ISG Provider Lens™

Google Cloud
Partner Ecosystem

A research report comparing strengths
and advantages of Google Cloud partners

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Google Cloud is one of the world's most prominent public cloud and technology providers. The technology giant's capabilities and services have evolved rapidly in recent years, with Google Cloud supporting the data workloads and applications of several leading enterprises. It has significantly advanced application modernization by developing Kubernetes, an open-source container orchestration platform. It has also pioneered developments, tools and assets in data analytics and machine learning.
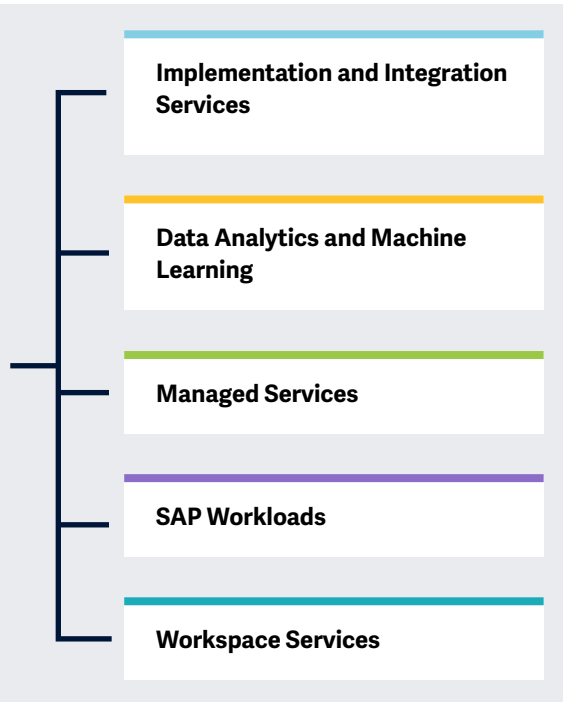
Despite these advances, many enterprises struggle to fully integrate the Google Cloud suite of technologies and capitalize on the platform's rich native tools and features. They therefore seek assistance from the ecosystem surrounding Google Cloud, a community of global system integrators (GSIs), IT-managed service and consulting providers and ISVs. These providers have many capabilities and specializations, including migration and implementation, licensing and cost management, governance and security, application development, machine learning, automation and citizen development.

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

Key focus areas for Google Cloud Ecosystem 2023.

Simplified Illustration Source: ISG 2023

Implementation and Integration Services

Data Analytics and Machine Learning

Managed Services

SAP Workloads

Workspace Services

The ISG Provider Lens™ Google Cloud Ecosystem 2023 report offers the following to business and IT decision makers:

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

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

Implementation and Integration Services

Definition

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

Eligibility Criteria

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

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

3. Experience in **authentication and access management** technologies

4. Experience in Google's **site reliability engineering (SRE) principles**

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

across **hybrid and multicloud systems**, such as for regulatory compliance purposes

6. Support for **cloud-native application** development and microservices

7. Experience in **application programming interface (API)**, automation, data science, AI and machine learning

8. Experience in measuring and optimizing **cloud-related carbon emissions** on the GCP

Data Analytics and Machine Learning

Definition

This quadrant assesses providers that showcase strongly differentiated capabilities in leveraging big data technologies and machine learning, especially in bleeding-edge deep learning algorithms and API libraries available and accessible through GCP. These include Tensorflow, Dialogflow, Kubeflow, BERT, GLaM, MURAL applications, federated learning algorithms, Vertex AI, AutoML, responsible and explainable AI, computer vision, augmented reality (AR), virtual reality (VR) and extended reality (XR) applications and IoT. The providers should demonstrate foundational capabilities in big data and machine learning on GCP at scale. These capabilities can include using CloudSQL, Cloud Dataproc, BigQuery, Cloud Datalab and Datastore, running and developing solutions/services on the migrated workloads from MySQL, Hadoop, Spark and Hive on GCP, large language models, transformers and autoencoders, Programming By Example (PBE) and Few-Shot Learning (FSL) algorithms.

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

Eligibility Criteria

1. Scope and use of relevant **tools and technologies**

2. Integration and innovation of **holistic DAML** services and solutions

3. Availability of practices and programs to upgrade skills and **boost customer success** (for example, consulting or best practice frameworks, ROI identification and business case development)

4. Availability, experience and certifications of resources and competencies in the **GCP DAML**-related tech stacks

5. Availability of **GCP-focused offerings, roadmaps** and **innovations** (current and planned)

6. Number and reputation of case studies and client examples about **DAML services and solutions** on GCP

7. A point of view around recent developments in machine learning, such as **large language models**

8. Strong focus and expertise in a broad range of GCP's AI-driven tools to help enterprises move away from **conventional data management practices** and **frameworks**

9. Focus on building **industry-based solutions** to resolve industry-specific business problems

Managed Services

Definition

The quadrant assesses managed public cloud service providers offering professional and managed services to augment Google's built-in capabilities, including IaaS and PaaS. The professional and managed services include orchestration, provisioning, real-time and predictive analytics, and monitoring and managing a customer's public cloud and multicloud environments. The goal is to maximize the performance of enterprise cloud workloads, reduce costs and ensure compliance and security.

Service providers typically offer significant levels of automation and transparency over the managed cloud resource pool to customers using specially developed or licensed cloud management platforms and tools. SLAs for managed services normally encompass a wide range of services to drive business value, such as data management and governance, machine learning capabilities, and ESG and sustainability tools and assets. Managed service providers also have teams well-versed in GCP-native skills such as cloud-native operations, site

reliability engineering (SRE) and platform reliability engineering (PRE). The maturity of managed services offerings for GCP can also include usage and impact of innovative IPs and tools and service delivery frameworks. These include: cloud FinOps, automation tools to improve service availability and resilience, cloud and data security, regulatory compliance and governance tools.

Eligibility Criteria

1. Experience in **designing, building and managing public and multicloud environments** with a focus on Google Cloud Platform

2. Supporting the development of **software code, cloud native architectures** and legacy system integration

3. Experience in **implementing both Agile and DevOps** and integrating with clients' existing processes

4. Experience in **API automation and cloud analytics**

5. Possess well-developed **security practices** and capabilities

6. Strength of the provider's partnership with Google Cloud, measured by the number and category of **relevant certifications**, duration of its relationship with Google Cloud and evidence of strategic cooperation between the provider and Google Cloud

7. Proven use cases or proofs of concept (PoCs) in **healthcare, sustainability, banking, financial services and insurance** (BFSI) and other industry verticals

SAP Workloads

Definition

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

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

Eligibility Criteria

1. Scope and depth of service portfolio for **migrating workloads** to SAP on Google Cloud Platform

2. Experience and expertise in rapid **process discovery, roadmap creation, migration impact assessment** and rightsizing assessment

3. Ability to **develop and design new processes** and customer outcomes for SAP on Google Cloud;

4. Offering **customization, provisioning and support** to implement SAP applications and services

5. Ability and willingness to support **hybrid cloud** and hybrid provider environments

6. Strength of the provider's relationship with Google Cloud, measured by the number and type of **Google Cloud Certifications** from the Google Certified Cloud Program, and its relationship with SAP, measured by relevant SAP certifications

7. Experience in Google's **site reliability engineering principles**

8. Ability to support SAP's **software-as-a-service** (SaaS) model on GCP

Definition

This quadrant assesses GSIs and IT providers offering advisory, migration and integration services for Google Workspace, Google's suite of productivity and collaboration and content tools for enterprises. Workspace provides a broad range of apps, including Gmail, Meet, Chat and Drive, to drive enterprise productivity and real-time collaboration. Google Workspace, which evolved from the G Suite productivity package, is developing rapidly and incorporating intuitive analytics plus numerous data and device administration and security features.

Google Workspace brings personalized user experiences into controlled and secure enterprise environments. It allows multidevice and multichannel workspace integration and helps users get a seamless experience across their professional communication and content-sharing practices. Enterprises seek providers that can orchestrate, integrate and augment the native Workspace functionality through design and build services on intranets, websites and integration with additional enterprise and third-party data sources and applications.

They should also provide training and change management services, advanced data search and retrieval capabilities, and license and cost management and enable advanced security management for data and devices. Enterprises are primarily looking for providers that can easily integrate Workspace's native tools and make data and content flow seamlessly across an enterprise.

Eligibility Criteria

1. Ability to offer **advisory, design and consulting** services for Workspace services on Google Cloud

2. Experience in providing **training and change management** services for Workspace services

3. Experience in **legacy migrations to Workspace**, especially from Lotus Notes-based on-premise email systems

4. Demonstrate advanced **content analytics and data search capabilities** for company content across Workspace

5. **Administration, IT governance and security services** for data workloads and modern endpoint management

6. Offer services and frameworks to **accelerate low-code/ citizen developer** activities on Workspace

7. Provide organization-specific **data analytics and insights around Workspace**, such as adoption rates and patterns of working and collaboration

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Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following five quadrants in Google Cloud Ecosystem Partners 2023.

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

The research phase falls in the period between March and April 2023, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in August 2023.

Milestones	Beginning	End
Survey Launch	March 9, 2023	
Survey Phase	March 9, 2023	April 6, 2023
Sneak Preview	July 2023	
Press Release & Publication	August 2023	

Please refer to the link to view/download the ISG Provider Lens™ 2023 research agenda.

Access to Online Portal

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

Research Production Disclaimer:

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

ISG Star of Excellence™ – Call for nominations

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

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

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

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

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

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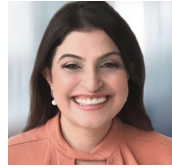
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ISG Provider Lens™ Advisors Involvement Program

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

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

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

The consultant advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study

Michael Gale
Partner, Australia

Bernie Hoecker
Partner, U.S.

Susanta De
Partner, Europe

Invited Companies

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

Accenture*	CI&T*	Datatonic*	ESX
adesso SE	Cloud Fresh	Deal	Extreme Digital Solutions
Aliz Technologies*	Cloud Reach*	Dedalus Prime	FCamara
Ancoris*	Cloud4C*	66 Degrees*	FOTC
Appsbroker*	Cloudpilots	Deloitte*	Fractal Analytics
Arvato Systems	Cloudwurdig	Devoteam G Cloud*	G-company
Atos*	Cognizant Technology Solutions*	DoIT*	GCore
b.telligent	Compass UOL*	DP6	Genpact
BIP	Computacenter	DXC Technology*	Gentrop*
Birlasoft	Conecta Nuvem	Emergya*	GFT*
BRQ*	Contino	Endava	Globant*
CANCOM	Crayon	Engineering*	Go reply*
Capgemini*	CTS*	EPAM	GOWIZYOU
Capita	Datametica solutions	Equinix	Grid Dynamics*

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* Rated in previous iteration

G-workplace	Kokori Cloud	Noovle	Pythian
Happtiq	KPMG	Nordcloud Oy	QI Network
HCLTech*	Kyndryl*	NTT Data	Quantiphi*
Hexaware Technologies	Leega	Oi Soluções	Raccoon
Hitachi Vantara	Logicalis	OniGroup	Rackspace Technology*
HPE	LTIMindtree*	Orange Business Services	Reply
Huware	Lumen	OTG	Revevol Group
IBM*	Magna Sistemas	oXya*	revolgy
Ilegra	Mphasis	PA Consulting	Sabio
Infosys*	Multiedro*	Persistent Systems*	SADA*
IPNET*	Nagarro	Pipernet	Safetec*
Jetstack	Netpremacy*	Pitang	SantoDigital*
Kasna*	nioplogic	Pluto7 International	Sauter*
Knowit	Niteo	PwC*	Searce

Invited Companies

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

Seibert Media	Sopra Steria*	V8*
Servian*	Sotec	V8 Consulting
SFEIR	Stefanini	Valtech
SGA	TCS*	Vanenburg
Sky.One	Tech Mahindra*	Venha Pra Nuvem*
Slalom*	Teltec	Vexia
Softcat	Thoughtworks	Wipro*
Softline	TietoEvry	Zazmic
Softserve*	Tigabytes (Somos Nuvem)	Zensar
Softtek	TIM	Zzapps
SoftwareOne	TIVIT*	
Solvimm	T-Systems	
Sonata Software	T-Systems International*	
Sonda	Unisys*	

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™

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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 isg-one.com.

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