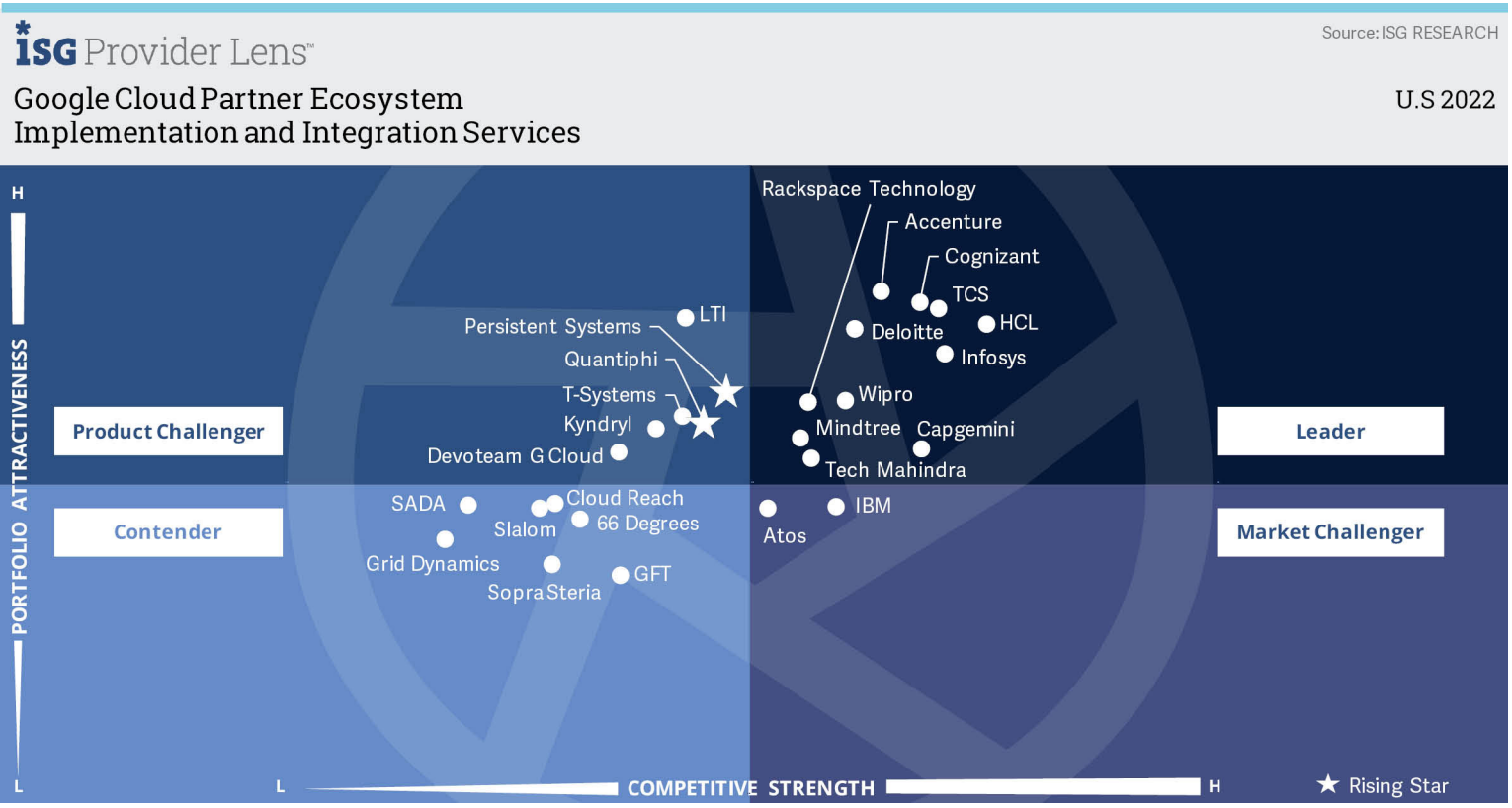
A growing number of enterprises are exploring the possibilities of moving workloads between hyperscalers to ensure a true multicloud architecture for better service delivery and security and to reduce costs. Along with this, enterprises are actively pursuing opportunities to control their cloud spending while realizing the promise of flexibility, on-demand consumption and innovation.

Enterprises explore partnerships with providers that have a global presence and deep talent expertise across the cloud ecosystem, particularly with Google Cloud Platform (GCP). Enterprises choose providers with better cost models, good delivery expertise and innovative environments for future development.

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.

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

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.



This quadrant looks at how service providers use GCP to help enterprises with their cloud migrations. These providers help businesses use the built-in features of GCP to get more business value and optimize operations.

Tapati Bandopadhyay

Definition

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

Eligibility Criteria

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

Business customers are switching to cloud-based solutions, driving the need for skilled workers who have experience and knowledge in implementation and integration services across hyperscalers. Service providers' strategies no longer focus on the most prominent hyperscaler, but they are trying to build a broad skillset across many technologies, such as Python and analytics. In addition to this, cloud management processes involve the improvisations of proprietary methodologies, frameworks and techniques that service providers have developed. The key differentiating factors are the proprietary components for deployments and integration and migration activities.

In response to the expansion of GCP, providers are setting up specialist Google Cloud business units, making investments in building the portfolio of accelerators for the platform and stepping up their efforts to get certified on the platform. As a result of this,

- Google is emerging as a preferred cloud platform to capitalize on this trend by adding new capabilities such as Google Anthos to manage GKE clusters and workloads on virtual machines across environments.
- Service providers have started investing heavily in research and development to co-build and co-create solutions. These partnerships are strategic and collaborative in building industry-specific intelligent solutions using Google's AI-machine learning platform.
- Building a resources pool with expertise and experience in driving implementation projects is the top priority. As GCP is more of a developer- and development-centric platform presenting innovation opportunities, the skill level required is unique and elevated compared to the other players in the market.

From the 55 companies assessed for this study, 26 have qualified for this quadrant, with 11 being Leaders and two Rising Stars.

accenture

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

Capgemini

Capgemini's GCP services and offers utilize environmental, sustainability and green activities. This enables clients to transition carbon sensitively to Google Cloud for computing, data, storage and analytics.

cognizant

Cognizant has set up its own 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.

Deloitte

Deloitte is a prominent Google Cloud partner in the U.S., given its client network and knowledge. In addition, its cloud consulting knowledge makes it a desirable cloud journey partner for complicated digital transformation undertakings.

HCL offers a rich suite of accelerators on GCP, 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 London, Dallas and India.

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 U.S and has invested heavily in a range of industry and point solutions for the platform.

Mindtree offers unique talent advantages for its clients in the U.S. market, for specialized Google and multicloud implementation and transformation programs. Mindtree Minds take a consultative, digital-native approach toward Google Cloud implementations.

Rackspace Technology

Rackspace Technology has been building 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 many enterprises in the U.S.

TCS has 10 specializations on Google Cloud and different expertise designations. Being 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 the U.S.

Tech Mahindra excels in the delivery of focused business outcomes for GCP implementations and data analytics solutions, especially for certain verticals like telecom and manufacturing, where it has comprehensive capabilities and a strong reusable knowledge base.

Wipro has utilized its cloud infrastructure deployment and management skills and strong foundations in software engineering, corporate systems and applications and data analytics to develop integrated service solutions on GCP.

Persistent Systems

Persistent Systems, a Rising Star, has proven excellence in putting advanced digital technology stacks from Google Cloud into complex engineering use cases for mid to large clients worldwide. Their strengths in digital engineering and the quality of their design and service delivery make them a highly sought-after partner.

Quantiphi

Quantiphi, also a Rising Star, is one of the early innovation partners for Google Cloud data analytics and machine learning capabilities. Given these capabilities are among the strongest hyperscaler offerings that Google is known for, Quantiphi's position in the U.S. market is expected to improve considerably.

Leader

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

Tapati Bandopadhyay

Cognizant

Overview

Cognizant is headquartered in New Jersey and operates in 41 countries. It has over 330,600 employees across 162 global offices. In FY21, the company generated $18.5 billion (+11.1 percent YoY) in revenue, with financial services as its largest segment. It 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 certifications, including Cloud Migration – Services.

Strengths

Award-winning GCP partner: Acknowledging Cognizant's commitment and talent strengths in the partnership, Google named it Google Cloud Breakthrough Partner of the Year in several regions across the globe during 2020-21.

Industry-first approach: The Cognizant Google Cloud Business Group accelerates cloud transformation, optimizes experiences and drives client outcomes.

Strong strategic focus on Google: With its dedicated Google Business Group, Cognizant has made strategic acquisitions, such as Servian (a AI/cloud company) and Contino (a cloud-native specialist). Cognizant is also ramping up its investments in skills and capabilities on Google Cloud, with a large number of certifications. About 30 percent of its talent base focuses on infrastructure that is critical for complex implementation and integration projects.

Compelling credentials: Cognizant has carried out complex migration and integration projects for large, complex clients across verticals such as banking and financial services in the U.S.

Caution

The Google Cloud migration- and implementation-related consulting capabilities are increasingly being sought after on the basis of the domain knowledge, expertise and certification of the workforce, rather than pure tech know-how. Therefore, consulting-focused partners are emerging as winners in the U.S. market. Cognizant's industry-first approach needs to be storyboarded much more aggressively and visibly to counter this competitive threat.

Data Analytics and Machine Learning

Who Should Read This

This report is relevant to enterprises across industries in the U.S. for evaluating providers of data analytics and machine learning services. In this quadrant, ISG highlights the current market positioning of providers in the U.S. and how they can address the key challenges faced by enterprises.

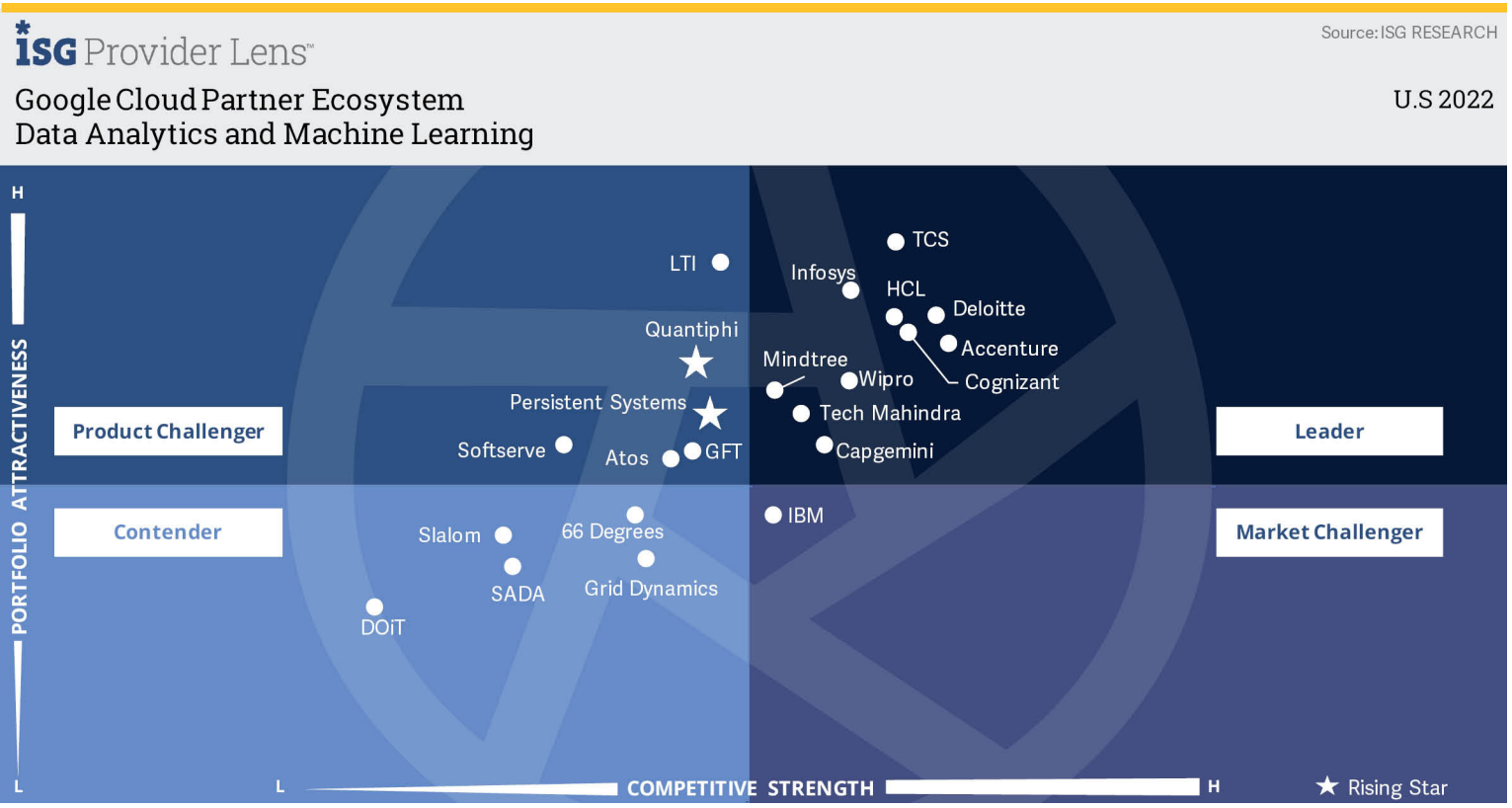
There is a growing interest in new data architectural paradigms, such as a data mesh or a data lake house, as organizations work on independently extensible and composable applications to address new business opportunities. Apart from this, machine learning for operations (MLOps) and DataOps practices are gaining prominence, as organizations are developing more machine learning and AI models for purposes such as controlling model drift and keeping models updated for business value.

Enterprises expect their service partners to have an expansive portfolio of data analytics and machine learning. Enterprises choose GCP over other hyperscalers for data analytics workloads, as it offers better data-related services. Hence, providers with GCP accreditation for data analytics, with a few case studies, will be in demand when enterprises choose providers for a service partnership.

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 the U.S. and gain knowledge about how providers compare to one another.



This quadrant evaluates the providers of data analytics and machine learning solutions. Google Cloud extends a broad range of AI-driven tools, including analytics and machine learning capabilities, enhancing data architecture models.

Tapati Bandopadhyay

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 and extended reality applications and IoT. In addition, foundational capabilities in big data and machine learning on the GCP should be demonstrated at scale, such as using CloudSQL, Cloud Dataproc, BigQuery, Cloud Datalab and Datastore, running and developing solutions/services on the migrated workloads from MySQL and Hadoop/Spark/Hive on GCP.

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 skill 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, roadmaps 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

Google Cloud stands in an excellent position to benefit from the second rising wave of cloud computing because it provides a broad array of cloud-native tools and capabilities. Data warehousing, analytics and machine learning are the most prominent and mature offerings with assured results and striking differentiations. In addition, to accomplish business outcomes, enterprises are increasingly interested in moving beyond single hyperscalers, toward an authentic multicloud architecture.

Data and machine learning are the fundamental pillars around which Google Cloud is built. When migrating workloads to Google Cloud, businesses often want to free up data inside their organizations to make better decisions and generate more business value with the data they have at their disposal.

- The highly flexible and modular characteristics of Google Cloud and its expansive range of AI-driven tools make it an ideal platform for enterprises to drive transformation. As businesses move away from conventional data management practices and frameworks. We have seen developments and enhancements in the data architecture models.
- With the data analytics and machine learning (DAML) functionalities offered by Google Cloud, service providers are building various focused solutions addressing functional and business challenges. Industries such as manufacturing, healthcare and banking and insurance have many use cases for machine vision or conversational AI driving intelligent operations.
- Organizations have stated working on a data strategy to build unique insights through the hybrid approach of hosting business systems. The data points generated during every Business-Information-Technology (BIT) transaction, when coupled, present a unique dimension, which is possible through the AI-machine learning tools portfolio made available on GCP.

From the 50 companies assessed for this study, 22 have qualified for this quadrant, with 10 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. It is also targeting the intelligent marketing sector through its customer data architecture that provides a 360-degree view of a customer.

Capgemini

Capgemini has merged its GCP technical capabilities with its domain consulting skills and unique solution framework and architecture. It designs and develops cloud transformation and migration services using Google Cloud. Clients get a comprehensive set of offerings due to this integrative approach.

cognizant

Cognizant is seen as a key cloud transformation partner in the U.S. market by several midsize and large client organizations. Its focused partnership and co-development skills on GCP make it an ideal choice in the region.

Deloitte

Deloitte is a well-known Google Cloud partner in the U.S. market, with its extensive customer base and industry knowledge. Data analytics, AI, and machine learning from Google Cloud are used by Deloitte to enhance the experience of consumers, workers and partners in the corporate world.

HCL offers many 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 extensive talent in GCP-related data and analytics solutions in the U.S market.

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

Mindtree has exclusive expertise and experience in specialized Google and multicloud implementation and transformation programs in the U.S. market. It is successful in leveraging analytics for business insights using GCP's technology.

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 in implementing data and machine learning solutions for a range of major global brands in U.S and beyond.

Tech Mahindra, 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 offers a key point of differentiation.

Wipro has leveraged its cloud infrastructure deployment and management capabilities as well as its strong foundation in software engineering, enterprise systems and applications and data analytics to deliver integrative service offerings on GCP.

Quantiphi

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

Persistent Systems

Rising Star **Persistent Systems**' enterprise data as a service helps design the data strategy roadmap, deploy a contemporary cloud data stack, build governance and security frameworks and manage data quality utilizing modern data mesh and operations concepts. Its data science expertise may assist companies in optimizing business processes with AI and machine learning.

Leader

"Cognizant's data modernization helps make use of enterprise dark data, making it a Leader in DAML."

Tapati Bandopadhyay

Cognizant

Overview

Cognizant is headquartered in New Jersey and operates in 41 countries. It has over 330,600 employees across 162 global offices. In FY21, the company generated $18.5 billion (+11.1 percent YoY) in revenue, with financial services as its largest segment. It has eight Google Partner specializations and expertise certifications and was Google Breakthrough Partner of the Year for Europe, Middle East and Africa in 2020.

Strengths

Frameworks for data-driven innovation: With mature data-leveraging frameworks, such as cloud-first, AI-driven Adaptive Data Foundation, and data ecosystems across data lakes and hypercubes, Cognizant has proven credentials in data modernization and analytics projects for blue-chip clients in the U.S. These projects include the implementation of enterprise data migration to GCP even for highly regulated and compliance-heavy sectors, such as banking, financial services and insurance.

Innovation focus: Aside from the data practice, Cognizant has focused on digital innovation in financial services and other complex, high-risk, high-return sectors, especially in sync with the changing market dynamics in the post-pandemic era. This has been possible due to its focus on cutting-edge research to create innovative industry solutions.

Caution

Disruptive, value-driven storyboarding can affect Cognizant's market visibility in terms of GCP DAML skills in the U.S. market.

Managed Services

Who Should Read This

This report is relevant to enterprises across industries in the U.S. for evaluating providers of Google Cloud managed services. In this quadrant, ISG highlights the current market positioning of these providers in the U.S. and how they address the key challenges of 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.

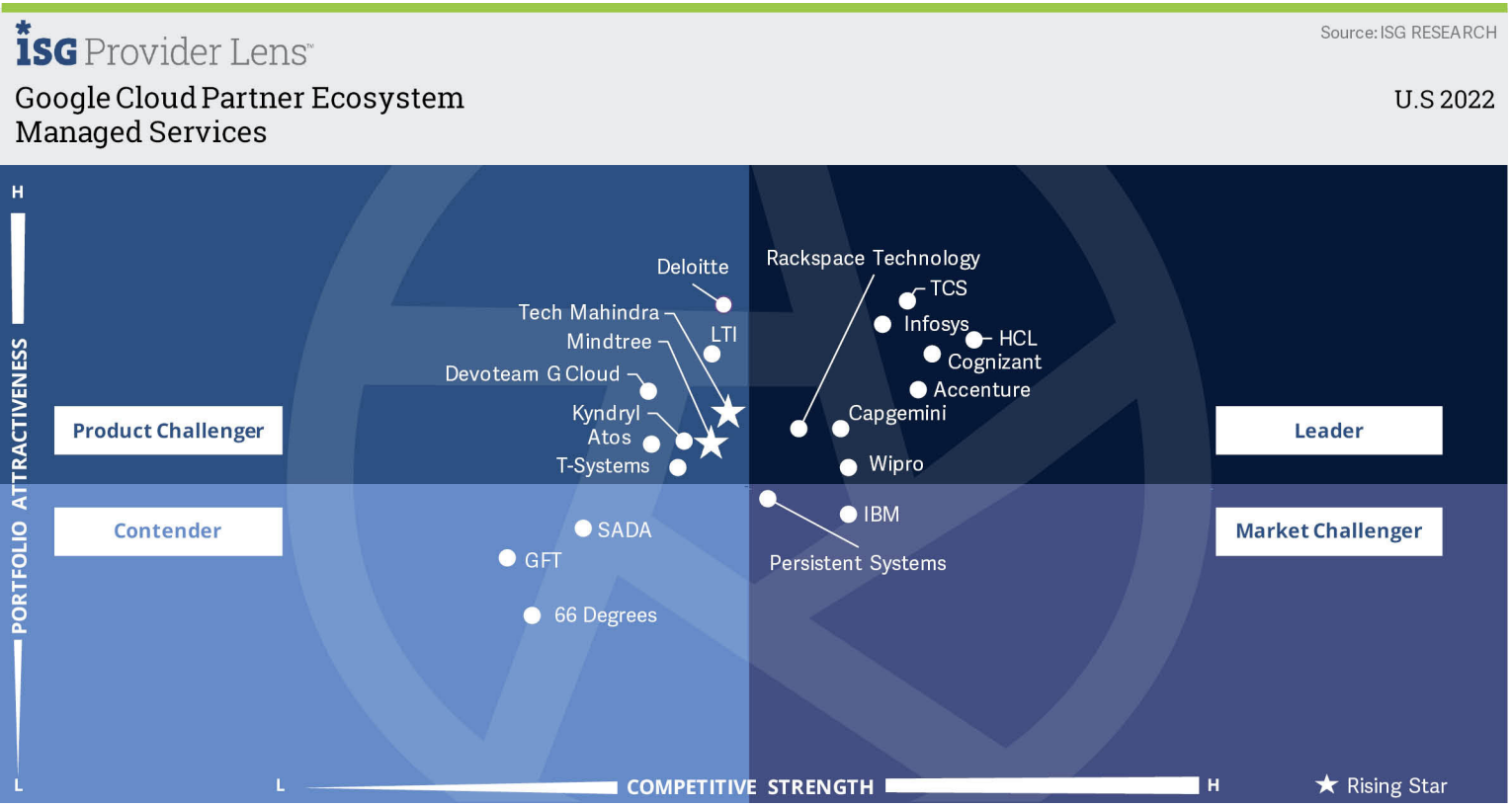
Enterprises are acknowledging the need for multicloud adoption to reduce their dependency on one cloud provider and to avoid lock-ins. Business leaders are adopting a more favorable view of cloud adoption and are joining their IT counterparts in recognizing the opportunity cloud presents for driving top-line growth. Enterprises are concerned about sprawl in cloud environments and are looking for solutions to manage flexibility and the controlled expansion of their cloud footprints.

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.

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

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.



This quadrant ranks service providers that provide managed services on GCP. As part of their managed service solutions, providers focus on new capabilities, automation, digital engineering and building new partnerships.

Tapati Bandopadhyay

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. These 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 the 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 and cloud-native and legacy system** integration
3. Experience in implementing both **agile and DevOps**, as well as 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

Service providers are keen on building partnerships with the ecosystem that supports managing and maintaining the cloud infrastructure. Their offerings include niche products that monitor an environment and data security and information management attributes that secure the enterprise perimeter. This is possible through a well-positioned partnership strategy with Google and its supporting ecosystem that supports the entire backbone of the enterprise.

The partnership tiers, depth and type matter, as Google must manage them depending on the outcome, contribution and end product. These are important for Google to drive the penetration and adoption of GCP while critical for providers to build credibility and confidence with their enterprise clientele.

- Talent partnerships with educational institutions and non-conventional open communities are on the rise. This is proving to be a practical resource catchment strategy for niche technologies helping businesses scale on demand. Providers are creating roles and teams aligned with technologies that attract talent.
- One of the most crucial parts of managing services is to sustain operations and handle exceptions and events encountered during standard operating activities. There is a scarcity of experienced resources to address complex issues and resolve critical business challenges at all competency levels. The next crucial maintenance aspect that needs expertise is to infuse controlled changes to retain optimum performance.

From the 49 companies assessed for this study, 22 have qualified for this quadrant, with seven being Leaders and two Rising Stars.

Accenture has many professionals trained on Google Cloud, and it has won the Google Cloud Partner award 13 times. It stands out for its hybrid/multicloud solutions on Google Cloud and has been among the early partners for Google Anthos. It also developed more than 15 industry solutions for Google Cloud for specific needs.

Capgemini assists businesses in taking the next step with apps, platforms and transformation utilizing Google's innovative technologies. Extensive industry expertise, coupled with Google Cloud services, enables businesses to adopt unique solutions.

Cognizant has many certified professionals for GCP. It emphasizes an industry-first approach to Google Cloud, with an array of new use cases in areas such as healthcare, sustainability and banking, financial services and insurance.

HCL has a strong workforce that is certified on GCP and dedicated to addressing complex tasks like SAP migration and other end-to-end cloud management. It has deep expertise and industry knowledge.

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

Rackspace Technology

Rackspace Technology, is providing multicloud solutions on GCP through its Elastic Engineering approach. Its highly adaptable and scalable managed services are supported by pods of dedicated experts that can be quickly drawn upon for on-going infrastructure and DevOps support.

TCS has a wide array of specializations and expertise designations on Google Cloud. In 2020, it won Google Breakthrough Partner of the Year. It is investing in industry solutions for GCP and is providing multicloud orchestration via Google Anthos as part of its Enterprise Reliability Services offering.

Wipro has deployed and managed cloud infrastructure using its software engineering, enterprise system and applications expertise. It moves application workloads to GCP and applies cloud techniques to design and deploy cloud-native apps.

Mindtree provides a comprehensive range of Google Cloud services, including big data, big query and data science. These services are agile and inventive. The adoption of Google Cloud services in a consultative and digital-native manner is enabled by the Mindtree Minds team.

Tech Mahindra has established a Google Cloud practice consisting of advisory services for evaluating the transfer of workloads, including SAP to Google Cloud, managed services for delivering continuing services and domain solutions based on next-gen technologies, such as IoT, analytics and AI and machine learning.

Leader

"Cognizant leads in Google Cloud adoption strategies, with a business-case-led consultative approach."

Tapati Bandopadhyay

Cognizant

Overview

Cognizant is headquartered in New Jersey and operates in 41 countries. It has over 330,600 employees across 162 global offices. In FY21, the company generated $18.5 billion (+11.1 percent YoY) in revenue, with financial services as its largest segment. 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, including Infrastructure – Services and Application Development – Services.

Strengths

Business-case-led consultative approach: Cognizant applies a consulting approach based on business cases to assist enterprise clients in strategizing and planning the Google Cloud adoption roadmap. The strategy and templates offered by the proprietary framework for planning and executing large-scale infrastructure and application migration to the cloud, such as Cloud Steps, are distinctive difference.

Hybrid cloud offering portfolio: Cognizant has built a comprehensive set of offerings to support clients diverse cloud requirements. Hybrid Cloud Core integrates multiple hyperscalers, and the cloud management platform offers self-service capabilities.

Strong security practice: Cognizant's security practice meets the regulatory compliance demands of enterprises via extremely flexible advisory, transformation and BAU (Business As Usual) services. GCP cloud security architecture blueprints are suited for various regulatory and industry needs. Compute, GKE, BigQuery and Storage are examples of Google Cloud managed services. Cognizant also provides SIEM integration and cloud monitoring.

Caution

Cognizant's bundled solutions and frameworks for cloud managed services on GCP must be spoken about and showcased more aggressively and exhaustively across all available platforms in the U.S. market.

SAP Workloads

Who Should Read This

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

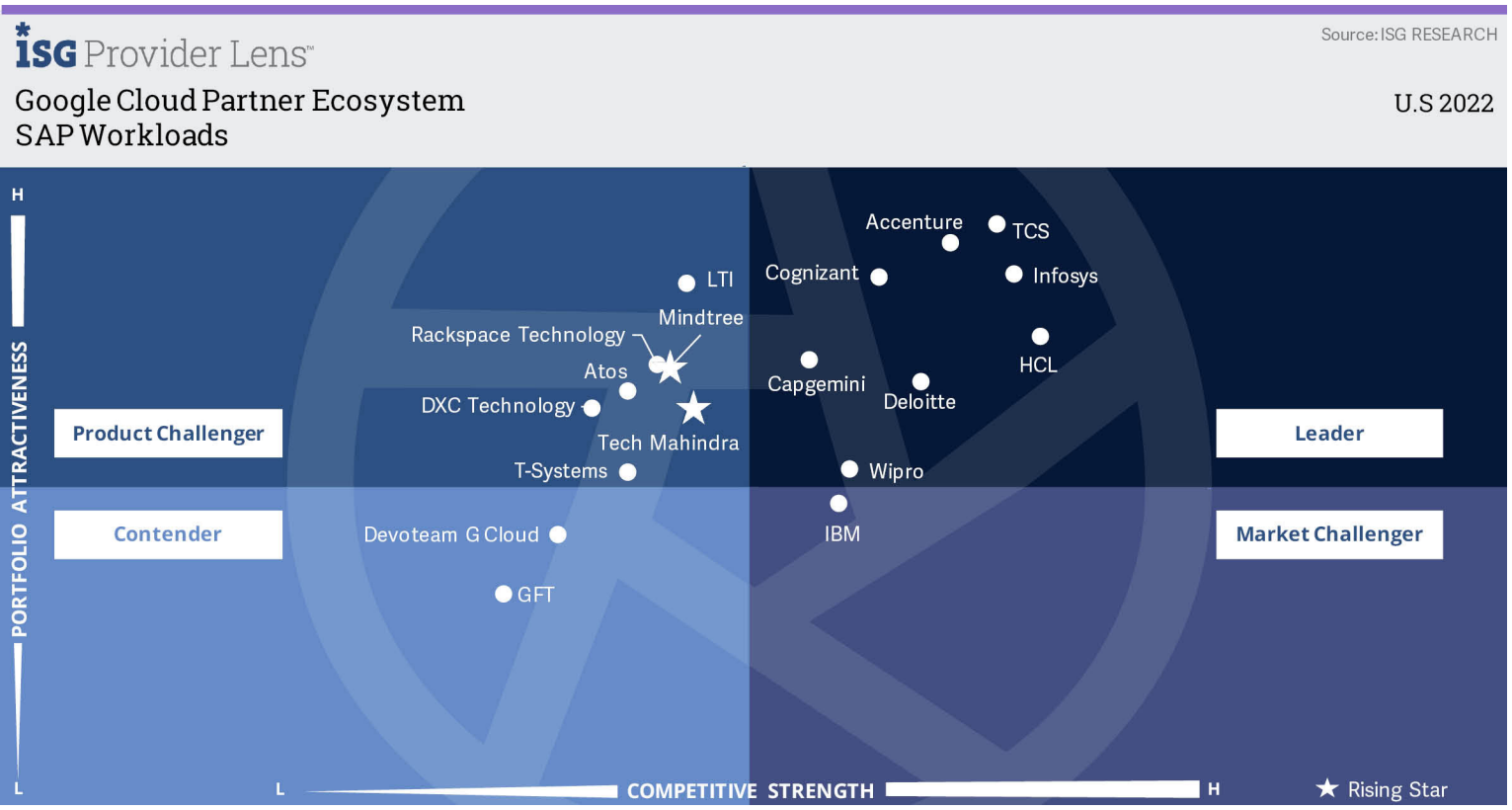
In this quadrant, ISG highlights the current market positioning of providers of SAP implementation and integration services on Google Cloud in the U.S. and how providers address the key challenges faced by enterprises. In the past few years, the implementation of SAP S/4HANA has been one of the critical milestones, either as a greenfield or brownfield implementation.

Enterprises running critical workloads expect their providers to ensure operational resilience, boost innovation and enhance their sustainability commitments. Large enterprises planning for a greenfield or brownfield implementation of SAP systems on the GCP environment partner with providers that have extensive expertise in GCP and SAP ecosystems, along with top-notch talent ecosystems and delivery models that should offer better pricing models.

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

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.

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



This quadrant assesses providers' capability to provide support, services and solutions for SAP products hosted on Google Cloud. SAP and Google continuously innovate and enhance their integrations to meet the market demand.

Tapati Bandopadhyay

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

Google Cloud's alliance with SAP provides SAP-certified infrastructure for SAP-related systems. Google Cloud is a best-suited platform for optimum results to power SAP cloud products such as S/4HANA Cloud, SAP and SAP HANA Enterprise Cloud. Google Cloud can help both big and small businesses make creative use of SAP data while improving the reliability, security and cost-effectiveness of SAP applications. Google Cloud is an excellent resource for anybody in charge of mission-critical SAP applications. Google Cloud collaborates closely with SAP to provide superior performance and dependability for all SAP products. The bring-your-own-license (BYOL) model requires an enterprise to get SAP software licenses from SAP or an SAP reseller and verify that it complies with SAP's licensing terms and agreements. SAP software licenses are not available via Google Cloud.

SAP drives certification programs to build and develop SAP expertise, which are being utilized effectively by providers. These solutions span across SAP HANA on GCP and corresponding SAP solutions, databases, operating systems and machine types. A rise in certification for SAP in the recent past depicts its strengthened partnership with GCP.

From the 42 companies assessed for this study, 18 have qualified for this quadrant, with eight being Leaders and two Rising Stars

accenture

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

Capgemini

Capgemini and Google Cloud help enterprises adapt to a changing environment, innovate for future growth and handle economic shifts. Capgemini is one of the largest and most experienced SAP integrators, with its comprehensive experience in designing, deploying and managing large SAP projects.

cognizant

Cognizant is considered a critical cloud transformation partner by several clients. Its GCP partnership and co-development talent make its a regional leader. With its experience in big databases, network connection and other SAP cloud migration elements, clients can expedite ROI, minimize downtime and transfer S/4HANA digital core to the cloud.

Deloitte

Deloitte and GCP offer a one-click deployment solution for an integrated platform that integrates SAP and other business data sources. Deloitte offers a solution that is instantly deployable and can help clients speed up the change.

HCL

HCL is the leading innovation partner for SAP in the areas of blockchain, IoT, machine learning, Intelligent RPA and conversational AI. HCL and SAP have collaborated to create a lab environment to help enterprises transform SAP portfolio utilizing a cloud-native approach.

Infosys delivers end-to-end SAP consultation, installation and maintenance. Its extensive industrial domain knowledge, patented processes, frameworks and SAP-certified tools and accelerators speed up digital transformation. Infosys Cobalt allows customers to engage in innovation and build intelligent organizations.

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

Wipro has created tool kits that clients may use to migrate their SAP workloads to Google Cloud. Wipro's priority is business, followed by a design-led approach. Wipro has an edge in the market due to its extensive verticalized and service-line expertise.

Rising Star **Mindtree's** SAP services are powered by its ability to create new solutions and manage domains/projects. It helps businesses change and improve their business performance. Mindtree is investing in new areas of SAP, such as mobility, solution manager, BO and HANA, to keep up with changing customer needs.

Rising Star **Tech Mahindra** has Google Cloud SAP expertise. Tech Mahindra and Google Cloud help organizations move difficult workloads. Tech Mahindra offers full public cloud migration services, including SAP HANA or S/4HANA upgrades.

Leader

"With its use-case story line approach, Cognizant is a Leader in SAP services for Google Cloud."

Tapati Bandopadhyay

Cognizant

Overview

Cognizant is headquartered in New Jersey and operates in 41 countries. As a service provider, it has over 330,600 employees across 162 global offices. In FY21, the company generated $18.5 billion (+11.1 percent YoY) in revenue, with financial services as its largest segment. It has eight Google Partner specializations and expertise certifications and was Google Breakthrough Partner of the Year for Europe, Middle East and Africa in 2020.

Strengths

Benchmarked industry standards: Cognizant delivers SAP-on-GCP services in a measurable, demonstrated and benchmarked manner across clients from different industry verticals. Its focus is on accelerating clients' business process transformation and modernization, while retaining service continuity and security, ensuring smooth cloud transitions for critical SAP workloads.

Use case story line: Cognizant's SAP-on-GCP and multicloud migration strategy is uniquely differentiated by its starting point with customer landscape analysis and assessments, with a feasible and value-focused use-case story line approach.

Caution

Cognizant must better communicate its unique business modernization strategies and use case story line approach to SAP on GCP in the U.S. market.

Workspace Services

Who Should Read This

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

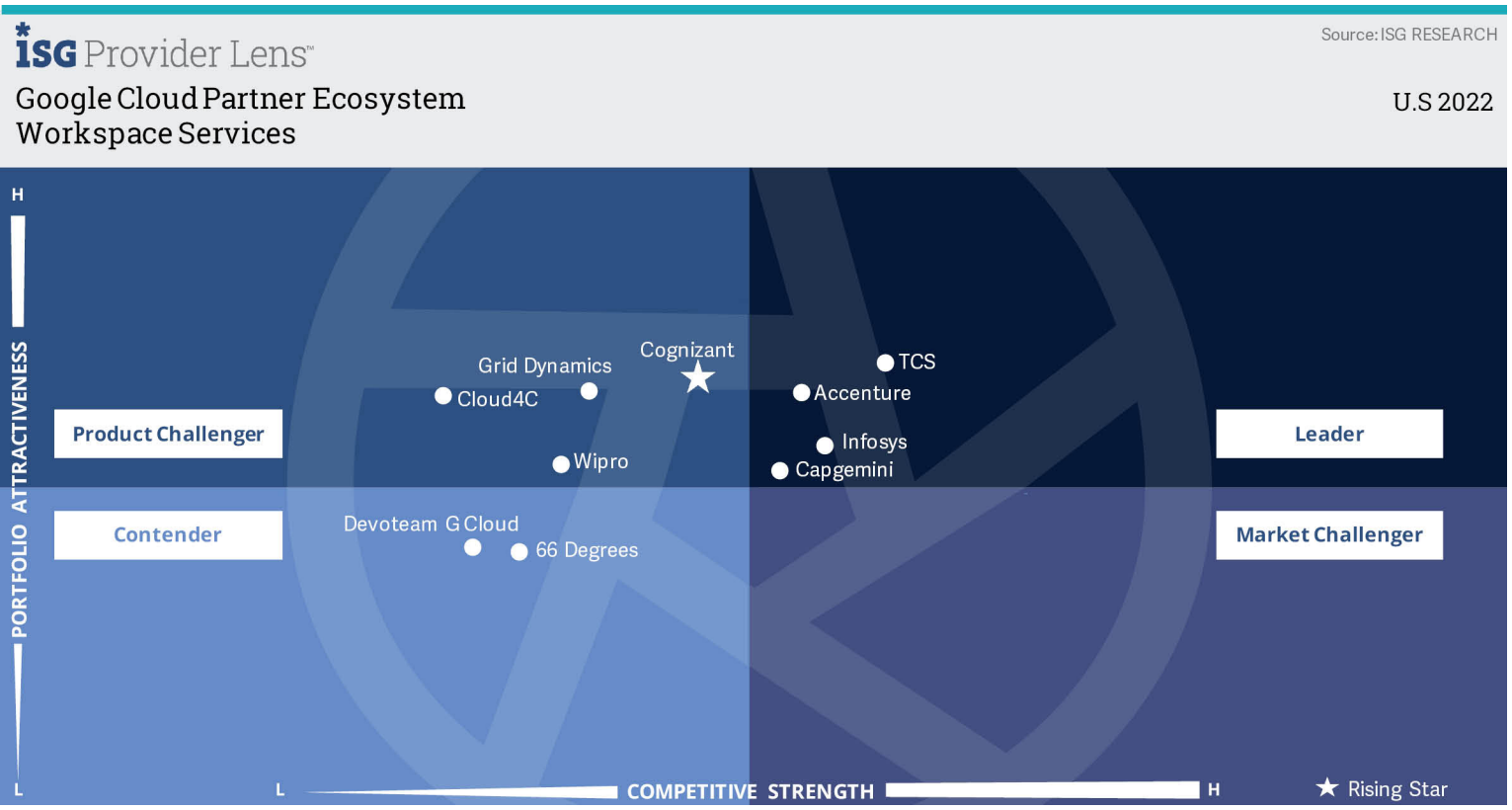
In this quadrant, ISG highlights the current market positioning of Google Cloud providers in the U.S. and how they address the key challenges in the region. Our assessment is based on the depth and breadth of providers' service offerings and market presence.

Enterprises are considering workspace services with three priorities, flexibility, enhanced collaboration and immersive experience, as the hybrid work model is considered to be the future. As most organizations have shifted their work culture to both remote and in-person models, there is a need for more secure collaboration, with cost-effective solutions. As Google Workspace offers better customer experience, customers from various verticals are choosing to adopt Google Workspace Services by partnering with a provider that can offer better Workspace services.

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 the U.S. and gain knowledge about how providers compare to one another.



This quadrant assesses the service providers that assist businesses in adopting and managing the collaboration and productivity products offered by Google Workspace. These service providers help organizations in migrating from traditional to hybrid workplace models.

Tapati Bandopadhyay

Definition

This quadrant assesses global systems integrators 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 aid 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 endpoint management
6. Offer services and frameworks to accelerate **low-code and citizen developer activities** on Workspace and influence desired behaviors such as collaboration and data, code and content sharing
7. Provision of organization-specific **data analytics and insights around Workspace** such as **adoption rates, patterns of working and collaboration**

Observations

Inherent work management solutions have always been a part of the Google ecosystem's offerings. Google is driving the future-of-work models through the offerings of Google Workspace. An easy-to-use productivity suite is critical in today's dynamic digital workplace for successful communication and collaboration. The demands of new times and new workforces are driving how workspace solutions transform over time. These solutions are already advanced and have quickly adapted to the sudden shift in the work culture. However, this is not the end of it, because there are many capabilities in trial and prototyping to fit the use cases of future. In the choice of products for professional work and compatibility, Google is well positioned to capture a certain set of enterprise audience. System integration, migration and adoptability of users are always a preference retained by the consumer community.

- Security is the top priority for all enterprises to ensure the integrity and confidentiality of proprietary and customer information restored during business. Hence, workspace platform providers are building proprietary security software to meet the market demand.
- Infusing intelligence in the office work suite can help increase the productivity and experience of users. Inference engines, language translations and sentiment analysis are a few valuable functionalities that are witnessing an increase in adoption and popularity.
- The Google Workspace suite is popular among small and midsize businesses for various reasons. The commercial aspect is one of the top three reasons, followed by the simple interface and ease of installation.

From the 23 companies assessed for this study, 10 have qualified for this quadrant, with four Leaders and one Rising star.

accenture

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

Capgemini offers a broad suite of services to 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 chocolate company.

cognizant

Cognizant, a Rising Star, provides a vast array of Google Workspace services to improve employee productivity. In addition, Google's best practices are exercised for the standard and flawless implementation of workspace tools, ensuring security.

TCS has substantial business for its Workspace services in the U.S., as well as a large base of certified professionals for the platform in the region. It offers a range of services to support Workspace migration and management, including maturity assessment, data migration services, change management support and training services.

Infosys has a robust partner ecosystem to support the digital workplace and automation framework, as well as an emerging innovation network with firms to develop next-generation capabilities.

Cognizant

Rising Star

"Cognizant offers WorkNEXT Cloud Workspace solutions across hybrid cloud platforms."

Tapati Bandopadhyay

Overview

Cognizant is headquartered in New Jersey and operates in 41 countries. It has over 330,600 employees across 162 global offices. In FY21, the company generated $18.5 billion (+11.1 percent YoY) in revenue, with financial services as its largest segment. It has eight Google Partner specializations and expertise certifications and was Google Breakthrough Partner of the Year for Europe, Middle East and Africa in 2020.

Strengths

Innovation-first workspace: Cognizant offers innovation-focused workspace solutions and services across multicloud platforms for clients, leveraging GCP assets and utilizing Google Workspace and Cloud Identity Subprocessors wherever applicable and relevant.

Domain-aware workspace solutions: Cognizant is uniquely positioned to offer domain-aware GCP workspace solutions to clients across industries. It has analyzed and realized early that workspace adoption roadmaps and priorities vary drastically between verticals due to different workloads, behaviors, expectations, performance metrics and business process realities.

Caution

Given the newness of GCP workspace services, Cognizant must attract clients in the U.S. market with its unique narrative of WorkNEXT and domain focus. This will require extensive, industry-defining thought leadership and partnerships.

Appendix

Methodology & Team

The ISG Provider Lens 2022 – Google Cloud Partner Ecosystem research study analyzes the relevant software vendors/ service providers in the U.S. 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 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 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

Tapati Bandopadhyay
Lead Analyst, US

Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 25+ years. She has been a global practice leader and executive-level advisor & consultant, in AI-automation-cloud and services management, covering MLOps, AIOps, CloudOps, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and story-telling practices and tools. As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens branded research projects, for the US market.

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 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.

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ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.For more information, visit www.isg-one.com.

ISG Provider Lens™

JUNE 2022

REPORT: GOOGLE CLOUD PARTNER ECOSYSTEM